

Custom Fields

What are Fields and Custom Fields?

There are two types of user-definable fields available in ContactEase: Fields and Custom Fields. The primary difference between the two is that Custom Fields are indexed and can be used in sorting displays and output reports.

In both instances, however, Fields and Custom Fields are fully searchable and used as criteria in queries.

Fields – an unlimited number of fields can be added for records. They appear on the Fields tab of each record and can also optionally appear on the Record tab.



Custom Fields – 12 fields appear on the Custom tab. These fields are indexed and can be used to sequence reports. Four of the fields are text-only and should be used for entering text data. Eight of the fields are numeric-only fields and should be used to store dates and numbers (E.g. Social Security numbers, Claim numbers, Tax ID numbers, Birth dates, Start dates, etc.). The numeric fields all have a “#” sign as part of their default name (E.g. Custom #1).



Custom Fields

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Unlike Fields, which are unlimited in number; Custom Fields are resident in the system and limited to a total of 12. Four are text-only, and 8 are numeric-only.

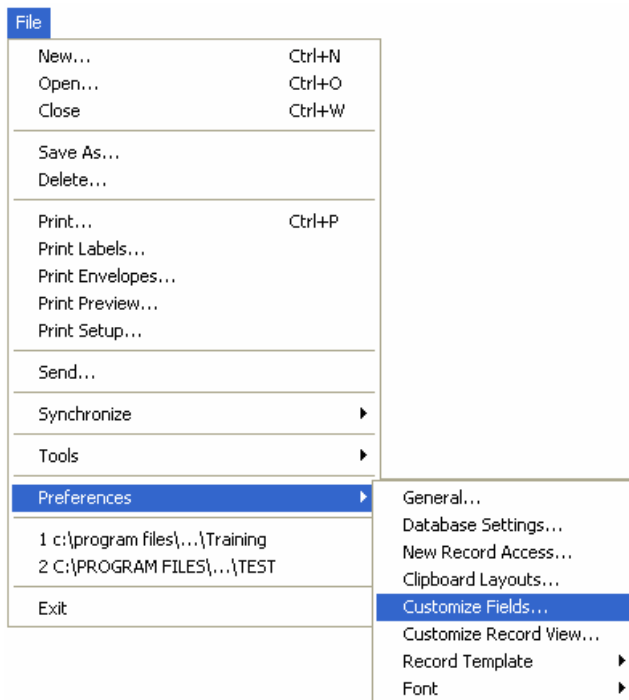
Custom1 – Custom4 – are default titles of the four alphanumeric Custom Fields. These titles can be changed by the user and can have a pre-defined choice list attached to them.

Custom #1 – Custom #8 – are default titles of the eight numeric Custom Fields. Similar to the text-only fields, these field titles can also be changed by the user. The included “#” in the default title, indicates this field is a numeric-only field which means that only numeric values can be assigned to this field.

If the field you wish to re-title will be used as a numeric field, be sure that you edit one of the fields containing a title using the “#”; these fields can then be formatted.

Changing the Title of Custom Fields

The pre-defined names of the Custom Fields can be modified to make them more easily identifiable.



To do so, use the **File** menu.

Select the **Preferences** option.

Next select **Customize Fields**.

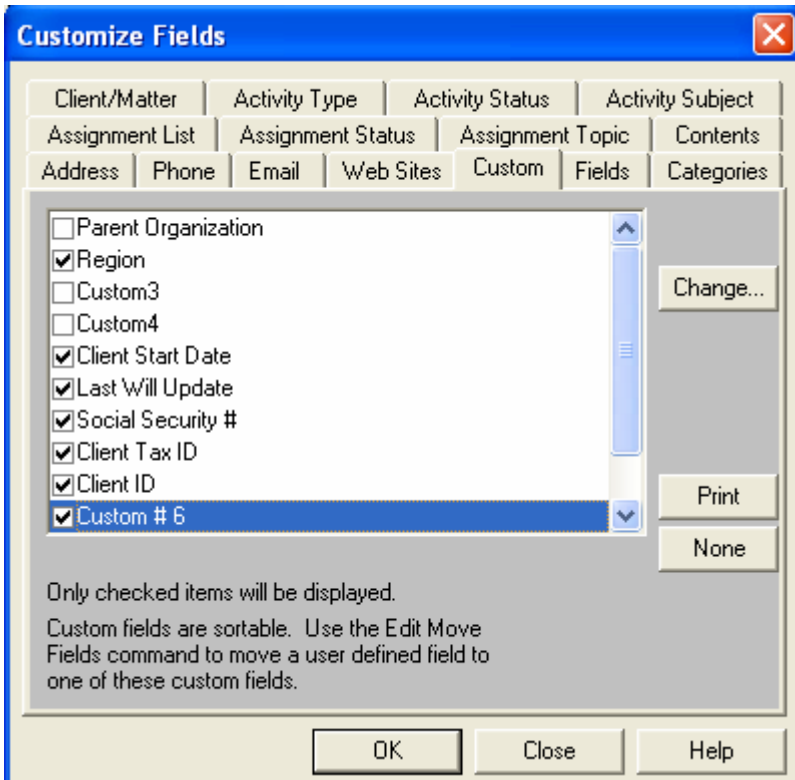
This will open up a Customize Fields window where you can add and edit a variety of fields in ContactEase.

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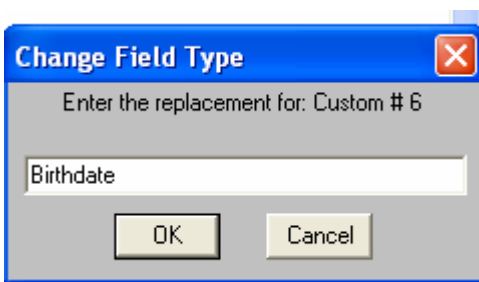
Click on the *Custom* tab to reveal the 12 Custom Fields.

