

# CUSTOM FIELDS & VALUES

Single Line      Multi Line      Text Box List

Number      Phone      Monetary

Choosing Options

Dropdown (Single)      Dropdown ( multiple )      Radio Select

Checkbox      Date Picker

Others

File Upload      Signature

S

01

### CONTACT FIELDS

These fields pull from any standard or custom field in a contact record. You can use these to customize messaging, personalize feel, relay data, etc

T

02

### USER FIELDS

These fields pull data from the contact's assigned user. You can use these fields for customizing signature, contact info, etc.

Z

03

### APPOINTMENT FIELDS

These fields pull data from a contact's upcoming appointment details. You can use these fields for reminders, follow up, etc.

E

T

04

### ACCOUNT FIELDS

These fields pull from your account settings & data. You can use these fields to customize templates with account name, address, etc.

Z

05

### CURRENT TIME FIELDS

These fields pull from the time at which it is populated. You can use these fields for updating subscription dates, registration date, etc.

O

C

06

### ATTRIBUTION FIELDS

These fields pull from the contact's data, specifically how they entered your CRM

# INTRO

## CUSTOM FIELDS

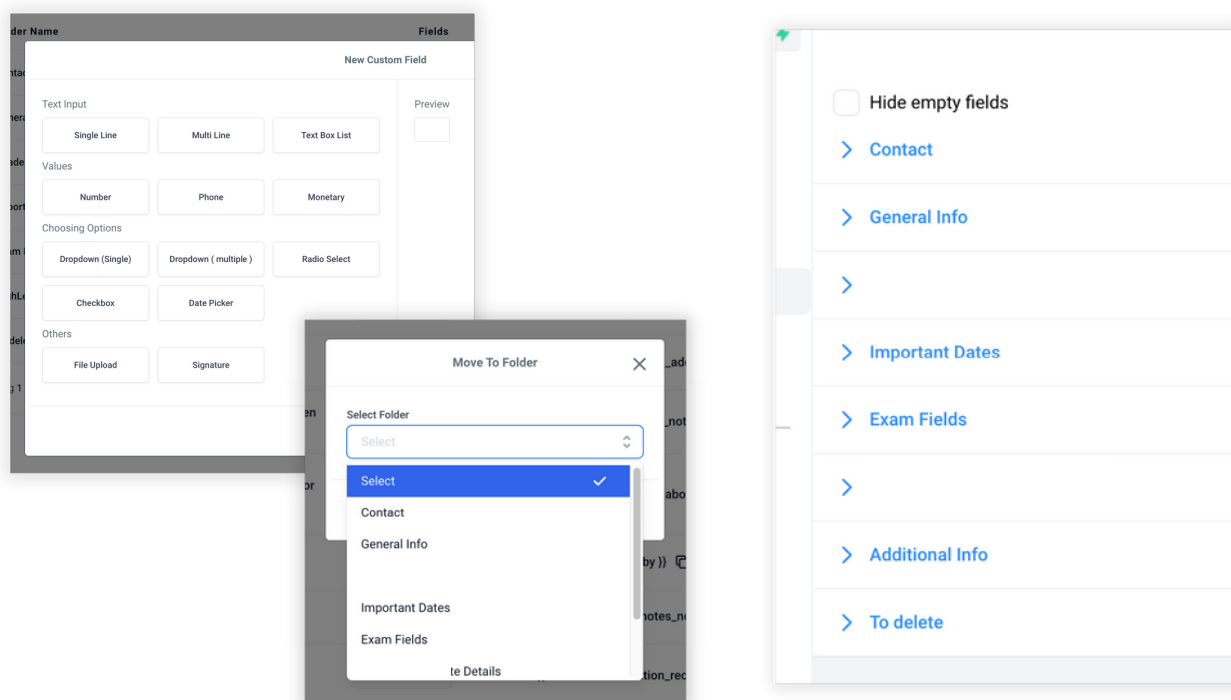
Each contact in your account has their own email, information, data, or files that are custom to them. That's why we have custom fields, to allow you to create any field you want for collecting data from your contacts.

### Custom Field

A field that captures information about the contact individually

### Custom Value

A predetermined field for your account that can be pulled into messaging such as an unsubscribe link



Create your field how you wish, organize your fields into folders of your choice to easily find them later in the contact record. You can set the order of your folders so you know exactly where the information you are looking for is.

