CUSTOM
FIELDS & VALUES

| ...ngle Line | Multi Line | Text Box List |
| Number | Phone | Monetary |

Choosing Options

| Dropdown (Single) | Dropdown (multiple) | Radio Select |
| Checkbox | Date Picker | |

Others

| File Upload | Signature | |

CONTENTS

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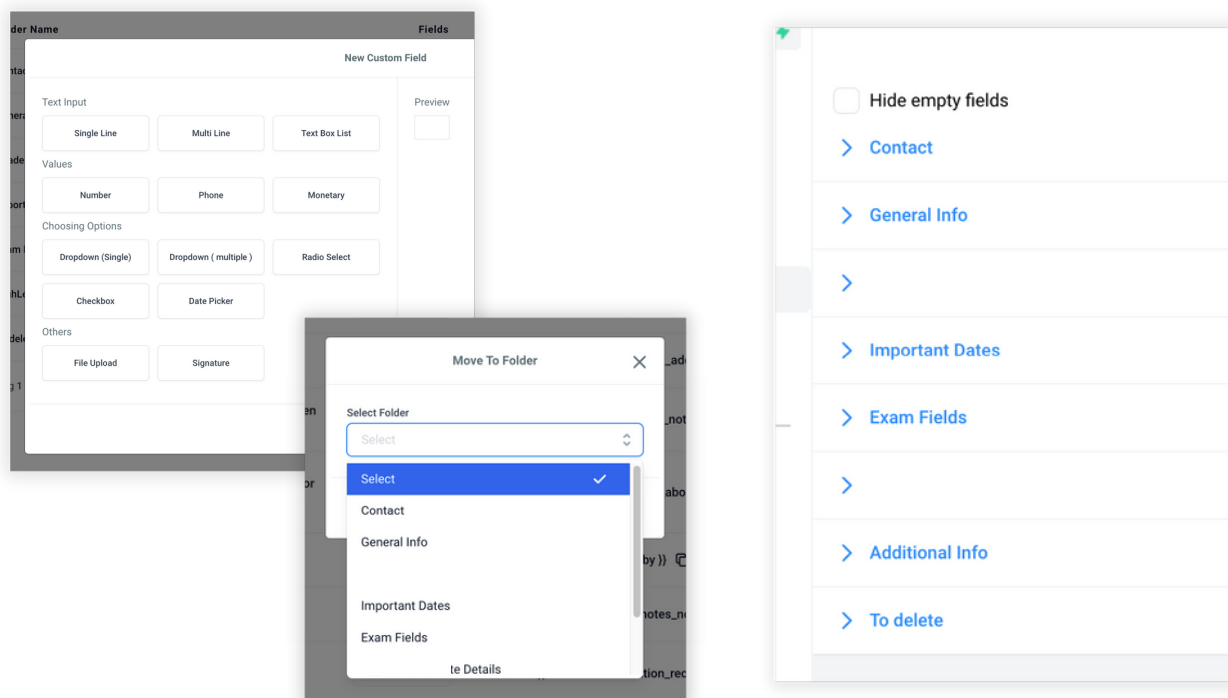
Create your field how you wish, organize your fields into folders of your choice to easily find them later in the contact record. You can set the order of your folders so you know exactly where the information you are looking for is.

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 twillio 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

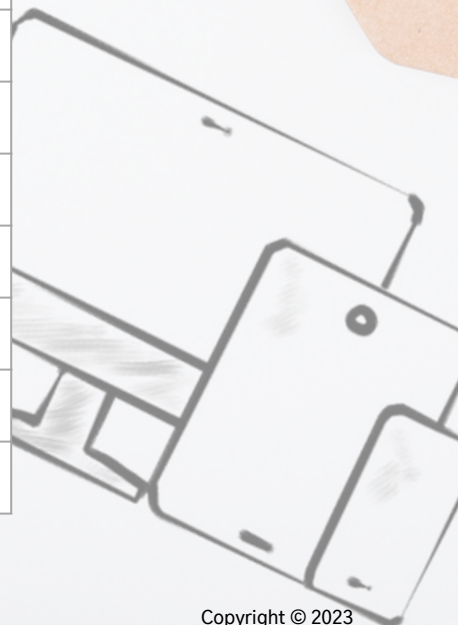| Custom Field	Populates
{{right_now.second}}	The exact second of when that custom field is populated
{{right_now.minute}}	The exact minute of when that custom field is populated
{{right_now.hour}}	The exact hour of when populated in a 24 hour format
{{right_now.hour_ampm}}	The exact hour of when populated 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

