

# Choose Custom Field Types

This article applies to:

You can add up to 150 custom fields per record type in Max Classic (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 Keap 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.

- **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.

Name Malachi Delilah

Whole Number 215

Decimal Number 0.00

Percent 0.00%

Phone Number

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

Name Malachi Delilah

Whole Number 215

Decimal Number 355.81

Percent 0.00%

Phone Number

Radio  Option 1  
 Option 2

- **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

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

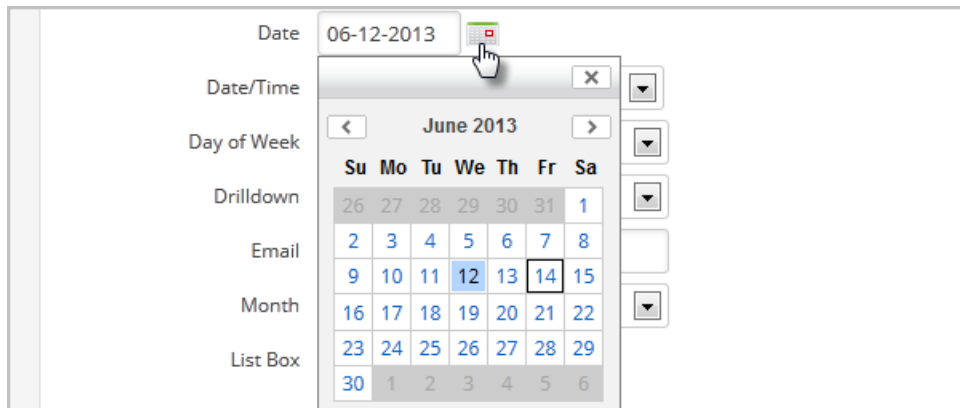
Date/Time 12:00 AM

Day of Week Please select a day of week

## Date Fields

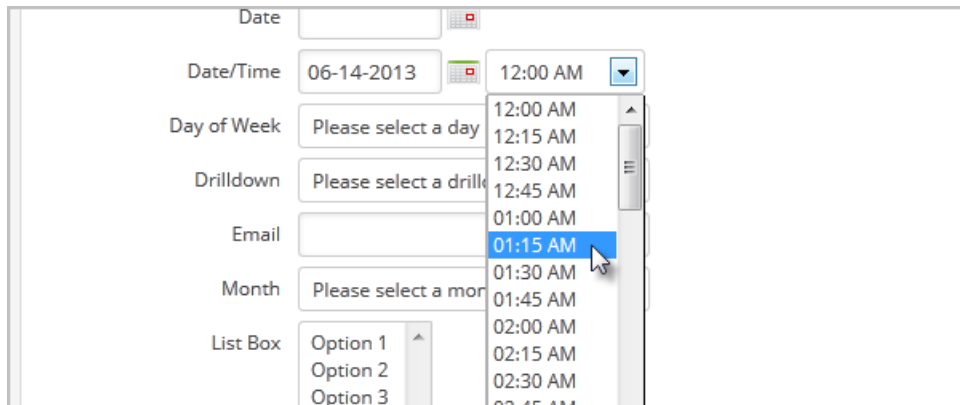
Use date fields to store custom date information like birthdays, special events, renewal dates, etc. The dates can be merged into emails, letters, and task templates to personalize them and to use them as event reminders.

- **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.

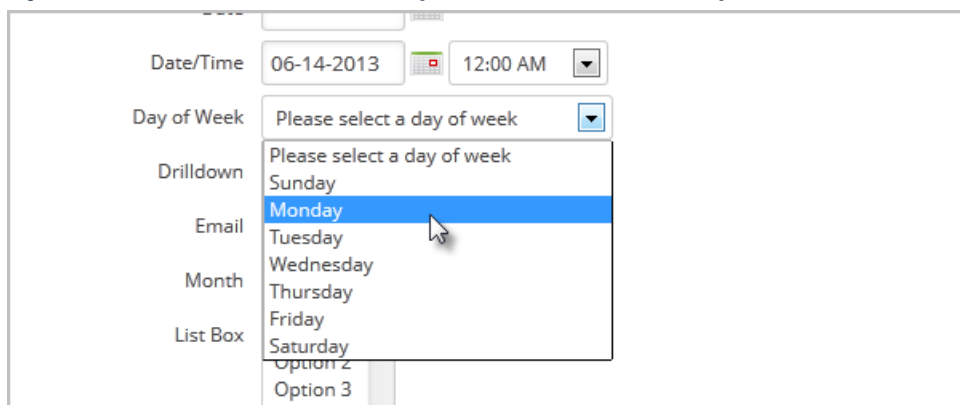


- **Date and Time:** Stores a custom date and time that can be merged into follow-up email, letter, and task templates. It is also used to schedule steps within a sequence.

