Managing Custom Fields

Engagifii allows for custom fields to be added to your workspace's Relationship database. Check out below on how to manage those fields, add or remove them.

14 Steps [View most recent version]

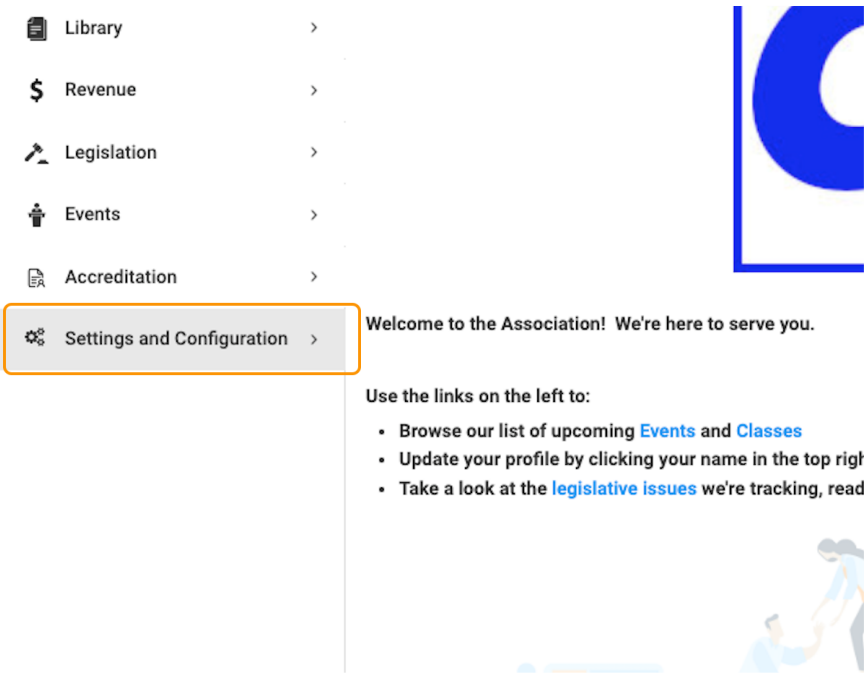
Created by	Creation Date	Last Updated
Engagifii Inc.	October 6, 2023	October 16, 2023