The check box indicates this field is visible in the Custom tab for YOUR user ID. If you wish to hide a field from your view uncheck the box.

To change the title of a field, highlight the field and click the *Change* button. This will change the field name throughout the database.



Enter the name replacement and click the *OK* button.

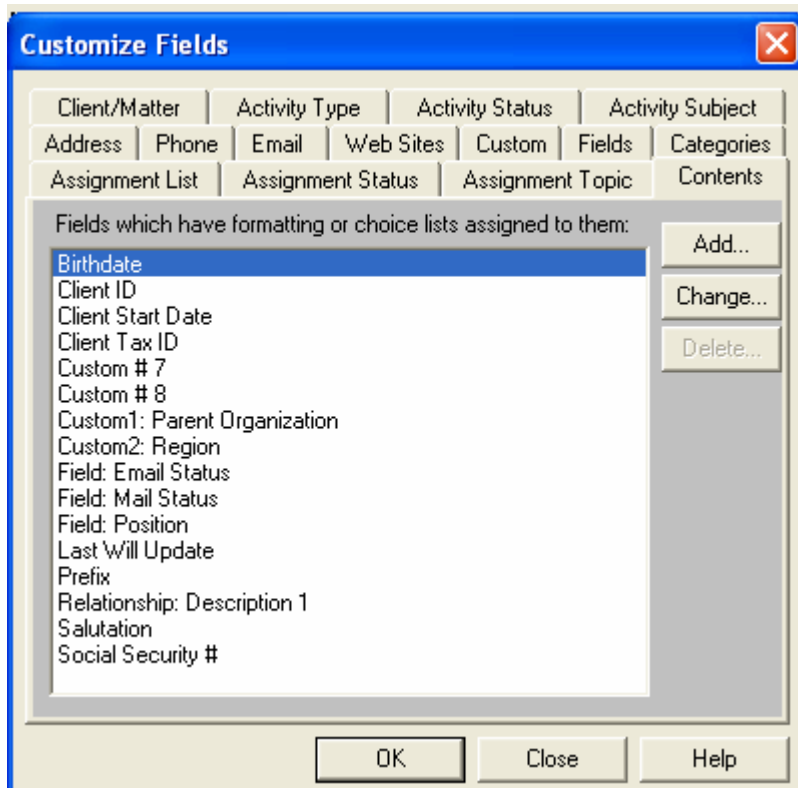


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Formatting Custom Numeric-Only Fields

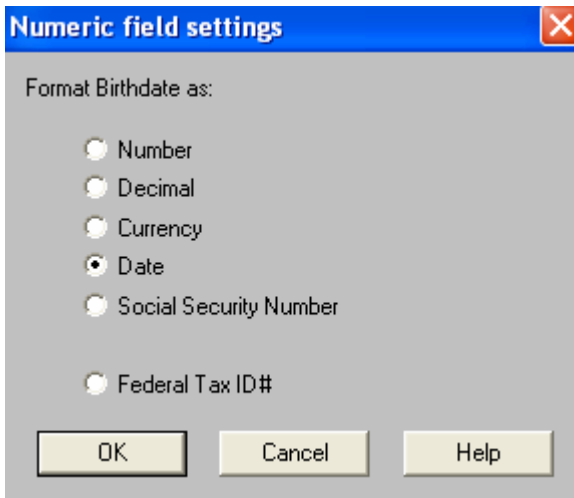
Numeric fields can have a variety of formats. If you leave a numeric field as is, it is limited to a numeric whole number. However, you may wish to create a “mask” for the number so it can be entered as a dollar amount, date, or even a Social Security number. Note: Creating a “mask” eliminates the need to enter dashes, dollar signs, etc).

Return to the Customize Fields window and select the *Contents* tab.



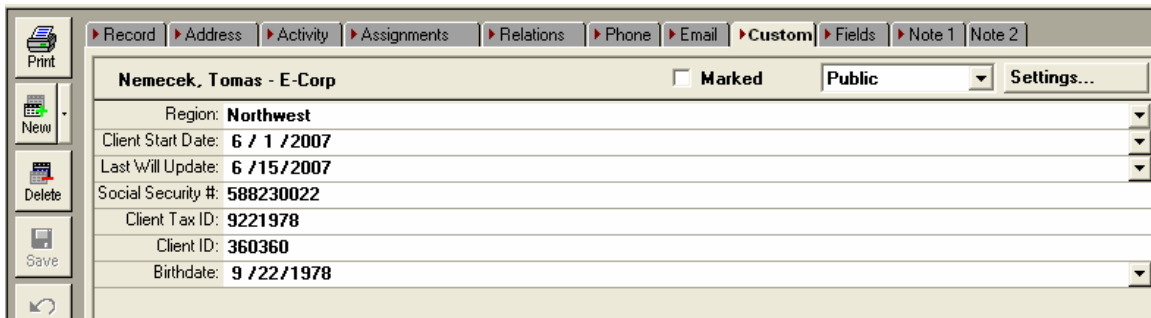
Highlight the field you wish to format and click the *Change* button. In our case we will change the format of the Birthdate field.

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Select the appropriate format and then click *OK*. (We will select “date”)

Then click *OK* to close out of the Customize Fields window.



You now have a re-titled Custom Field that is formatted. You now can enter information in that field for your contacts. Since our field is formatted to accept dates, we never have to enter the slashes; they are provided automatically.

END OF HINT!