

# Custom Fields Overview

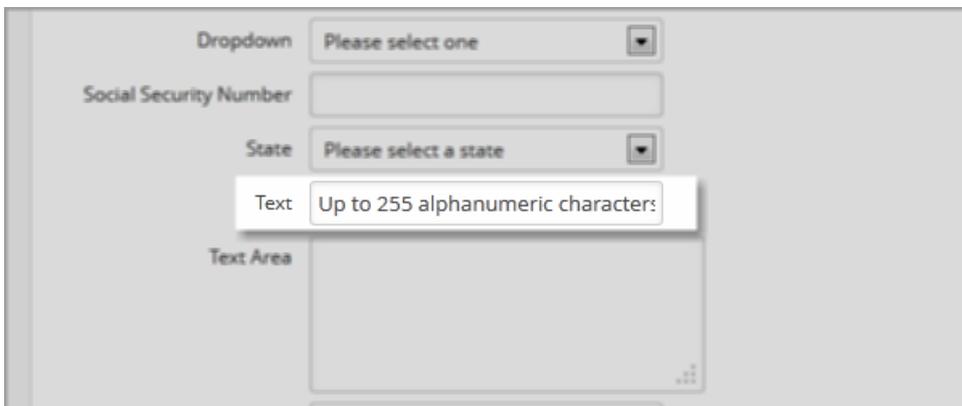
You can add up to 150 custom fields per record type in Infusionsoft (contact, referral partner, company, task, opportunity, order, subscription.) The field type you choose should correspond with type of data you want to store in a field that satisfies your end goal for the data (i.e. reporting, merge 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

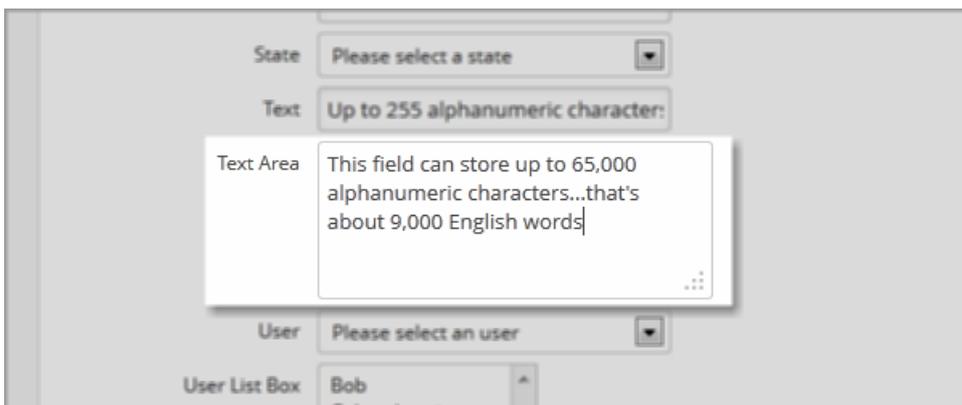
Use the free form fields to store variable information that is custom for each person (i.e. favorite restaurant.) These types of fields are not as useful for reporting; they are most commonly used as reference fields and merge fields in emails, letters, and task templates. The number fields can also 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.



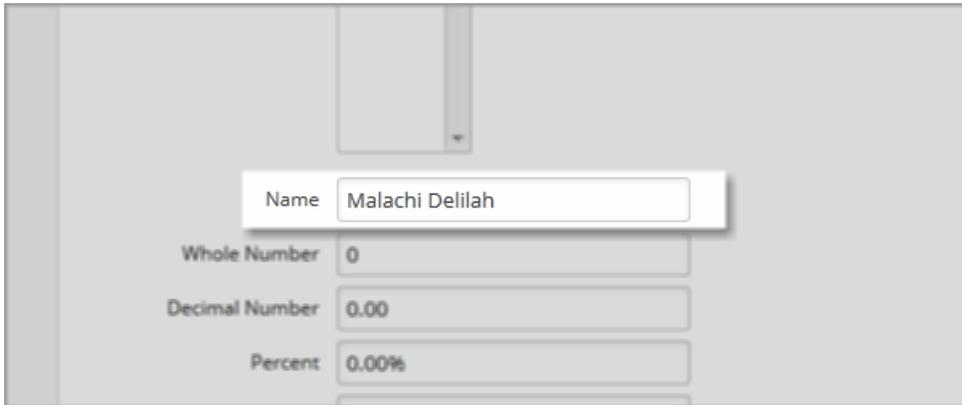
A screenshot of a form interface showing several field types. From top to bottom: a 'Dropdown' menu with the text 'Please select one' and a downward arrow; a 'Social Security Number' text input field; a 'State' dropdown menu with the text 'Please select a state' and a downward arrow; a 'Text' field with a tooltip that reads 'Up to 255 alphanumeric character:'; and a 'Text Area' field.

