

Choose Custom Field Types

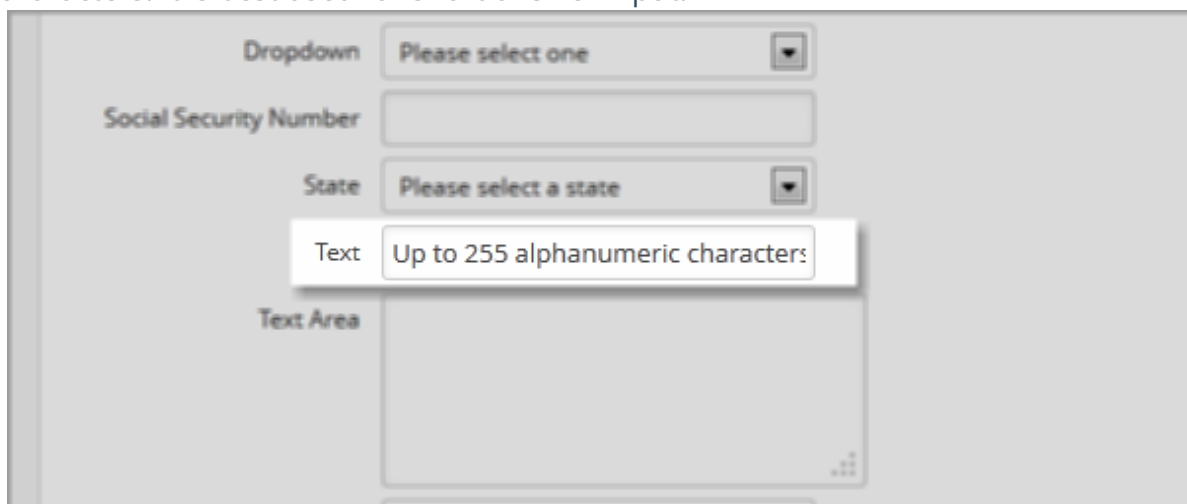
You can add up to 100 custom fields per record type in Infusionsoft (contact, referral partner, company, task, opportunity, order, subscription.) The field type you choose should correspond with type of data you want to store in a field that satisfies your end goal for the data (i.e. reporting, merge field, etc.)

Changing a Custom Field Type! Please note that you cannot change an existing field type to another type. For example, if you create a radio button and then later decided you want a drop-down box instead, you will have to create a new drop-down field and remove the old one. In many cases, however, you can export data out of your old fields into a csv and then re-upload the data into the new field.

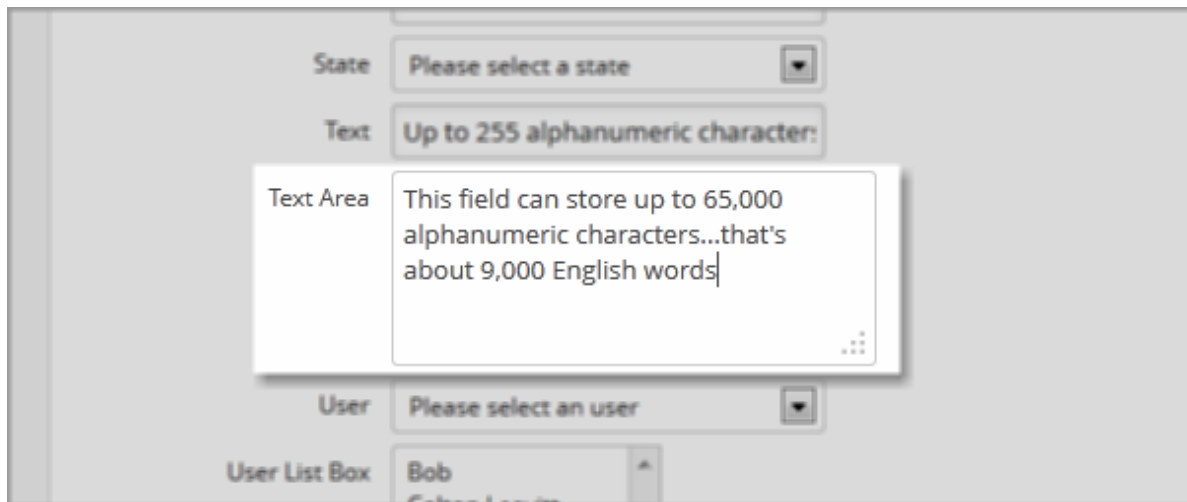
Free Form Text and Number Fields

Use the free form fields to store variable information that is custom for each person (i.e. favorite restaurant.) These types of fields are not as useful for reporting; they are most commonly used as reference fields and merge fields in emails, letters, and task templates. The number fields can also be used to calculate sums and averages when a report is exported from Infusionsoft or created with the little box o' stats home page widget.

