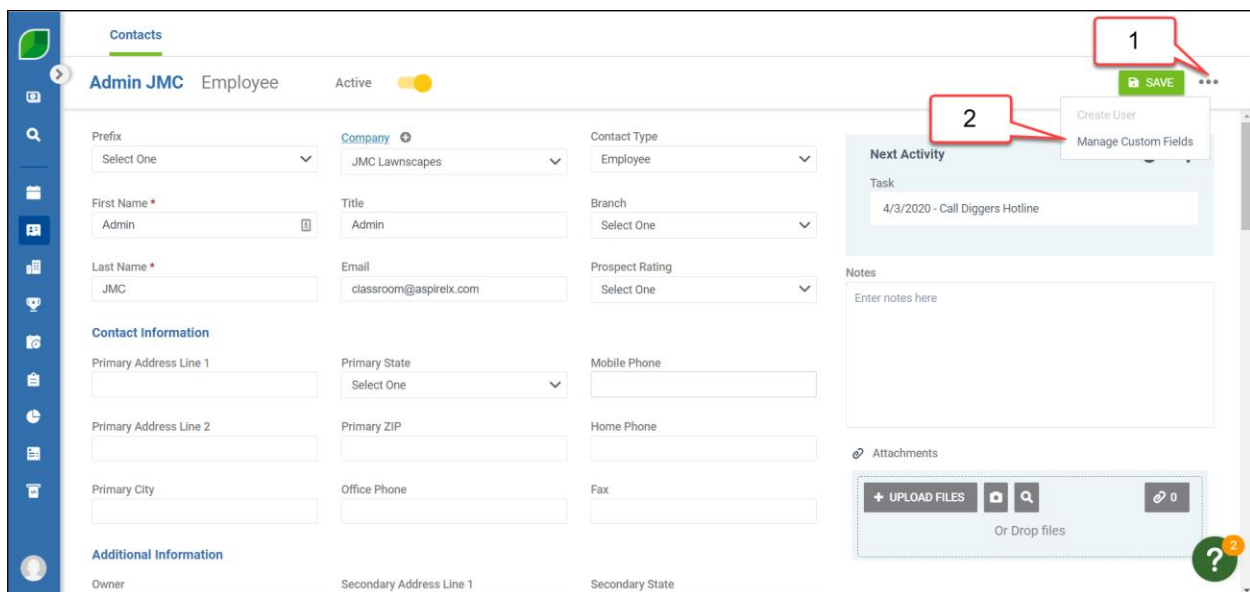# Creating Custom Fields

Purpose: Creating or modifying Custom Fields on Contact, Property and Equipment records to track specific information such as customer birthdays, house values, or if a property has pets.
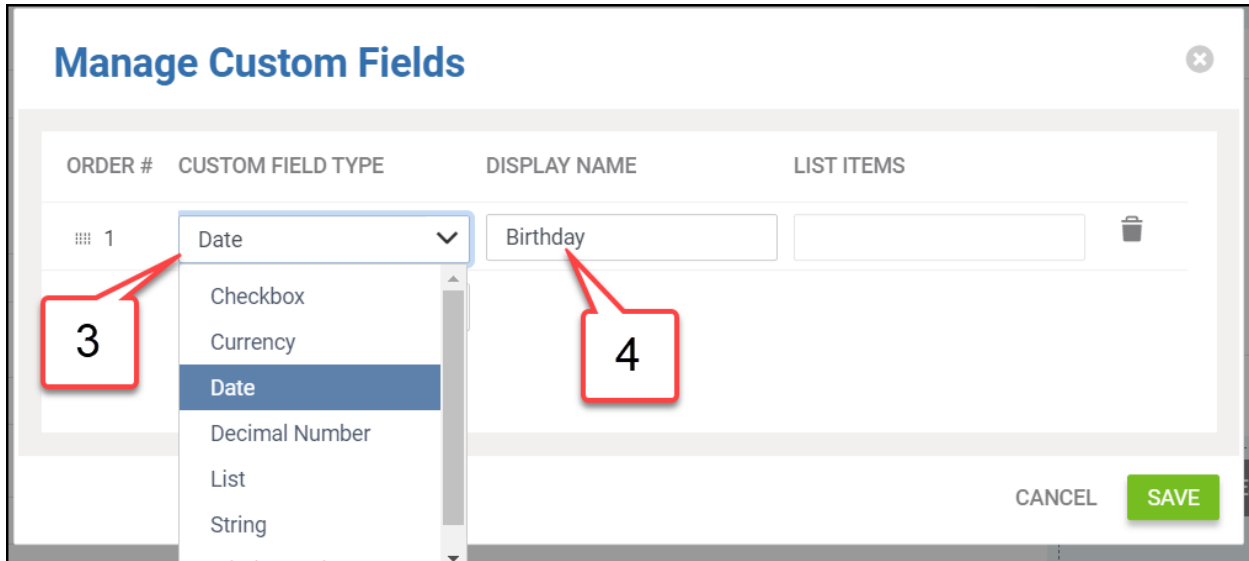
Prerequisites:

1. **To view or edit the desired record (contact, property or equipment), appropriate role permission must be assigned to the user (Edit My Contacts, Edit All Contacts, Edit All properties, Edit My Properties, View Equipment)**

2. **System Admin permission required to add or modify custom fields**

To add a Custom Field on a record, follow these steps:

1. Click on the ellipsis icon (three dots in the upper right hand corner).
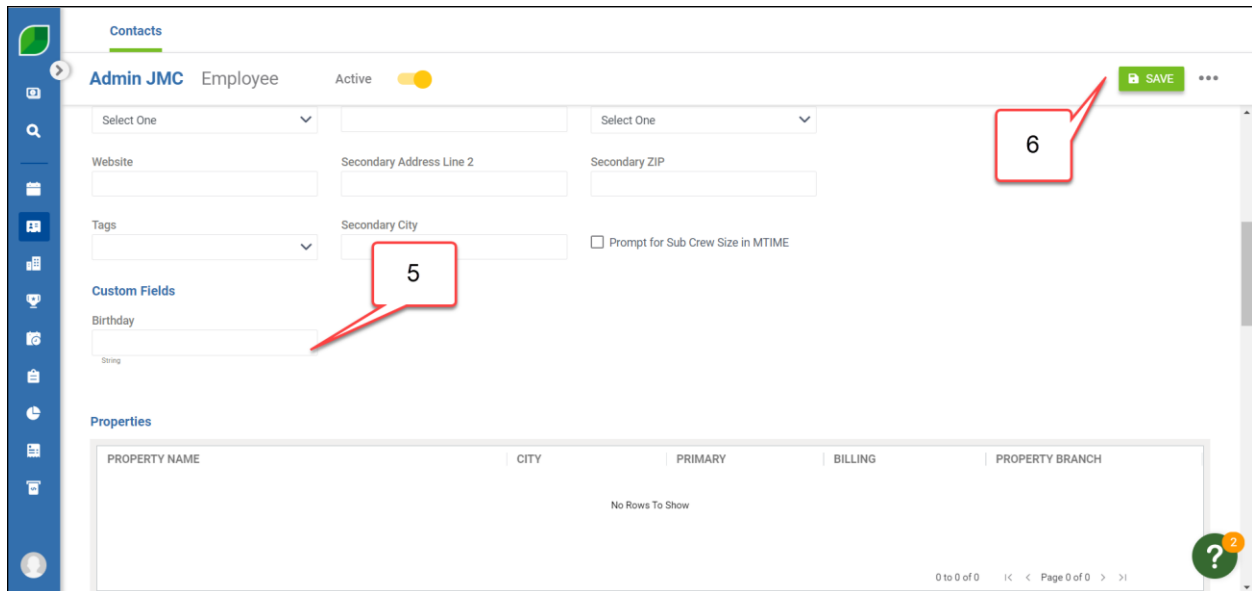
2. Click *Manage Custom Fields.*

3. Pick the type of field.

   a. String is a text field. Example, "James Smith."