- **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.)



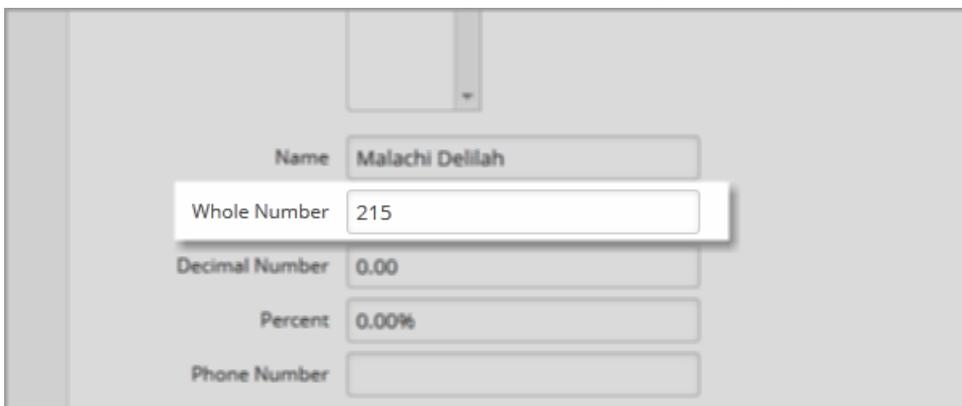
A screenshot of a form interface showing a 'Text Area' field with a tooltip. The tooltip text reads: 'This field can store up to 65,000 alphanumeric characters...that's about 9,000 English words'. Other fields visible in the background include a 'State' dropdown, a 'Text' field with a tooltip 'Up to 255 alphanumeric character:', a 'User' dropdown, and a 'User List Box' with 'Bob' selected.

- **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.



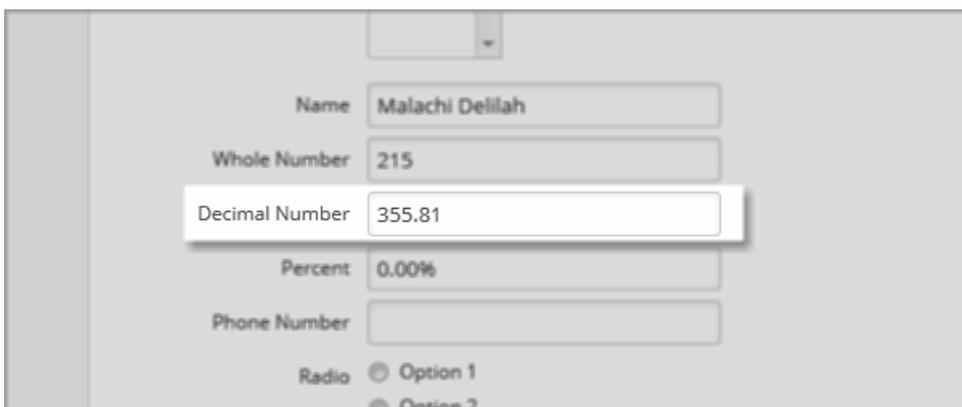
A screenshot of a form interface. At the top, there is a dropdown menu. Below it, the 'Name' field is highlighted with a white border and contains the text 'Malachi Delilah'. Underneath the name field are three other input fields: 'Whole Number' with the value '0', 'Decimal Number' with the value '0.00', and 'Percent' with the value '0.00%'. The background is a light gray.

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



A screenshot of a form interface. The 'Name' field contains 'Malachi Delilah'. The 'Whole Number' field is highlighted with a white border and contains the value '215'. Below it are the 'Decimal Number' field with '0.00', the 'Percent' field with '0.00%', and an empty 'Phone Number' field. The background is a light gray.