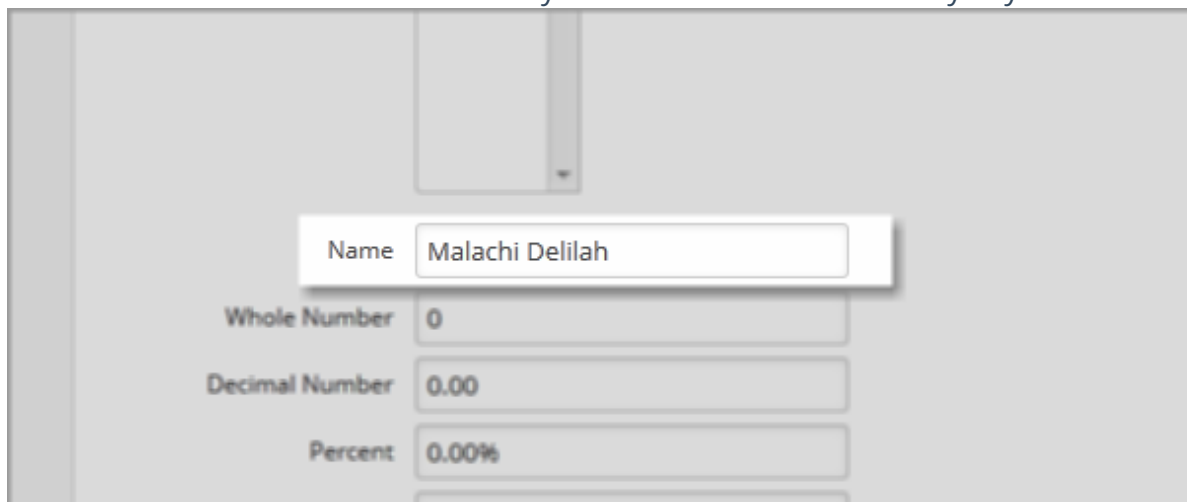
- **Text:** Stores all types of data (letters, numbers, and symbols), but is limited to 255 characters. It is best used for short-answer input.

A screenshot of a form builder interface. It shows several field types: a 'Dropdown' field with the placeholder text 'Please select one', a 'Social Security Number' field, a 'State' field with the placeholder text 'Please select a state', a 'Text' field with a tooltip that says 'Up to 255 alphanumeric characters!', and a 'Text Area' field. The fields are arranged vertically on a light gray background.

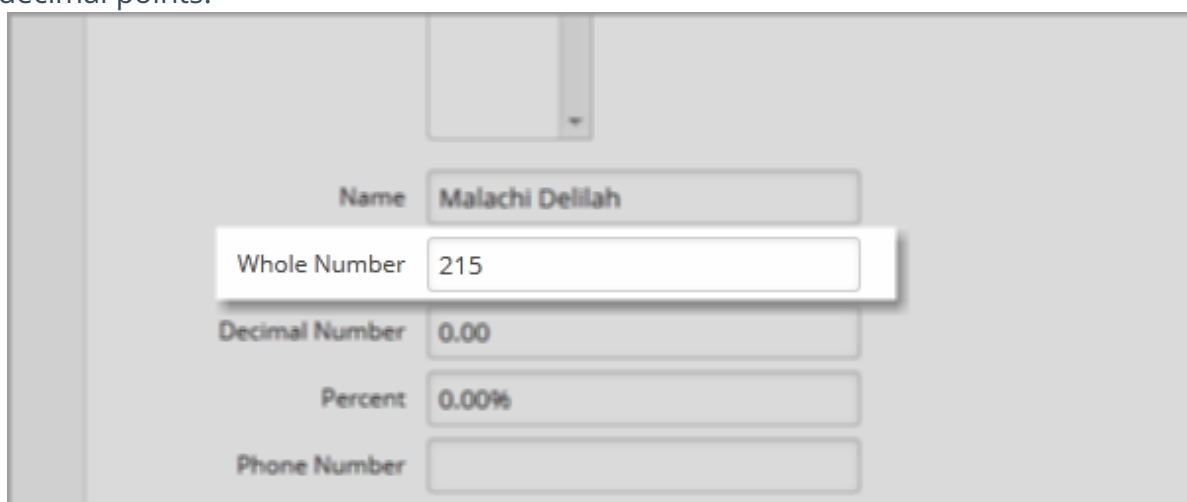
- **Text Area:** Stores all types of data (letters, numbers, and symbols). Allows for about 65,000 characters, which is about 9,000 English words. It is often used to capture open ended feedback from a web form (i.e. survey or contact us.)



