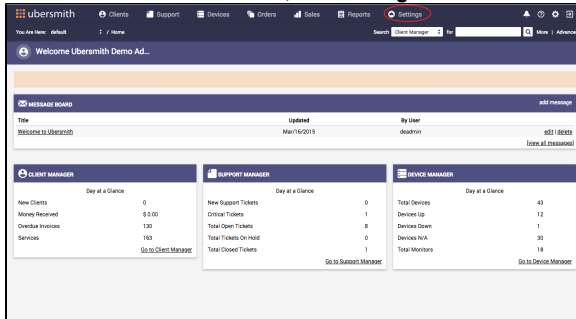


Adding Custom Client Fields

Custom client fields extend the information available to be stored for clients, beyond the general system fields. You will first need to add a custom client field group, as a higher-level category, then add custom fields to the corresponding group in which they belong.

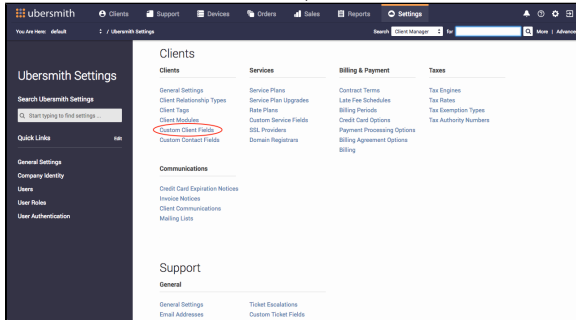
Accessing the Custom Client Fields Page

1. From the *Ubersmith Dashboard*, click **Settings**.



The *Ubersmith Settings* page appears.

2. From the *Clients – Clients* section, click **Custom Client Fields**.

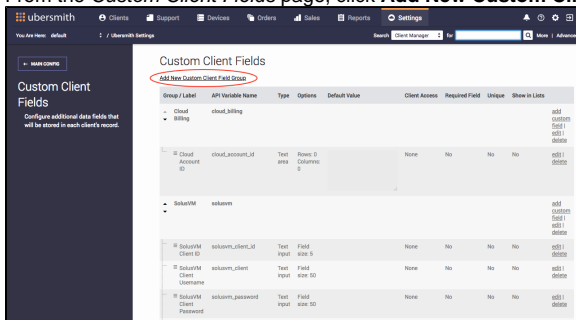


The *Custom Client Fields* page appears.

Complete the Add Custom Field Group Page.

A custom client field group is a higher-level category that contains associated custom fields to be applied to clients.

1. From the *Custom Client Fields* page, click **Add New Custom Client Field Groups**.



The *Add Custom Field Group* page appears.

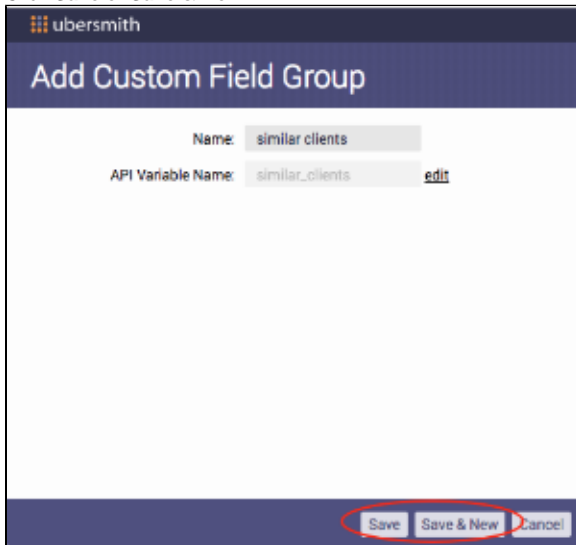
2. In the **Name** field, enter the name of the group you want to display on the *Custom Client Fields* page.
3. In the **API Variable Name** field, click **edit** and enter the corresponding API name for the custom client field group, if you want the API variable name to be different from the system-generated name.

On this page:

On this page:

- [Accessing the Custom Client Fields Page](#)
- [Complete the Add Custom Field Group Page.](#)
- [Complete the Add Custom Field Page](#)
 - [Text Input](#)
 - [Select Box](#)
 - [Multiple Select Box](#)
 - [Text Area](#)
 - [Check Box](#)
 - [Date](#)
 - [Related Topics](#)

4. Click **Save** or **Save & New**.



Complete the Add Custom Field Page

Once a custom field group has been created, individual custom fields can be created in order to assign them to associated clients. This page provides the means for custom fields to display on the *Add New Client* page or *Edit Client* page in the *Custom Fields* tab.

1. From the *Custom Clients* page, click **add custom field**. The *Add Custom Field* page appears.



Note

The fields in this tab change based on the selected value in the **Type** field.

2. In the **Label** field, enter the name to display for the custom field.
3. In the **Type** field, select the type of expected input information for the custom field; either a select box, multiple select box, text area, check box, or date.

Text Input

- a. In the **Field Size** field, enter the number of digits to define the size of the custom field.
- b. In the **Default Value** field, enter the default value to display in the custom field.
- c. In the **Regular Expression Match** field, enter the rule for the data that will get entered in the custom field.
- d. In the **Regular Express Help Text** field, enter the message that will be shown to the user about the regular expression match.

Select Box

- a. In the **Enter possible values on separate lines** field, enter the available selection choices.
- b. In the **Default Value** field, enter the default value to display in the custom field.

Multiple Select Box

- a. In the **Enter possible values on separate lines** field, enter the available selection choices.
- b. In the **Default Value** field, enter the default values to display in the custom field.

Text Area

- a. In the **Rows** field, enter the number of rows the text area should contain.
- b. In the **Columns** field, enter the number of columns the text area should contain.
- c. In the **Default Value** field, enter the default value to display in the custom field.

Check Box

- In the **Default Value** field, either select or leave blank to have the custom field be checked or blank.

Date

- In the **Default Value** field, enter the date to display in the custom field.

4. In the **API Variable Name** field, enter the name to be used as the API variable name. Clicking **edit** enables the field to be change.
5. In the **Group** field, select the associated custom client field group for this field.
6. In the **Client Access** field, select either none, view, or edit to configure the level of access the client will have from the Client Portal.



Note

The **Client Access** field enables you to configure your client's access for their account in the *Client Portal*.

7. In the **Required** field, select this field if the custom field will be required to be completed.
8. In the **Unique** field, select this field if the custom field should be unique across all custom field values of this type.
9. In the **Show In Lists** field, select either **No** or **Position 1** through **Position 5**, to configure where the field will display in the *Client Profile* page.

ubersmith

Add Custom Field

Label:

Type:

Default Value: ☐

API Variable Name: [edit](#)

Group:

Client Access:

Required?: ☐

Unique?: ☐ ⓘ

Show In Lists:

Related Topics

[Managing Custom Client Fields](#)