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



A screenshot of a form interface. The 'Name' field contains 'Malachi Delilah'. The 'Whole Number' field contains '215'. The 'Decimal Number' field is highlighted with a white border and contains the value '355.81'. Below it are the 'Percent' field with '0.00%', the 'Phone Number' field, and two radio button options labeled 'Option 1' and 'Option 2'. The background is a light gray.

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

Name: Malachi Delilah

Whole Number: 215

Decimal Number: 355.81

Percent: 52.72%

Phone Number: [Empty]

Radio:  Option 1  Option 2

Dropdown: Please select one

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

General Address Additional Info Person Notes Custom Tabs

Custom Fields

Currency: \$47.99

Date: [Empty]

Date/Time: [Empty] 12:00 AM

Day of Week: Please select a day of week

## 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.

Date: 06-12-2013

Date/Time: [Empty]

Day of Week: [Empty]

Drilldown: [Empty]

Email: [Empty]

Month: [Empty]

List Box: [Empty]

Calendar: June 2013

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

- **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.

A screenshot of a web form with several input fields. The 'Date/Time' field is set to '06-14-2013' and '12:00 AM'. A dropdown menu is open for the 'Date/Time' field, showing a list of times from 12:00 AM to 02:45 AM in 15-minute increments. The '01:15 AM' option is highlighted with a mouse cursor. Other fields include 'Day of Week' (Please select a day), 'Drilldown' (Please select a drilldown), 'Email', 'Month' (Please select a month), and a 'List Box' with options 'Option 1', 'Option 2', and 'Option 3'.

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

A screenshot of a web form similar to the first one. The 'Date/Time' field is set to '06-14-2013' and '12:00 AM'. A dropdown menu is open for the 'Day of Week' field, showing a list of days from Sunday to Saturday. The 'Monday' option is highlighted with a mouse cursor. Other fields include 'Drilldown' (Please select a day of week), 'Email', 'Month' (Please select a month), and a 'List Box' with options 'Option 2' and 'Option 3'.

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

A screenshot of a web form. The 'Month' field is set to 'May'. A dropdown menu is open for the 'Month' field, showing a list of months from January to December. The 'May' option is highlighted with a mouse cursor. Other fields include 'List Box' (Please select a month) and 'Name' (December).

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

A screenshot of a web form. The 'Year' field is set to '2015'. Above it is a dropdown menu for 'Roy Samuel Samuel not admin'. Below the 'Year' field are radio buttons for 'Yes/No' with 'No' selected. At the bottom are buttons for 'Save', 'Save & Search', 'Delete', and '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: 'Day of Week', 'Drilldown', 'Email', 'Month', and 'List Box'. The 'Drilldown' field is open, showing a list of options. The options are organized into two main categories: **Beach** and **Computer**. Under **Beach**, there are three sub-options: Sand, Water, and Shells. Under **Computer**, there are three sub-options: Monitor, Hard Drive, and CPU. The 'Water' option is currently selected and highlighted in blue.

- **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.

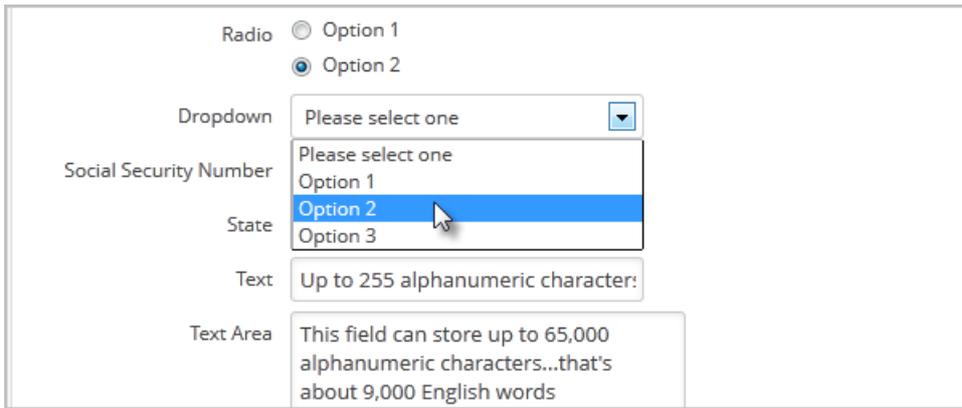
The screenshot shows a form with a 'Month' dropdown menu set to 'May' and a 'List Box' field. The 'List Box' is open, showing a list of three options: Option 1, Option 2, and Option 3. The 'Option 3' is currently selected and highlighted in blue. Below the list box, there is a 'Name' text input field containing the text 'Malachi Delilah'.