07

MEMBERSHIP FIELDS

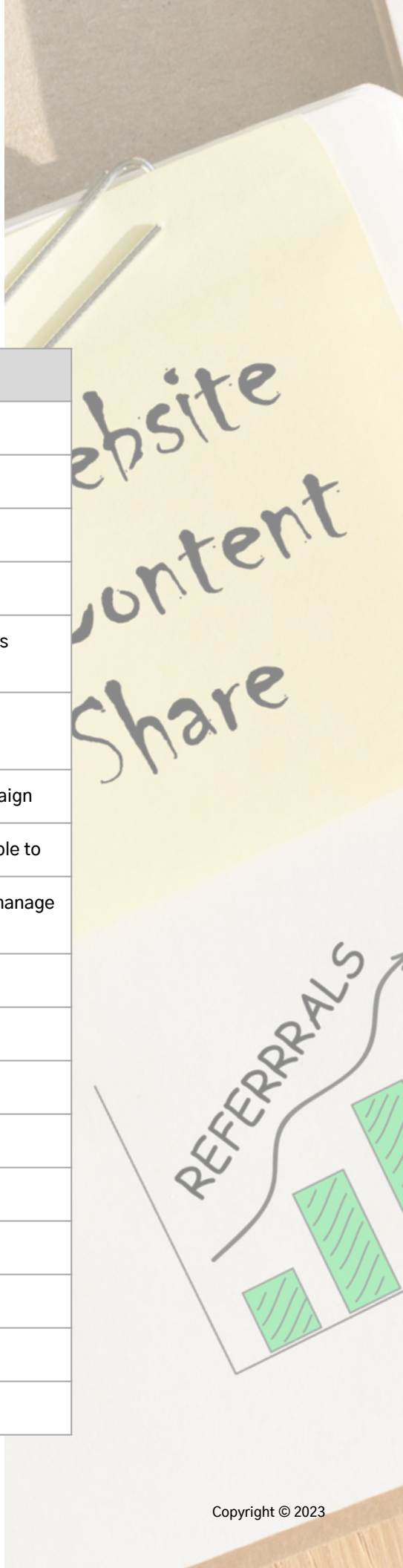| Custom Field	Populates
{{membership_contact.email}}	The email address the contact used to register
{{membership_contact.login_url}}	The link to login to your account's membership portal
{{membership_contact.offer_title}}	The name of the offer the contact registered for
{{membership_contact.category_url}}	The link to a specific module in a course
{{membership_contact.product_title}}	The name of the course the contact registered for
{{membership_contact.category_title}}	The name of a specific module within a course
{{membership_contact.support_email}}	The address set as the support resource within your membership site settings
{{membership_contact.support_phone}}	The number set as the support resource within your membership site settings
{{membership_contact.site_name}}	The name of your account's membership portal

