Custom Fields

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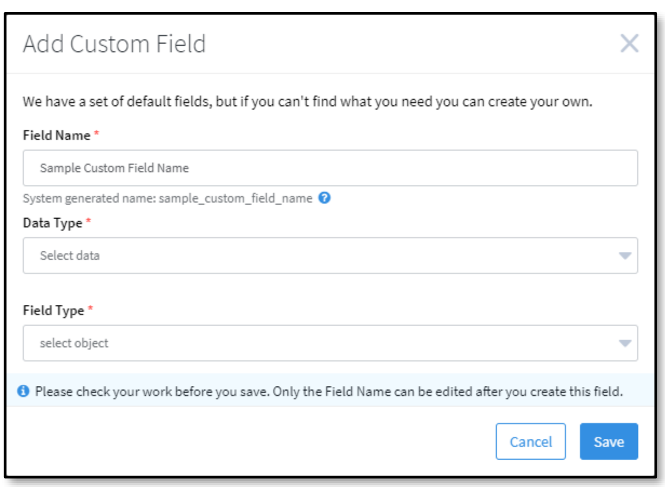
Overview

Administrators can create custom fields that can be used by anyone throughout their organization to filter their contact list, build audiences in campaigns, and as criteria in journey components—just as they would use standard fields.

Data can be inserted into custom fields using API calls or the data importer feature. Users cannot insert data into custom fields directly via the UI, unless the field is specifically configured to allow editing.

Creating a New Custom Field

1. Navigate to **Organization Admin → Custom Fields**. This page lists all the custom fields created on this page by anyone in your organization.
2. Click the **+Add Field** button.
3. In the Add Custom Field box:
    a. In the **Field Name** field, enter a succinct name for your custom field. This will be shown in the UI anywhere the field is available.
    A system name is generated automatically based on this name and displayed below this field; you cannot change the system name. You can use the system name when importing data with TE's data importer feature or API, or as part of a variable name for a content placeholder.



b. Select a **Data Type** from the drop-down list. This should reflect the type of data the field will contain. TE will use this format when writing any data to this field in the database. Options are:
   i. **Text** – Any freely typed text, stored as a text string.
   ii. **Datetime** – Both a date and a time in a single field, stored as YYYY-MM-DD HH:MM:SS.
   iii. **Date** – Stores a date only, stored as YYYY-MM-DD.
   iv. **Boolean** – Either 0 for false or 1 for true.
   v. **Number (Integer)** – Any whole number (no fractions or places to the right of the decimal point).
   vi. **Number (Decimal)** – Any number, which might or might not include places to the right of the decimal point.

c. Select a **Field Type** from the drop-down list. This determines which type of record the custom field should be attached to. Options are:
   i. **Contact** – A person, such as a borrower, whose information is stored in TE and displayed on the contact list.
      - If you select this option, a **Show this field on the Contact Details page** checkbox appears below. Check this option if you want the field to be displayed along with the standard fields on a contact details page in the UI.
      - If you check that option, an **Allow editing of this field on the Contact Details page** checkbox becomes available. Check this option to give end users the ability to modify the information stored in this field directly from the contact details page. If this remains unchecked, the data can only be modified via the API or an import job.

Note
As with standard fields, a custom field is only shown on the contact details page for a given contact if that contact has something stored in that field.
However, if the field is configured to allow the user to edit its contents, the user can add information to a blank field from the contact details page.

   ii. **Loan** – A loan transaction stored in TE and associated with 1 or more contacts.
      - If you select this option, the additional field **Account Classification** appears, and you must select an option (such as Mortgage, Vehicle Loans, or Personal Loans) from this drop-down list to allow TE to display the information in your custom field with the associated type of loan.
      - Also if you select this option, a **Show this field on the Loan Details page** checkbox appears. Check this option if you want the field to be displayed along with the standard fields on a loan details page in the UI.

Note
The Contact and Loan options are available to all users with access to create custom fields. The remaining options are controlled by permission.

   iii. **User** – A user of the TE platform associated with your organization.
   iv. **Account** – A type of financial product associated with a contact.
      - If you select this option, the additional field **Account Classification** appears, and you must select an option (such as Checking Accounts, Credit Cards, or Certificates of

Deposit) from this drop-down list to allow TE to display the information in your custom field with the associated type of account.
    d. Click the **Save** button. All items are required and must be filled out before you can save.

Warning
Once a custom field is created, you have limited ability to edit the definition of that field. Double-check that your selections are correct in the Add Custom Field box before saving.

The new field is added to the table on the current page, including all the options you selected.

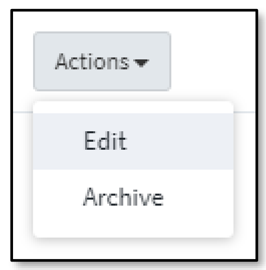
Managing Custom Fields

Editing

Once a custom field is created, the only changes you can make are:

- the name
- (if the Type is Contact) whether the field is shown on the contact details page
- (if the Type is Contact and the field is shown on the contact details page) whether the field's contents are editable by an end user

To edit the definition of a field:



1. Navigate to **Organization Admin → Custom Fields**.
2. For the field you want to edit, select **Actions → Edit**.
3. In the Edit Custom Field box, note that some options cannot be changed. You can:
    a. Modify the entry in the **Field Name** box. Note that updating this does *not* change the System Name that was generated when you created the field.
    b. Check or uncheck the **Show this field on the Contact Details page** option.
    c. Check or uncheck the **Allow editing of this field on the Contact Details page** option.
    d. Click the **Save** button to confirm your changes.

Archiving/Unarchiving

If you no longer want a custom field to be available, you can archive it. You cannot delete the field; any information that was stored in the field is still available to query and is not lost if you unarchive the field later.

To archive a field:

1. Navigate to **Organization Admin → Custom Fields**.
2. For the field you want to edit, select **Actions → Archive**.
3. In the confirmation box, click the **Confirm** button.

The field is still listed in the table, with the value Yes displayed in the Archived column. If the field had been configured to show on the contact details page, it is no longer shown there.

To unarchive a field, select **Actions → Unarchive** and click the **Confirm** button. If the field had been configured to show on the contact details page, it is shown there again. Any information stored in the field is retained and displayed as usual.