

Contactually 101: Step 5..... Set up some custom fields (for data geeks)

I like lots of data so I have set my Contactually to keep some information in custom fields. This is information I find handy to have, but I can also use it in email templates by adding the custom fields into those templates. To add custom fields, go into Settings under your picture in the upper right corner. Custom Fields is about halfway down on the list on the left. You can add any custom field you want, but these are the ones I recommend.

Salutation	Drop Down	Mr. Ms. Mrs. Miss. Dr.
Spouse Full Name	Text Area	
Spouse First Name	Text Area	
Spouse Last Name	Text Area	
Children	Text Area	
Childrens' First Names	Text Area	
Other Relatives	Text Area	
Pets with Description	Text Area	
Pets' Names	Text Area	
Referred By	Text Area	
Referred By For Merge	Text Area	
Referred To	Text Area	
Referred To For Merge	Text Area	
Description	Text Area	
New Home Anniversary	Text Area	
Source	Text Area	