- **Name:** Similar to a text field, but designed to be like the standard first and last name fields. It allows you to search by first or last name. You can create two of these; one for first name and one for last name if you want even more flexibility in your search.



- **Whole Number:** Stores whole numbers only. It will not accept letters, symbols, or decimal points.



- **Decimal Number:** Stores decimal numbers. It will not accept letters or symbols. The

decimal will round to the hundredths.

A screenshot of a form with several input fields. The fields are: Name (Malachi Delilah), Whole Number (215), Decimal Number (355.81), Percent (0.00%), Phone Number (empty), and Radio buttons (Option 1 and Option 2). The 'Decimal Number' field is highlighted with a white box.

- **Percent:** Stores any number, but displays it with a decimal point and a percentage (%).

A screenshot of a form with several input fields. The fields are: Name (Malachi Delilah), Whole Number (215), Decimal Number (355.81), Percent (52.72%), Phone Number (empty), and Radio buttons (Option 1 and Option 2). The 'Percent' field is highlighted with a white box.

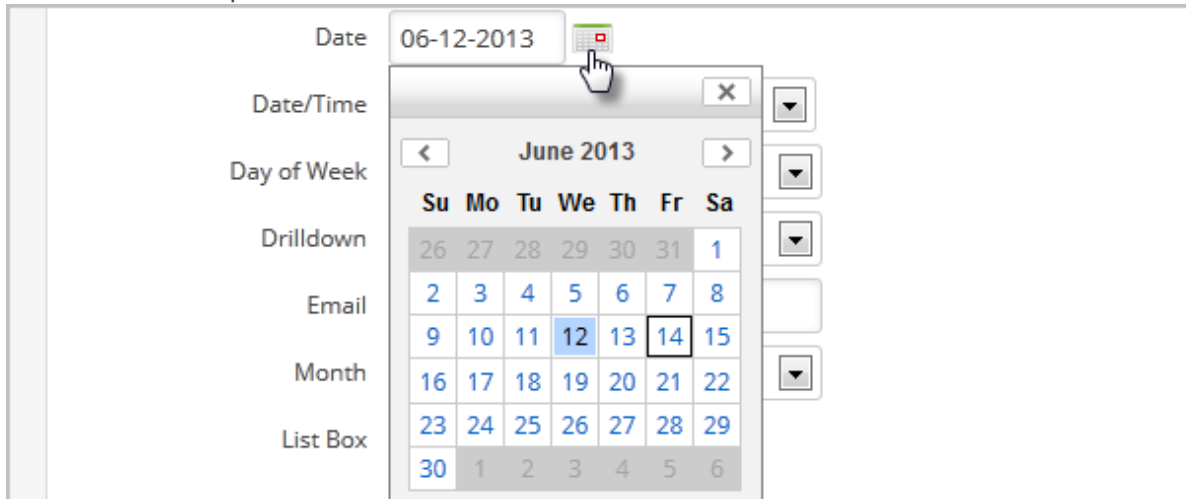
- **Currency:** Stores any number, but displays it with a decimal point and a dollar sign (\$).

A screenshot of a 'Custom Fields' section in a software interface. The fields are: Currency (\$47.99), Date (empty), Date/Time (12:00 AM), and Day of Week (Please select a day of week). The 'Currency' field is highlighted with a white box.

