

Create Custom Fields

If you need to store information that is specific to your business or industry, you'll create custom fields. Custom Fields are located in records. You are able to add up to 100 custom fields per record type.

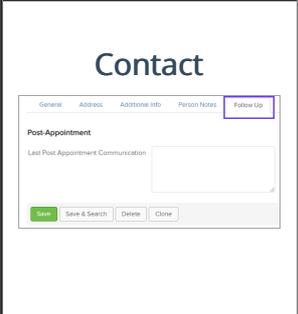
Unfortunately, we are not able to add additional custom fields if you exceed 100.

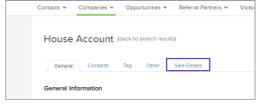
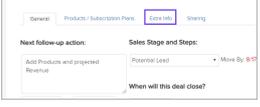
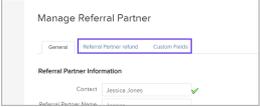
Record Types

Record types are different areas of business within the application. They indicate where the custom fields are located. For example, if you create a custom field for an Order Record, you would go to any Order to see the Custom field tab.

- **Reports:** Fields can be accessed through search criteria and added as a column for the results. For more information regarding Search reports, click [here](#) .
- **Merge Fields:** A placeholder used to insert personalized content into a marketing piece such as an email. For example, ~Contact.FirstName~ is a "**Merge Field**" that inserts the value stored in the **First Name** field of the contact record into the email. For more information, click [here](#) .
- **Automation:** Automate actions through web forms, landing pages, internal forms, timers, and appointments. For more information, click [here](#) . Only Contact records are available for automate actions. The other records are manually added/updated.

Pro Tip! Click images in the table to view larger.

Record Type	Reports	Merge Fields	Automate Actions
	X	X	X

<p>Subscription</p> 	X		
<p>Order</p> 	X	Legacy Invoice	
<p>Company</p> 	X		
<p>Task/Appt/Note</p> 	X		
<p>Opportunity</p> 	X		
<p>Referral Partner</p> 	X		

Custom fields consist of

- a. **Tab** - Contains a collection of fields that share a common type or purpose.

General Address Additional Info Person Notes **Follow Up**

Post-Appointment

Last Post Appointment Communication

Save Save & Search Delete Clone

- b. **Headers** - The header groups fields within the tab. There may be multiple headers under one tab.