# 01

## CONTACT FIELDS

Custom Field	Populates
{{contact.name}}	The contacts full name
{{contact.first_name}}	The contacts first name only
{{contact.last_name}}	The contacts last name only
{{contact.email}}	The contacts email address
{{contact.phone}}	The contacts phone number
{{contact.company_name}}	The contacts company name
{{contact.full_address}}	The contacts entire address
{{contact.address1}}	The contacts street address
{{contact.city}}	The contacts city
{{contact.state}}	The contacts state
{{contact.country}}	The contacts country
{{contact.postal_code}}	The contacts zip code
{{contact.timezone}}	The contacts timezone
{{contact.date_of_birth}}	The contacts birthday
{{contact.source}}	The contacts entry point into your CRM
{{contact.website}}	The contacts website link
{{contact.id}}	The contacts identification number in your CRM
{{message.body}}	The contacts replied message content



# 02

## USER FIELDS

Custom Field	Populates
{{user.name}}	The assigned users first and last name
{{user.first_name}}	The assigned users first name only
{{user.last_name}}	The assigned users last name only
{{user.email}}	The assigned users email address
{{user.phone}}	The assigned users phone number
{{user.email_signature}}	The assigned users signature (settings – profile)
{{user.calendar_link}}	The assigned users calendar link
{{user.twilio_phone_number}}	The assigned users phone number (settings – my staff – edit user – call & voicemail settings – select inbound phone number)



# 03

## APPOINTMENT FIELDS

Custom Field	Populates
{{appointment.title}}	The appointments title (settings – calendars – edit service)
{{appointment.start_time}}	The appointments start date & time
{{appointment.only_start_date}}	The appointments start date only
{{appointment.only_start_time}}	The appointments start time only
{{appointment.end_time}}	The appointments end date & time
{{appointment.only_end_date}}	The appointments end date only
{{appointment.only_end_time}}	The appointments end time only
{{appointment.timezone}}	The appointments timezone
{{appointment.cancellation_link}}	The link to cancel the appointment
{{appointment.reschedule_link}}	The link to reschedule the appointment
{{appointment.meeting_location}}	The link/address to join the meeting (settings – profile)
{{appointment.notes}}	The notes added to the appointment
{{appointment.add_to_google_calendar}}	The link to add the appointment to a google calendar
{{appointment.add_to_ical_outlook}}	The link to add the appointment to an iCal or Outlook calendar
{{calendar.name}}	The appointment’s calendar name
{{appointment.user.name}}	The appointment users full name
{{appointment.user.first_name}}	The appointment users first name only
{{appointment.user.last_name}}	The appointment users last name only
{{appointment.user.email}}	The appointment users email address
{{appointment.user.phone}}	The appointment users phone #
{{appointment.user.email_signature}}	The appointment users email signature (settings – profile)
{{appointment.user.twilio_phone_number}}	The appointment users twilio phone #



# 04

## ACCOUNT FIELDS

Custom Field	Populates
{{location.name}}	The accounts name
{{location.full_address}}	The accounts entire address
{{location.address}}	The accounts street address
{{location.city}}	The accounts city location
{{location.state}}	The accounts state location
{{location.country}}	The accounts country location
{{location.postal_code}}	The accounts location zip code
{{location.email}}	The accounts company email address
{{location.phone}}	The accounts company phone number
{{location.website}}	The accounts company website link
{{location.logo_url}}	The upload link of the accounts logo image
{{location_owner.first_name}}	The account owner's first name
{{location_owner.last_name}}	The account owner's last name
{{location_owner.email}}	The account owner's email address
{{location.id}}	The account identification number



# 05

## TIME FIELDS

Custom Field	Populates
{{right_now.second}}	The exact second of when that custom field is populated
{{right_now.minute}}	The exact minute of when that custom field is populated
{{right_now.hour}}	The exact hour of when populated in a 24 hour format
{{right_now.hour_ampm}}	The exact hour of when populated in an AM/PM hour format
{{right_now.time}}	The exact time of when populated in a 24 hour format
{{right_now.time_ampm}}	The exact time of when populated in an AM/PM hour format
{{right_now.ampm}}	The exact time of when populated in an AM/PM hour format
{{right_now.day}}	The current day when populated
{{right_now.day_of_week}}	The current day of the week name when populated
{{right_now.month}}	The current month when populated
{{right_now.month_english}}	The current month name when populated
{{right_now.year}}	The current year when populated
{{right_now.middle_endian_date}}	The current date when populated in a Month/Day/Year format
{{right_now.little_endian_date}}	The current date when populated in a Day/Month/Year format
{{right_now.second}}	The exact second of when that custom field is populated