   b. Date is a calendar. Example, "2/2/2018."

   c. Whole Number is a number without a decimal. Example, "50."

   d. Decimal Number is a number that can have a decimal. Example, "1.5."

   e. Checkbox is a box that can be checked. Example, "☐"

   f. Currency displays dollar amounts.   Example, "$52.55"

   g. Lists allow for users to select from a list of options.
      Note: Go to Page 7 to see how to create a List

4. Type in the field name desired
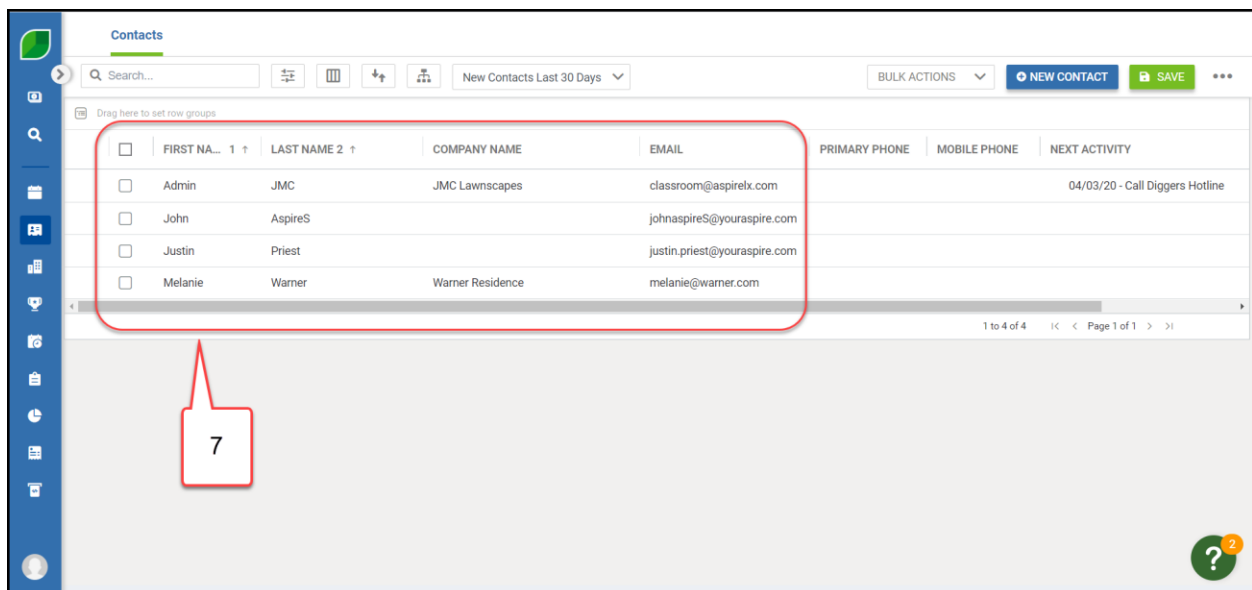
5. Entered the required information.

6. Click Save.
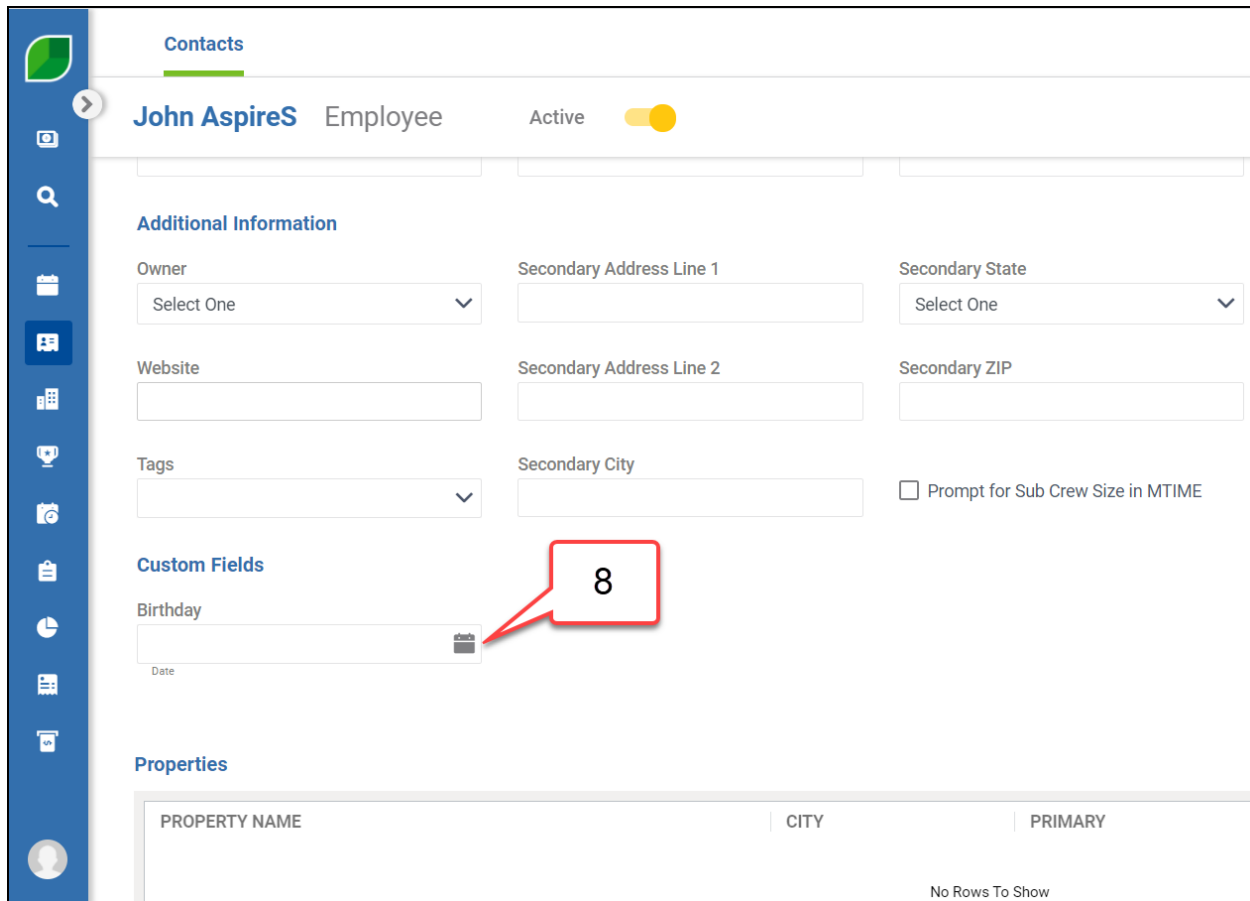
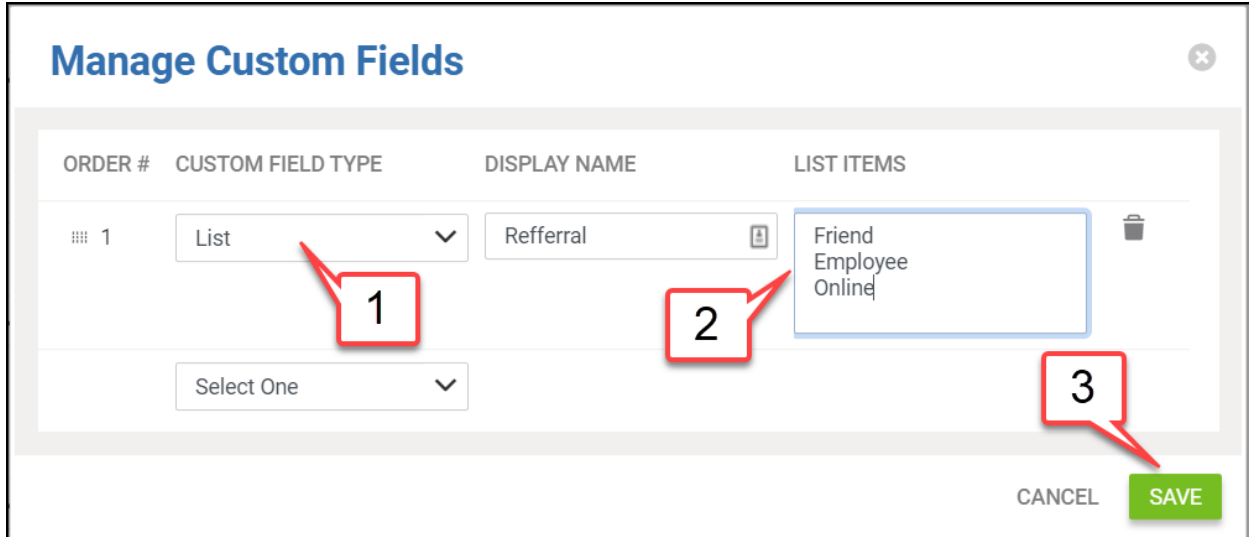7. Click on any record and enter in the information.