Date Fields

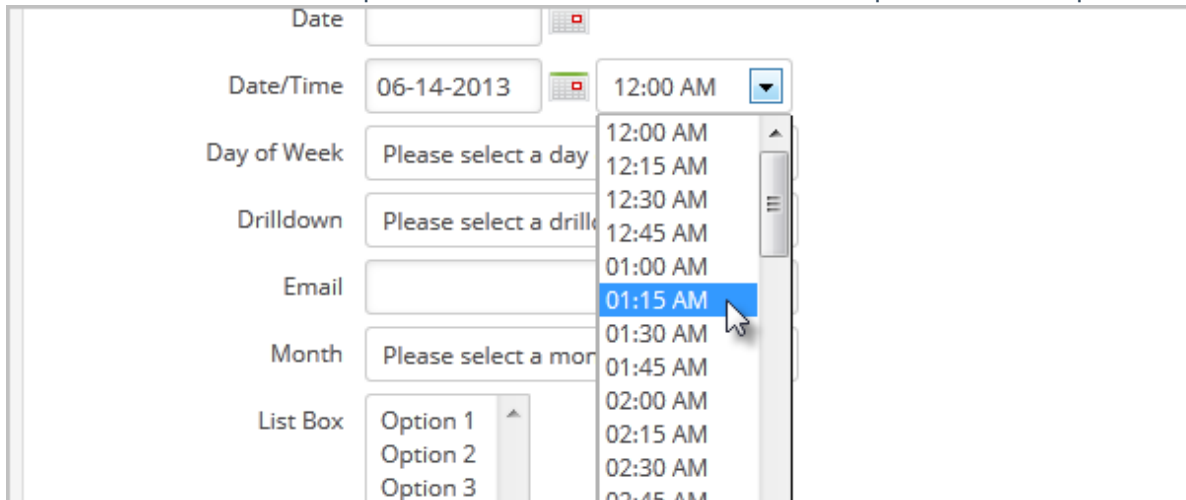
Use date fields to store custom date information like birthdays, special events, renewal dates, etc. The dates can be merged into emails, letters, and task templates to personalize them and to use them as event reminders.

- **Date:** Stores a custom date. Use date fields to track event dates (i.e workshop, appointment, renewal), merge the date into follow-up communications, and to schedule steps within a campaign sequence. Note: The date picker calendar icon does not show up on web forms.



The screenshot shows a form with several fields. The 'Date' field is set to '06-12-2013' and has a calendar icon. A calendar picker is open, showing the month of June 2013. The calendar grid has columns for days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and rows for dates. The date '14' is highlighted with a blue box. Other fields include 'Date/Time', 'Day of Week', 'Drilldown', 'Email', 'Month', and 'List Box'.

- **Date and Time:** Stores a custom date and time that can be merged into follow-up email, letter, and task templates. It is also used to schedule steps within a sequence.



The screenshot shows a form with several fields. The 'Date/Time' field is set to '06-14-2013' and has a calendar icon. A time picker is open, showing a list of times from 12:00 AM to 02:45 AM. The time '01:15 AM' is highlighted with a blue box. Other fields include 'Date', 'Day of Week', 'Drilldown', 'Email', 'Month', and 'List Box'.

- **Day of Week:** Stores the name of a day in text format (i.e. Monday.)

| | | |
|-------------|-----------------------------|----------|
| Date/Time | 06-14-2013 | 12:00 AM |
| Day of Week | Please select a day of week | |
| Drilldown | Please select a day of week | |
| Email | Monday | |
| Month | Tuesday | |
| List Box | Wednesday | |
| | Thursday | |
| | Friday | |
| | Saturday | |
| | Option 2 | |
| | Option 3 | |

- **Month:** Stores the name of a month in text format (i.e. January.)

| | |
|----------|-----------------------|
| Month | May |
| List Box | Please select a month |
| | January |
| | February |
| | March |
| | April |
| | May |
| | June |
| | July |
| | August |
| | September |
| | October |
| | November |
| Name | December |