08

SHOPIFY FIELDS

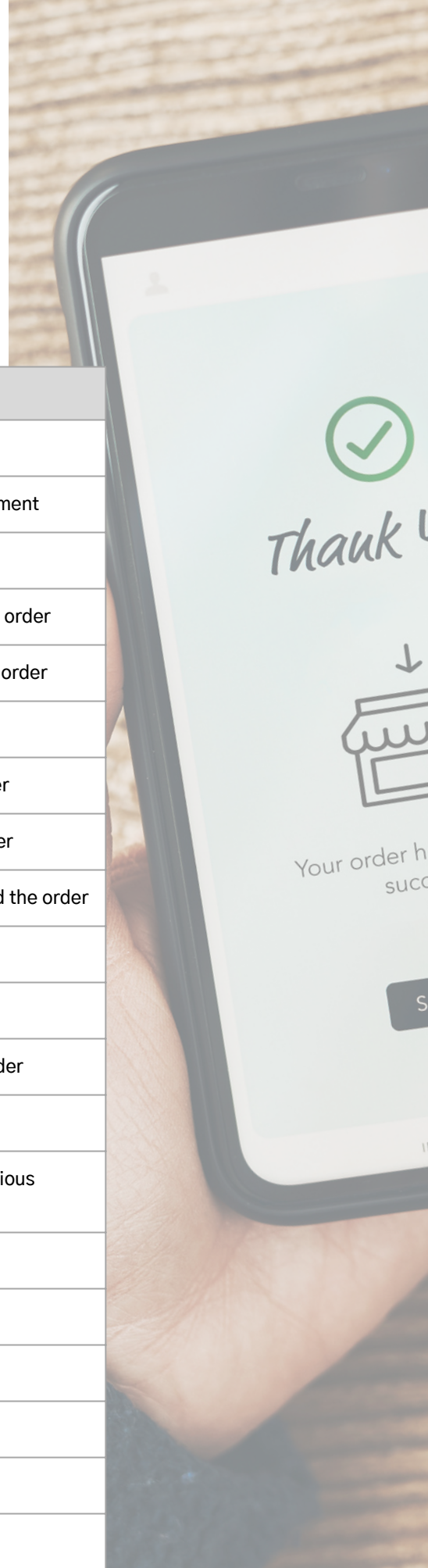| Custom Field	Populates
{{order.number}}	The ID number associated with the order submitted
{{order.created_on}}	The date the order was submitted
{{order.customer.first_name}}	The first name of the contact that ordered
{{order.customer.last_name}}	The last name of the contact that ordered
{{order.customer.email}}	The email address of the contact that ordered
{{order.customer.phone}}	The phone number of the contact that ordered
{{order.total_discounts}}	The total amount discounted on the order
{{order.discount_code}}	The discount code used on the order
{{order.total_price}}	The cumulative cost of the whole order
{{order.subtotal_price}}	The cost of the order before discounts or taxes
{{order.total_shipping_price}}	The cost of physical delivery of the order
{{order.total_cart_price}}	The cumulative cost of all items in shopping cart
{{order.order_status_url}}	Link to view shipping or processing status of the order
{{order.abandoned_checkout_url}}	The URL link if someone exits before submitting an order
{{order.shipping_address}}	The physical address the order needs to deliver to
{{order.billing_address}}	Physical address associated with the payment method
{{order.has_discount}}	Did this order use a discount of any kind?
{{order.currency_code}}	The type of currency symbol ($)
{{order.currency}}	The form of payment currency (US Dollar)
{{order.requires_shipping}}	Does this order need something delivered?

09

AFFILIATE FIELDS

Custom Field	Populates
{{affiliate.name}}	Full name of the affiliate contact
{{affiliate.first_name}}	Only the first name of the affiliate contact
{{affiliate.last_name}}	Only the last name of the affiliate contact
{{affiliate.email}}	The email address of the affiliate contact
{{affiliate.campaign_name}}	The name of the affiliate campaign that the contact was added to
{{affiliate.commission}}	The commission amount or percentage of the affiliate campaign that the contact was added to
{{affiliate.link}}	The affiliates unique link for the specific affiliate campaign
{{affiliate.location_name}}	The name of your account this contact is referring people to
{{affiliate.client_portal_url}}	The link to your accounts client portal for affiliates to manage their information, view commissions, and more

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ORDER FIELDS

Custom Field	Populates
{{order.source}}	Where the order was submitted within the system
{{order.payment_gateway}}	The backend provider used to process the order payment
{{order.created_on}}	The date the order was submitted
{{order.customer.first_name}}	Only the first name of the contact that submitted the order
{{order.customer.last_name}}	Only the last name of the contact that submitted the order
{{order.customer.name}}	Full name of the contact that submitted the order
{{order.customer.email}}	Email address of the contact that submitted the order
{{order.customer.phone}}	Phone number of the contact that submitted the order
{{order.customer.full_address}}	Entire physical address of the contact that submitted the order
{{order.customer.city}}	City of the contact that submitted the order
{{order.customer.state}}	State of the contact that submitted the order
{{order.customer.postal_code}}	Zip/Postal code of the contact that submitted the order
{{order.customer.country}}	Country of the contact that submitted the order
{{order.currency_code}}	Three–letter alphabetic codes that represent the various currencies (USD)
{{order.currency_symbol}}	The type of currency symbol ($)
{{order.total_cart_price}}	The cumulative cost of all items in shopping cart
{{order.has_discount}}	Did this order use a discount of any kind?
{{order.total_discount}}	The total amount discounted on the order
{{order.discount_code}}	The discount code used on the order
{{order.total_price}}	The cumulative cost of the whole order