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

The screenshot shows a form with several fields: 'Decimal Number' (333.81), 'Percent' (52.72%), 'Phone Number', 'Radio', 'Dropdown', 'Social Security Number', and 'State'. The 'Radio' field has two options: 'Option 1' and 'Option 2'. The 'Option 2' radio button is selected. The 'Dropdown' field is set to 'Please select one'.

- **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

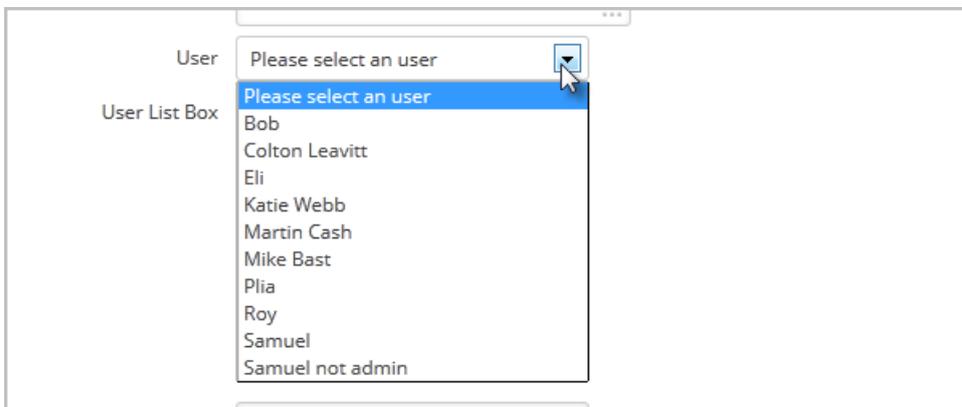
Social Security Number Please select one

State 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

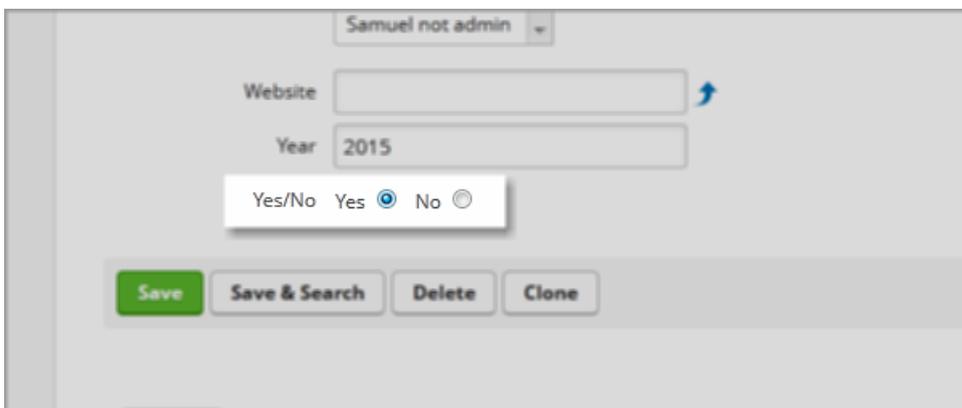
- **User:** Lists the names of your Infusionsoft users. This can be used to merge in multiple user's names into email messages (i.e. sales rep and account manager.)



User Please select an user

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 2015

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: 06-14-2013 12:00 AM  
 Day of Week: Please select a day of week  
 Drilldown: Please select a drilldown  
 Email: dignissim.tempor.arcu@in.edu  
 Status: Unconfirmed [Manage Email Status...](#)  
 Month: May  
 List Box: Option 1, Option 2, Option 3

- **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:** Converts a number to the U.S. Social Security number format - XXX-XX-XXX. The Social Security number field is encrypted. After the number is added, your users will only be able to view the last 4 digits.

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

- **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