Choose Custom Field Types

This article applies to:

[Max Classic](#)

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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.
- **Decimal Number**: Stores decimal numbers. It will not accept letters or symbols. The decimal will round to the hundredths.
- **Percent**: Stores any number, but displays it with a decimal point and a percentage (%).
- **Currency**: Stores any number, but displays it with a decimal point and a dollar sign ($).

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

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
  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. *Note: List Box custom fields are* **not** *supported in Landing Pages.*
- **Radio**: Creates radio button options that all display at once. Only one option can be selected at a time.
- **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.
- **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.)
- **Yes / No**: This is a radio field that only has 2 options: *Yes* or *No*.

Specially Formatted Contact Fields

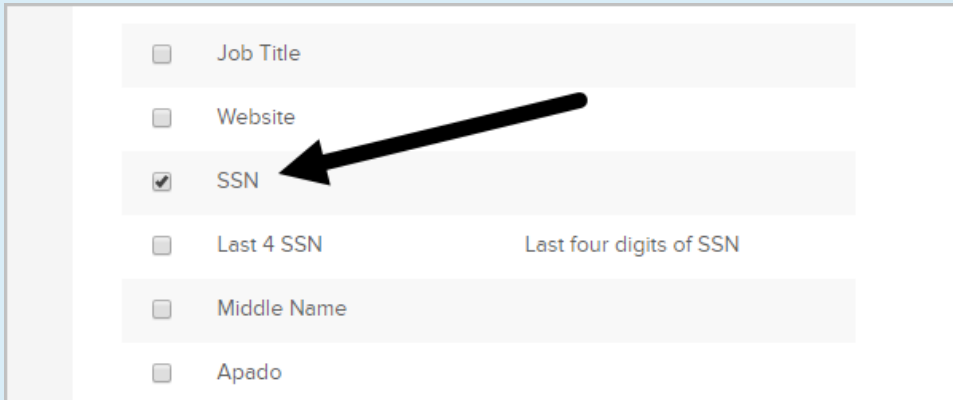Use the specially formatted contact to expand the number of standard contact fields.

- **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.
- **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.

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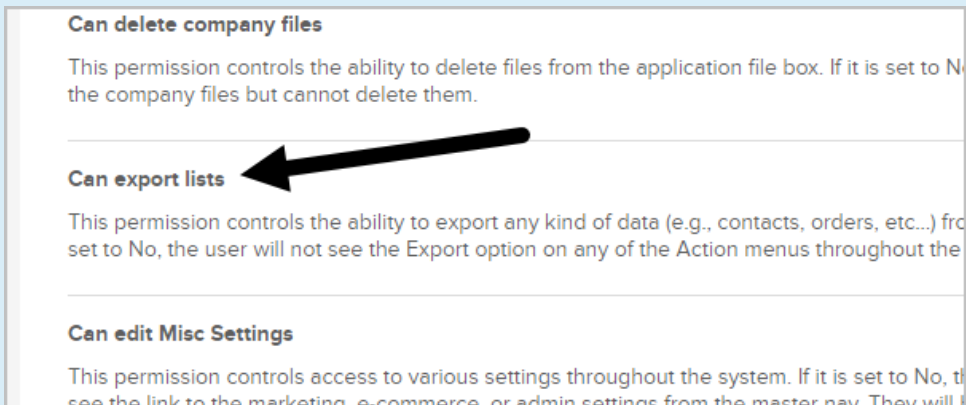
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  Important Note! The only way to export the full SSN is to run a contact export and choose the **SSN** field.

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

- **State**: Creates a U.S. state drop-down in the contact record.
- **Website**: Converts a website address into a hyperlink for one-click access to the website listed. The hyperlink works with or without *http://*.

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.