8. The custom field can be used by all users.
   Note: System Admin will still see the option for editing the custom field.

Creating a List for a Custom Field

Purpose: Creating Lists for Custom Field.
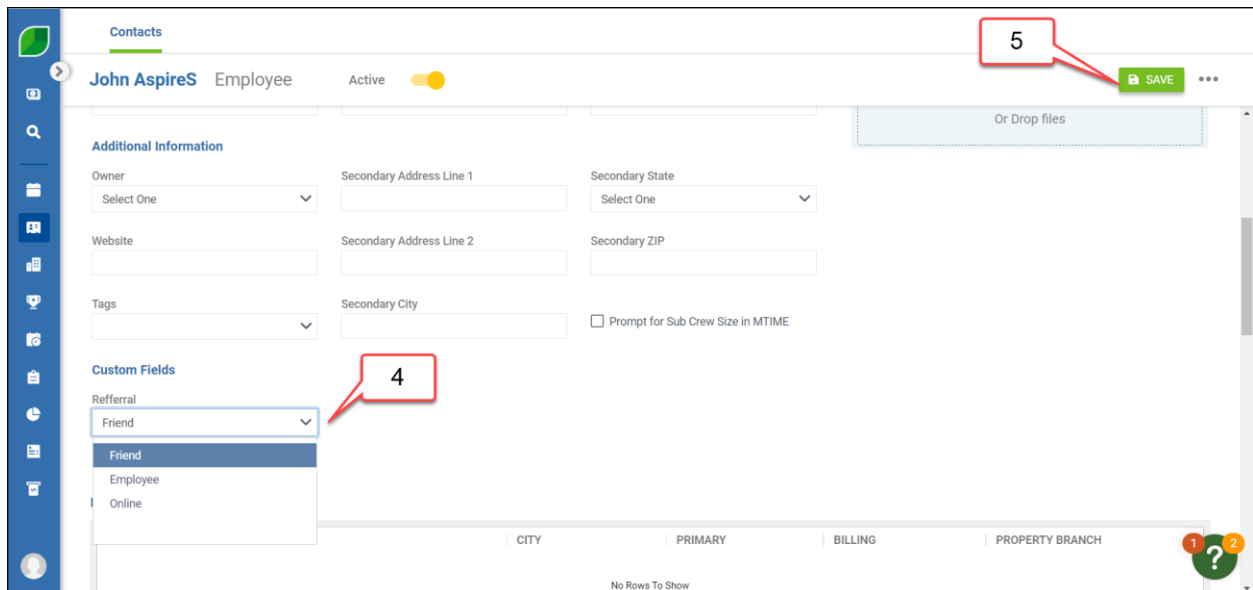
To add a Custom Field on a record, follow these steps:

1. Select List from the dropdown menu and select the List items.

2. Type in the entries for the List. Create a new line for every entry that should be in the dropdown list. Do not write all the entries on one line.

3. Select Save.

4. Check the dropdown for the Entries.

5. Select Save.