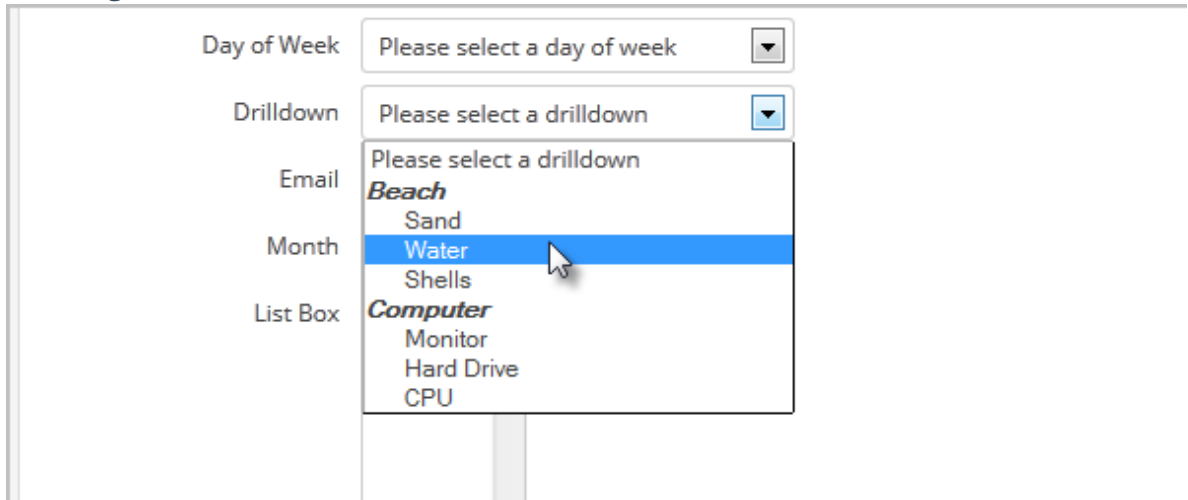
- **Year:** Enter a year in numerical format (i.e. 2016.)

| | |
|---|---|
| | Roy Samuel Samuel not admin |
| Website | <input type="text"/> |
| Year | 2015 |
| Yes/No | Yes <input type="radio"/> No <input checked="" type="radio"/> |
| <input type="button" value="Save"/> <input type="button" value="Save & Search"/> <input type="button" value="Delete"/> <input type="button" value="Clone"/> | |

Option Lists

Use option list fields to create solid criteria for searching and reporting in Infusionsoft. You predefine a limited number of options for each field instead of allowing users and website visitors to enter whatever they want.

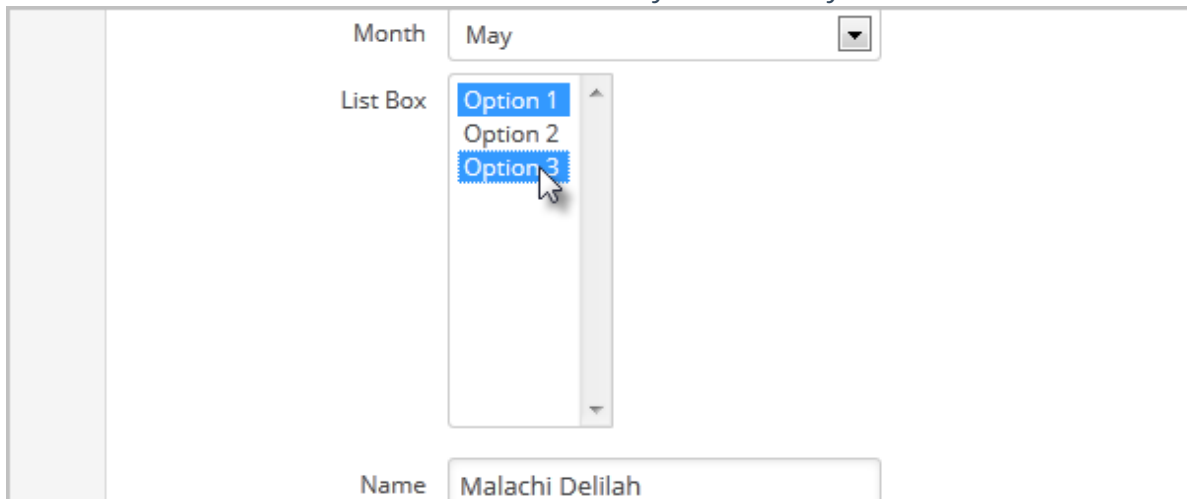
- **Drill-down:** Creates a drop-down list that has multiple main categories with multiple subcategories.