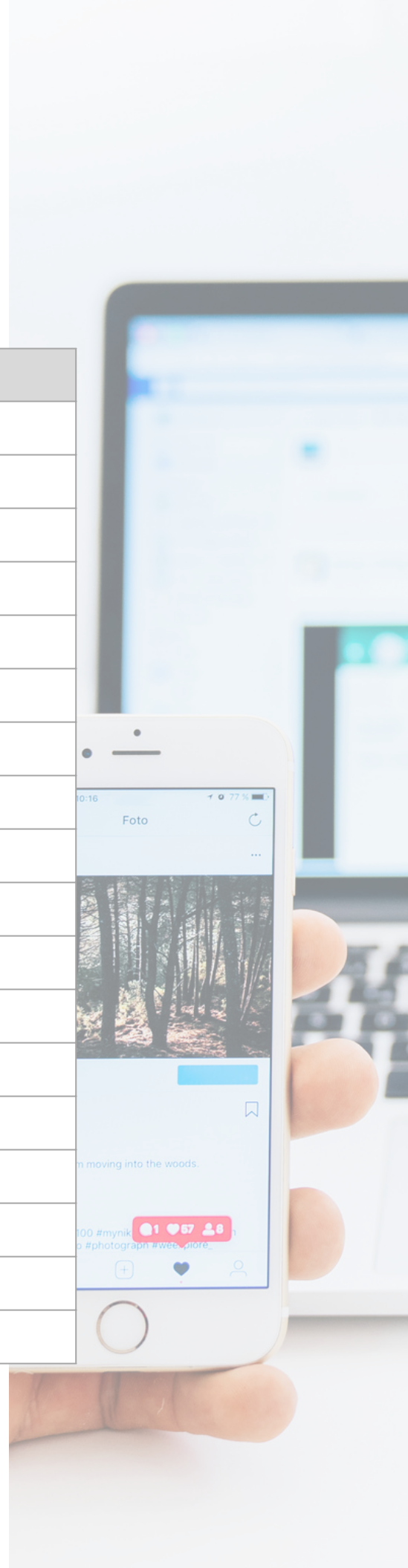




# 06

## ATTRIBUTION FIELDS

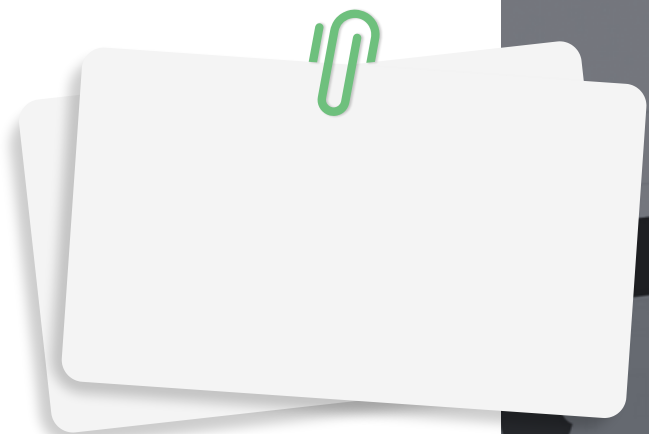
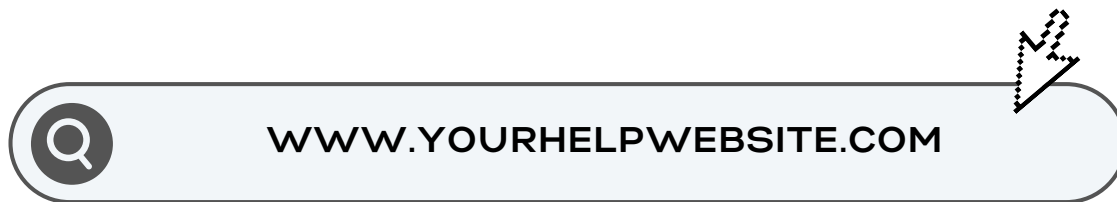
Custom Field	Populates
{{contact.attributionSource.sessionSource}}	Session source of first attribution
{{contact.attributionSource.campaign}}	Campaign of first attribution
{{contact.attributionSource.utmSource}}	UTM source of first attribution
{{contact.attributionSource.utmMedium}}	UTM medium of first attribution
{{contact.attributionSource.utmContent}}	UTM content of first attribution
{{contact.attributionSource.referrer}}	Referrer of first attribution
{{contact.attributionSource.campaignId}}	Campaign ID of first attribution
{{contact.attributionSource.fbclid}}	FB click ID of first attribution
{{contact.attributionSource.gclid}}	Google click ID of first attribution
{{contact.lastAttributionSource.sessionSource}}	Session source of latest attribution
{{contact.lastAttributionSource.campaign}}	Campaign of latest attribution
{{contact.lastAttributionSource.utmSource}}	UTM source of latest attribution
{{contact.lastAttributionSource.utmMedium}}	UTM medium of latest attribution
{{contact.lastAttributionSource.utmContent}}	UTM content of latest attribution
{{contact.lastAttributionSource.referrer}}	Referrer of latest attribution
{{contact.lastAttributionSource.campaignId}}	Campaign ID of latest attribution
{{contact.lastAttributionSource.fbclid}}	FB click ID of latest attribution
{{contact.lastAttributionSource.gclid}}	Google click ID of latest attribution



# NEED MORE HELP?

## CHECKOUT OUR SUPPORT OPTIONS & RESOURCES

Our team is fully dedicated to supporting you every step of the way, ensuring your success. You can review the wide range of resources and support options available to guide you through any challenges or inquiries. Don't hesitate to reach out to our team whenever you need additional assistance; we're always here to help!



ALL INFORMATION IS SUBJECT TO CHANGE AS THE SOFTWARE UPDATES AND GROWS. NEW VERSIONS OF THIS WORKBOOK WILL BE EDITED FOR UPDATES AND NEW FEATURES.