The time zones used for custom fields will always be in EST.



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



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

A screenshot of a web form field labeled "Month". The field contains a dropdown menu with "May" selected. Below the dropdown is a list box containing the following items: "Please select a month", "January", "February", "March", "April", "May", "June", "July", "August", "September", "October", "November", and "December". A mouse cursor is pointing at "May".

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

A screenshot of a web form. At the top, there is a dropdown menu with "Roy", "Samuel", and "Samuel not admin" as options. Below it is a "Website" text input field with a blue arrow icon to its right. Underneath is a "Year" text input field containing "2015". Below the "Year" field are "Yes/No" radio buttons, with "Yes" unselected and "No" selected. At the bottom of the form are four buttons: "Save" (green), "Save & Search", "Delete", and "Clone".

## Option Lists

Use option list fields to create solid criteria for searching and reporting in Keap. 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.

A screenshot of a web form showing a "Drilldown" field. The dropdown menu is open, displaying a hierarchical list of options. The first category is "Beach" (bolded), with sub-items "Sand", "Water", and "Shells". The second category is "Computer" (bolded), with sub-items "Monitor", "Hard Drive", and "CPU". A mouse cursor is pointing at "Water", which is highlighted in blue.

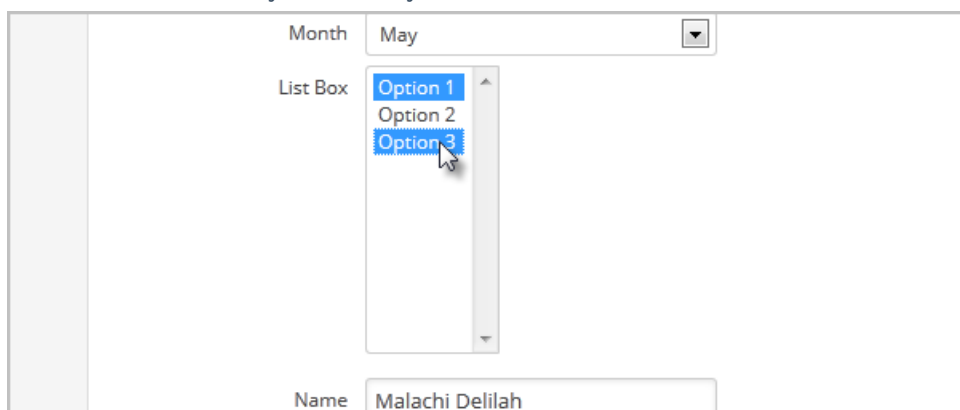
After naming and saving the drill-down field, you will have the option to **configure** it.



In this example, there are two categories, "Beach" and "Computer" with options underneath them.



- **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.



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

Decimal Number: 333.81

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 Keap 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

## 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

Decimal Number

Percent

Phone Number

Radio  Option 1  
 Option 2

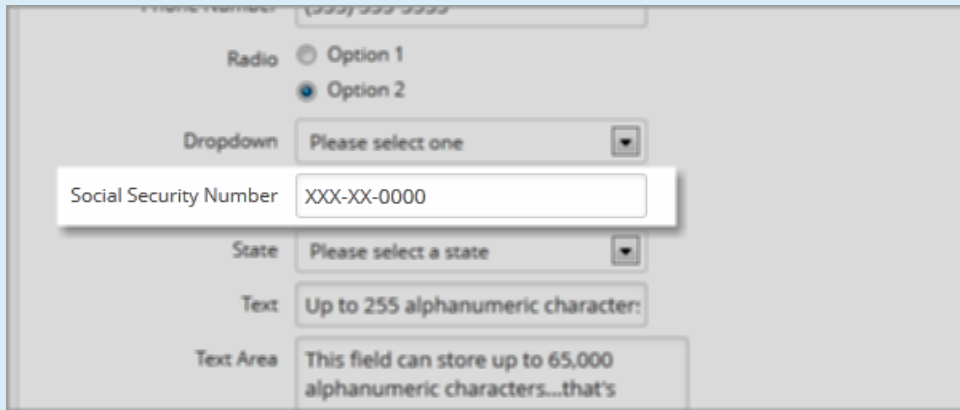
Dropdown

Social Security Number

- **Social Security Number (SSN):** 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