The screenshot shows a form with several fields. The 'Drilldown' field is selected, and its dropdown menu is open. The menu displays the following options:

- Beach**
 - Sand
 - Water** (highlighted)
 - Shells
- Computer**
 - Monitor
 - Hard Drive
 - CPU

- **List Box:** Creates a list of options. The list box permits multiple selections when a user or website visitor holds down the CTRL key on their keyboard.



The screenshot shows a form with a 'Month' dropdown menu set to 'May' and a 'List Box' containing three options: 'Option 1', 'Option 2', and 'Option 3'. All three options are selected, indicated by blue highlights. Below the list box is a text field labeled 'Name' containing the text 'Malachi Delilah'.

- **Radio:** Creates radio button options that all display at once. Only one option can be selected at a time.

Decimal Number: 333.61

Percent: 52.72%

Phone Number: []

Radio: Option 1
 Option 2

Dropdown: Please select one [v]

Social Security Number: []

State: Please select a state [v]

- **Drop-down:** Creates a drop-down list with a limited number of options. The user must click on the list to view and select from the options. Only one option can be selected at a time. You can add up to 499 items in each drop-down list.

Radio: Option 1
 Option 2

Dropdown: Please select one [v]

Social Security Number: []

State: Please select one
Option 1
Option 2
Option 3

Text: Up to 255 alphanumeric character:

Text Area: This field can store up to 65,000 alphanumeric characters...that's about 9,000 English words

- **User:** Lists the names of your Infusionsoft users. This can be used to merge in multiple user's names into email messages (i.e. sales rep and account manager.)

User: Please select an user [v]

User List Box: Please select an user
Bob
Colton Leavitt
Eli
Katie Webb
Martin Cash
Mike Bast
Plia
Roy
Samuel
Samuel not admin

- **Yes / No:** This is a radio field that only has 2 options: *Yes* or *No*.

Samuel not admin

Website

Year

Yes/No Yes No

Save Save & Search Delete Clone

Specially Formatted Contact Fields

Use the specially formatted contact to expand the number of standard contact fields.

- **Email Address:** Stores an additional email address with a "send email" icon. Use this field to add more than 3 email addresses to a contact record.

Date/Time

Day of Week

Drilldown

Email

Status: Unconfirmed [Manage Email Status...](#)

Month

List Box

- **Phone Number:** Converts a number to U.S. phone number format - (XXX) XXX-XXXX. Use this field to add more than 5 phone numbers to a contact record.

Whole Number 215
Decimal Number 355.81
Percent 52.72%
Phone Number (555) 555-5555
Radio Option 1
 Option 2
Dropdown Please select one
Social Security Number

- **Social Security Number (SSN):** Converts a number to the U.S. Social Security number format, XXX-XX-XXXX. The Social Security number field is encrypted. After the number is added, your users will only be able to view the last 4 digits as shown in the image below.

Radio Option 1
 Option 2
Dropdown Please select one
Social Security Number XXX-XX-0000
State Please select a state
Text Up to 255 alphanumeric character:
Text Area This field can store up to 65,000 alphanumeric characters...that's

Important Note! The only way to export the full SSN is to run a contact export and choose the SSN field.

Job Title
 Website
 SSN
 Last 4 SSN Last four digits of SSN
 Middle Name
 Apado

If the user is not an admin, they will need the ability can export lists to be enabled.

Can delete company files

This permission controls the ability to delete files from the application file box. If it is set to No, the user will not see the delete option on any of the Action menus throughout the application.

Can export lists ←

This permission controls the ability to export any kind of data (e.g., contacts, orders, etc...) from the application. If it is set to No, the user will not see the Export option on any of the Action menus throughout the application.

Can edit Misc Settings

This permission controls access to various settings throughout the system. If it is set to No, the user will not see the link to the marketing, e-commerce, or admin settings from the master nav. They will still be able to access these settings from the user profile page.

- **State:** Creates a U.S. state drop-down in the contact record.

Radio Option 1
 Option 2

Dropdown Please select one

Social Security Number XXX-XX-0000

State Please select a state

Text Please select a state

Text Area Alabama
Alaska
Arkansas
Arizona
California
Colorado

- **Website:** Converts a website address into a hyperlink for one-click access to the website listed. The hyperlink works with or without *http://*.

Mike Bast
Pia
Roy
Samuel
Samuel not admin

Website ↗

Year

Yes/No Yes No

Save Save & Search Delete Close