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INVOICE FIELDS

Custom Field	Populates
{{invoice.company.name}}	Name of the company issuing the invoice
{{invoice.company.phone}}	Phone number of the company issuing the invoice
{{invoice.company.address}}	Physical address of the company issuing the invoice
{{invoice.company.city}}	City of the company issuing the invoice
{{invoice.company.state}}	State of the company issuing the invoice
{{invoice.company.country}}	Country of the company issuing the invoice
{{invoice.company.website}}	Website link of the company issuing the invoice
{{invoice.company.logo}}	Logo image URL of the company issuing the invoice
{{invoice.customer.name}}	Full name of the contact being invoiced
{{invoice.customer.first_name}}	Only the first name of the contact being invoiced
{{invoice.customer.last_name}}	Only the last name of the contact being invoiced
{{invoice.customer.phone}}	Phone number of the contact being invoiced
{{invoice.customer.email}}	Email Address of the contact being invoiced
{{invoice.customer.company}}	Company name of the contact being invoiced
{{invoice.customer.address}}	Full physical address of the contact being invoiced
{{invoice.customer.city}}	City of the contact being invoiced
{{invoice.customer.state}}	State of the contact being invoiced
{{invoice.customer.postal_code}}	Zip/Postal coded of the contact being invoiced
{{invoice.sender.name}}	Name of the user issuing the invoice
{{invoice.customer.email}}	Email address of the user issuing the invoice

INVOICE FIELDS

Custom Field	Populates
{{invoice.name}}	The name of the invoice issued
{{invoice.number}}	The ID number of the invoice issued
{{invoice.issue_date}}	The date the invoice was sent to the contact
{{invoice.due_date}}	The date the invoice needs to be paid by
{{invoice.sub_total}}	The cost of the invoice prior to discounts or taxes
{{invoice.currency_code}}	Three–letter alphabetic codes that represent the various currencies (USD)
{{invoice.discount_amount}}	The total amount discounted on the invoice
{{invoice.tax_amount}}	The total cost of taxes added to the invoice
{{invoice.total_amount}}	The entire cost of the invoice
{{invoice.title}}	The title of the invoice issued
{{invoice.url}}	The link to pay the issued invoice
{{invoice.card.brand}}	The company of the credit card the contact used to pay
{{invoice.card.last4}}	The last 4 digits of the credit card the contact used to pay

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PROPOSAL FIELDS

Custom Field	Populates
{{document.name}}	The name of the proposal issued to the contact
{{document.url}}	The link to view the proposal issued to the contact
{{document.type}}	The type of proposal issued to the contact
{{document.totalAmount}}	The total cost of the proposed estimate
{{document.currencyCode}}	Three-letter alphabetic codes that represent the various currencies (USD)
{{document.currencySymbol}}	The type of currency symbol ($)

13

RECEIPT FIELDS

Custom Field	Populates
{{receipt.company.name}}	The name of the company issuing the receipt
{{receipt.company.phone}}	The phone number of the company issuing the receipt
{{receipt.company.address}}	The full physical address of the company issuing the receipt
{{receipt.company.city}}	Only the city of the company issuing the receipt
{{receipt.company.state}}	Only the state of the company issuing the receipt
{{receipt.company.country}}	Only the country of the company issuing the receipt
{{receipt.company.website}}	The website link of the company issuing the receipt
{{receipt.company.logo}}	The logo image URL of the company issuing the receipt
{{receipt.customer.name}}	The full name of the contact receiving the receipt
{{receipt.customer.first_name}}	Only the first name of the contact receiving the receipt
{{receipt.customer.last_name}}	Only the last name of the contact receiving the receipt
{{receipt.customer.phone}}	Phone number of the contact receiving the receipt
{{receipt.customer.email}}	Email address of the contact receiving the receipt
{{receipt.customer.company}}	The company name of the contact receiving the receipt
{{receipt.customer.address}}	The full physical address of the contact receiving the receipt
{{receipt.customer.city}}	Only the city of the contact receiving the receipt
{{receipt.customer.state}}	Only the state of the contact receiving the receipt
{{receipt.customer.postal_code}}	Only the zip/postal code of the contact receiving the receipt
{{receipt.number}}	The ID number of the receipt being issued

RECEIPT FIELDS

Custom Field	Populates
{{receipt.date_paid}}	The date the contact purchased whatever issued the receipt
{{receipt.currency_symbol}}	The type of currency symbol ($)
{{receipt.currency_code}}	Three-letter alphabetic codes that represent the various currencies (USD)
{{receipt.sub_total}}	The cost of the purchase prior to discounts or taxes
{{receipt.discount_amount}}	The total amount discounted on the purchase
{{receipt.tax_amount}}	The total cost of taxes added to the purchase
{{receipt.total_amount}}	The entire cost of the purchase
{{receipt.title}}	The title of the receipt issued
{{receipt.url}}	The link to view the purchase receipt

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!

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