General Address Additional Info Person Notes Follow Up

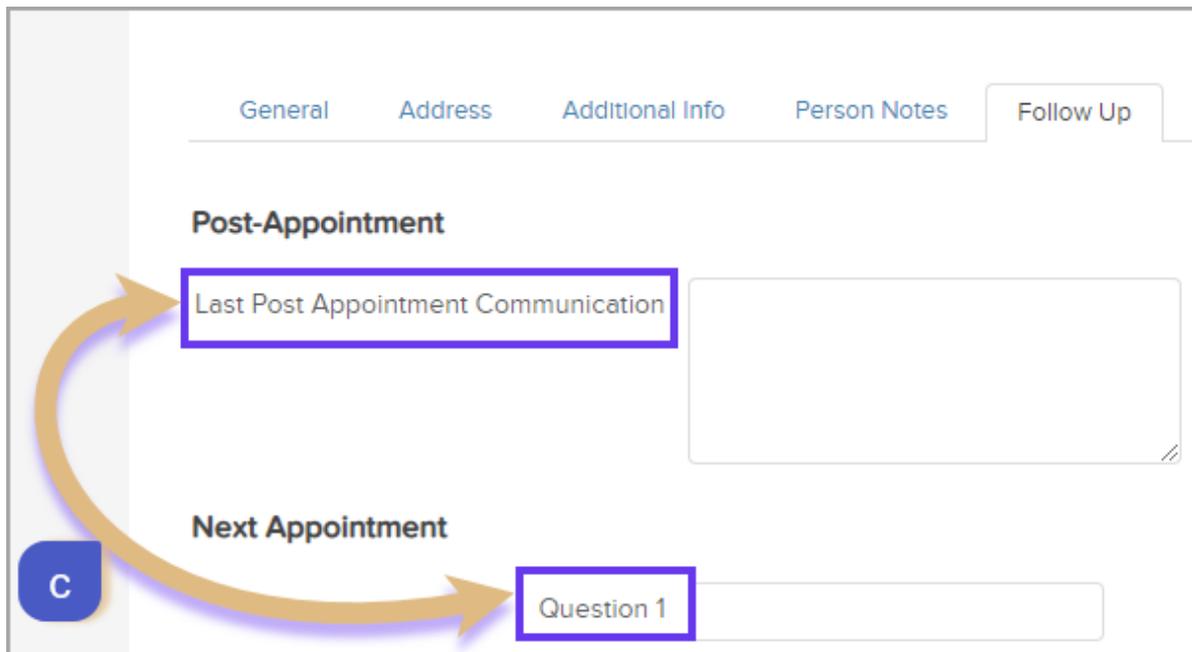
Post-Appointment

Last Post Appointment Communication

Next Appointment

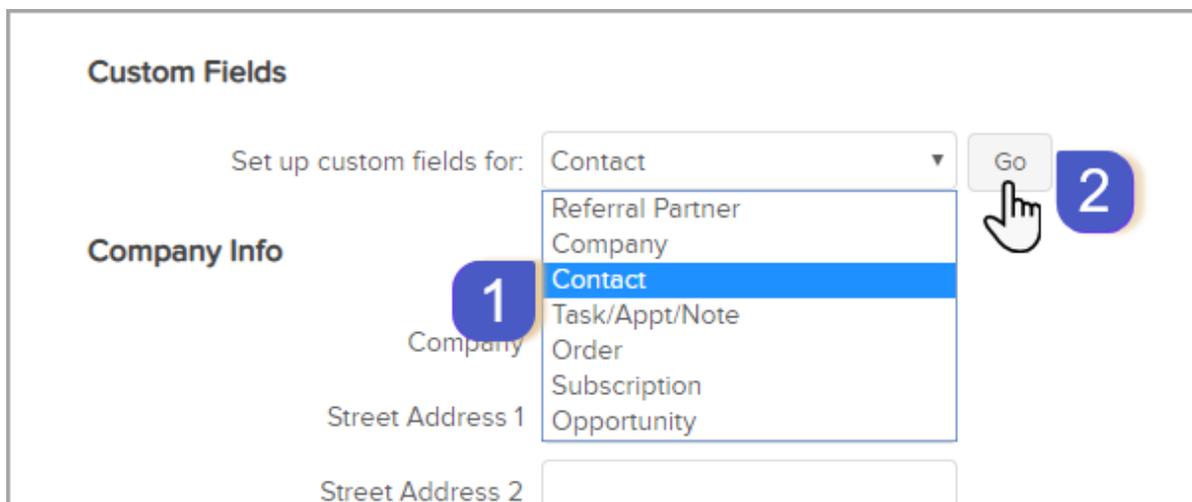
Question 1

- c. **Field** - Holds information about a contact. There may be multiple fields within one header. The "Field Name" should be short, descriptive, include at least one alphanumeric character, and be unique.



How to create a custom field

1. Go to Admin > Settings
2. Select a record type from the drop-down list and click on Go.



3. Select "Field" from the drop-down and click Add

Custom Fields for the Contact Record

Custom fields show up in their own tab(s) on the contact record, underneath a header. You can create custom fields and can have as many tabs and headers as you would like. You currently have 5! fields.

Field Add 

[View the field database](#)

Tab: Follow Up

Header: Post-Appointment(Edit)



4. Enter the **Field Name** and select the **Field Type**

Field Add

Name your field and choose what type of field it is:

1 Name:

Type: [Which field type should I use?](#)

[Show advanced options...](#)

Field ▼ Add

Name your field and choose what type of field it is:

Name:

Type: Text ▼ Which field type should I use?

Show advanced options 2

Save this field

View the field

Tab: Follow up

Header: Follow up ▼

Last Post: Follow up

Header: Follow up ▲

Question 1

Question 1 score

Radio

(Edit) (Delete)

(Edit) (Delete)

(Edit) (Delete)

Warning! Once you save a custom field, you will not be able to change its field type. In the case that the wrong field type is used, you will need to either create a new field or delete the incorrect custom field and restart the creation steps. When you **delete** a custom field, all data contained in the field will be removed forever. **This process cannot be undone!**

5. Click on the **Show advanced options** to organize this field by tab and header

Field Add

Name your field and choose what type of field it is:

Name:

Type: Which field type should I use?

Show advanced options...

 **1**

or

a. **Tab:** Choose a tab from the drop-down list or add a new tab.

Hide advanced options...

Pick the tab & header you want this field to go under:

Tab: Add new tab...

a

- Please select a Tab
- Follow Up**
- Support Requests

[View the field database](#)

b. **Header:** Choose a header from the drop-down list or add a new header.

Pick the tab & header you want this field to go under:

Tab: Add new tab...