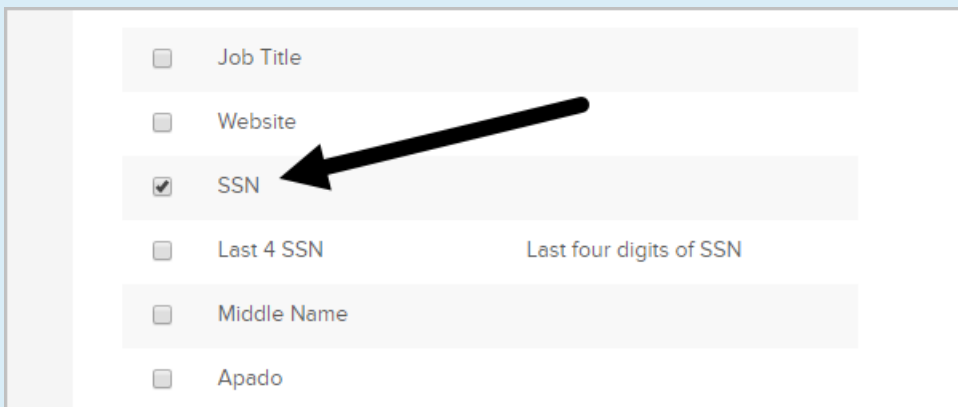
able to view the last 4 digits as shown in the image below.



The image shows a contact record form with the following fields:

- Radio: Option 1 (unselected), Option 2 (selected)
- 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

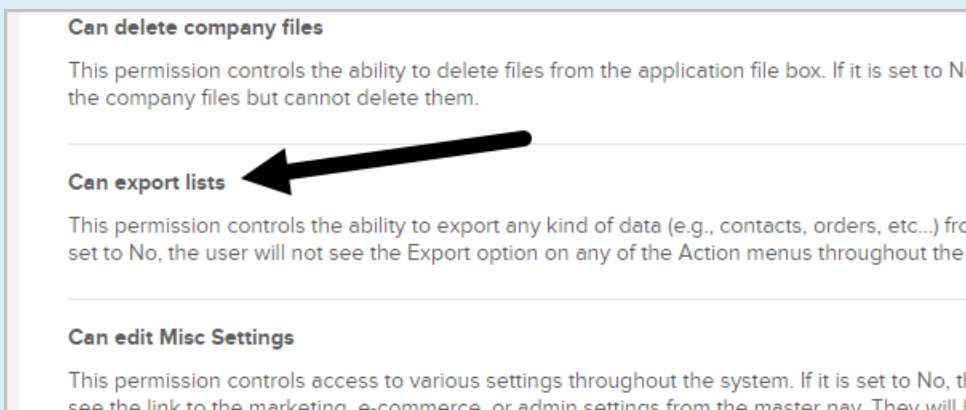
**Important Note!** The only way to export the full SSN is to run a [contact export](#) and choose the **SSN** field.



The image shows a contact export selection screen with the following options:

- 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.



The image shows a permissions page with the following sections:

- 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 can view the company files but cannot delete them.
- Can export lists** (highlighted with an arrow)  
This permission controls the ability to export any kind of data (e.g., contacts, orders, etc...) from the system. If it is set to No, the user will not see the Export option on any of the Action menus throughout the system.
- 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 via the URL.

- **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  
Pliia  
Roy  
Samuel  
Samuel not admin

Website

Year

Yes/No Yes  No

Save Save & Search Delete Close

**Note:** Only the **website** field type can be used to merge a URL into an email. Saving a URL to any other custom field type and attempting to merge that value into an email will result in a [Liquid syntax](#) error.