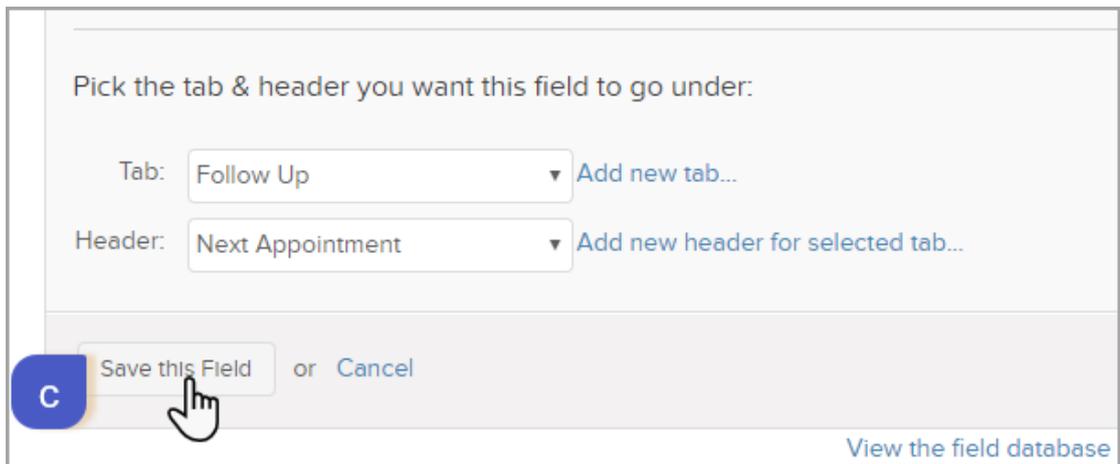
Header: Add new header for selected tab...

- Please select a Header
- Post-Appointment**
- Next Appointment

b

[View the field database](#)

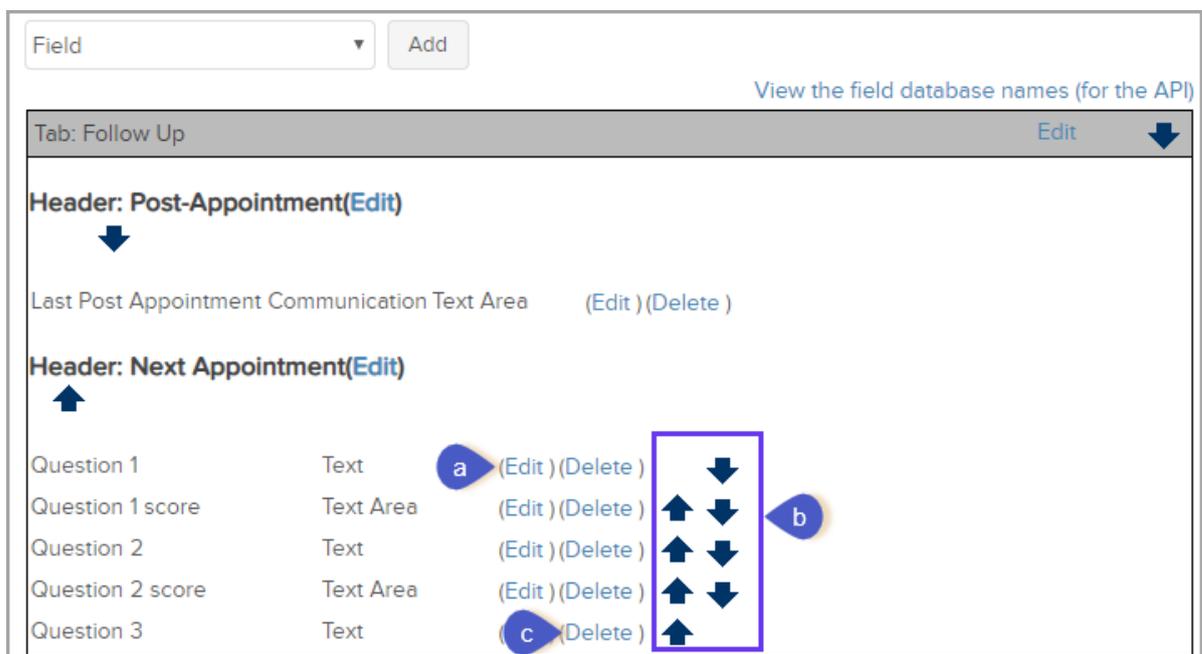
c. Click on **Save this Field**



Custom Field Summary - edit, arrange, and delete

The new tab, header, and field are now displayed in the custom field summary

- Click on **Edit** to change the tab, header or field names.
- Click on the **arrows** to change the order of headers and fields.
- Click on **Delete** to completely remove the field from the database.



Warning! When you delete a custom field, all data contained in the field will be removed forever. This process cannot be undone!

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