Head into your Engagifii Workspace

5 Steps

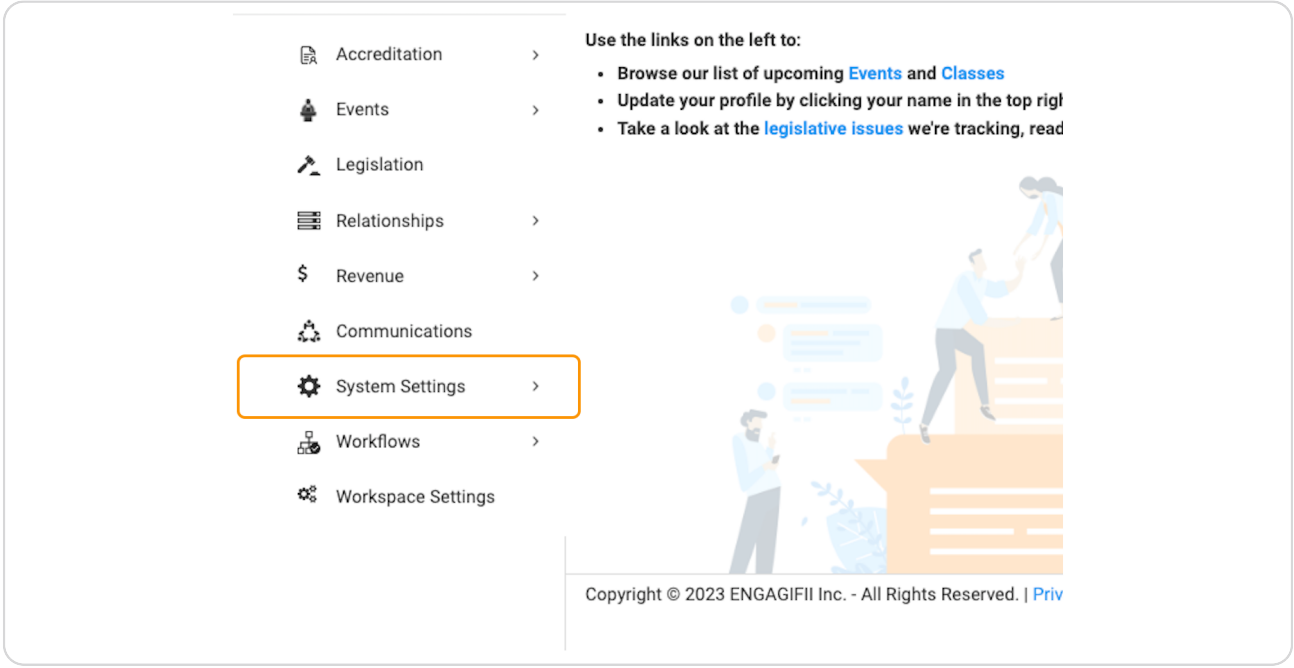
STEP 1

Click on Settings and Configuration



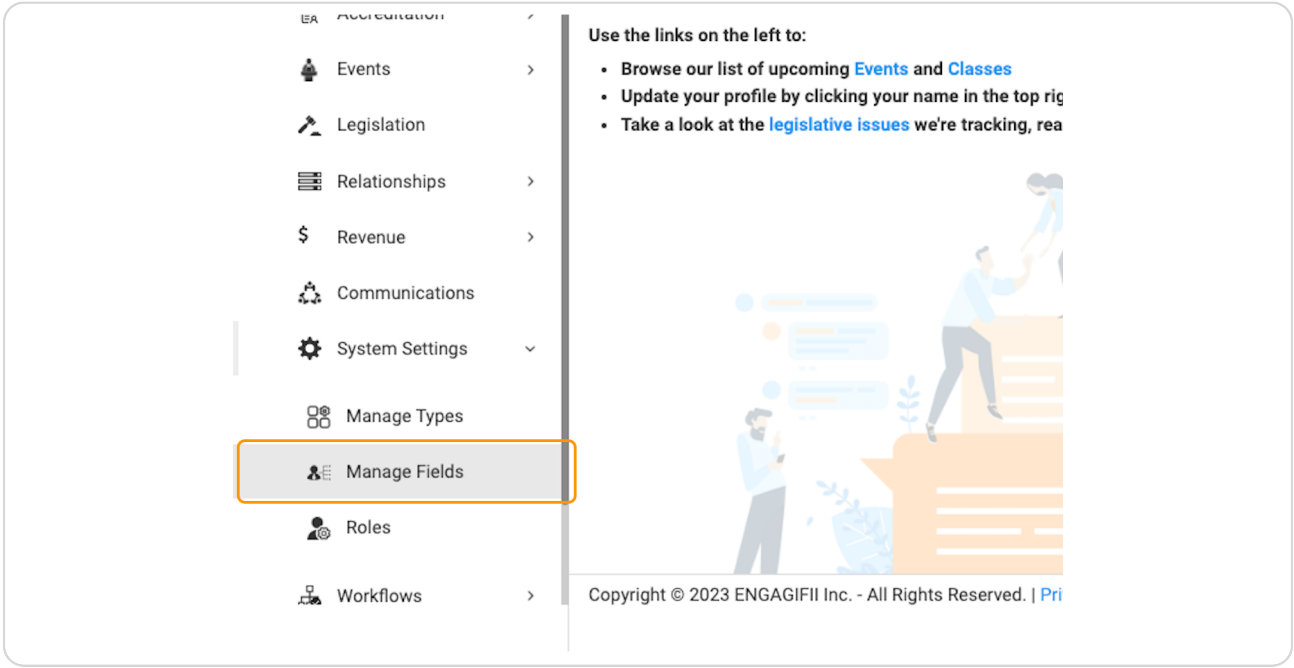
STEP 2

Click on System Settings



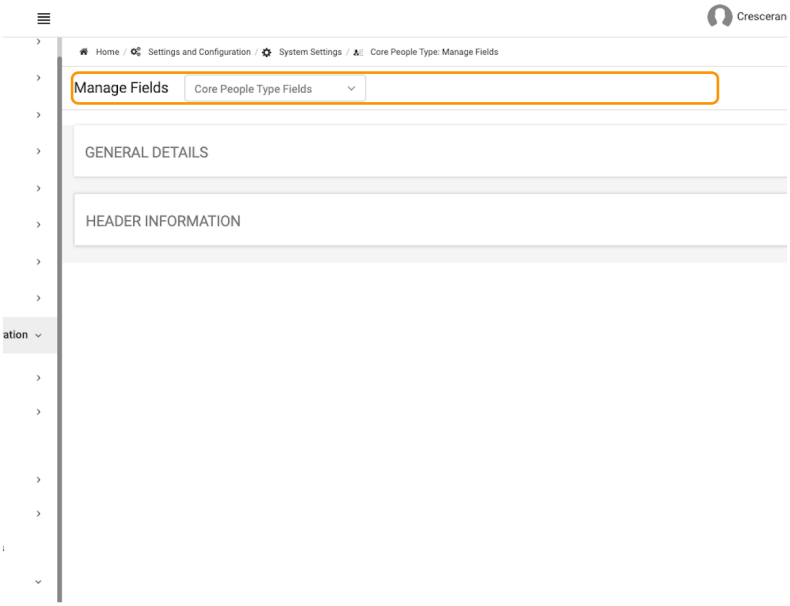
STEP 3

Click on Manage Fields



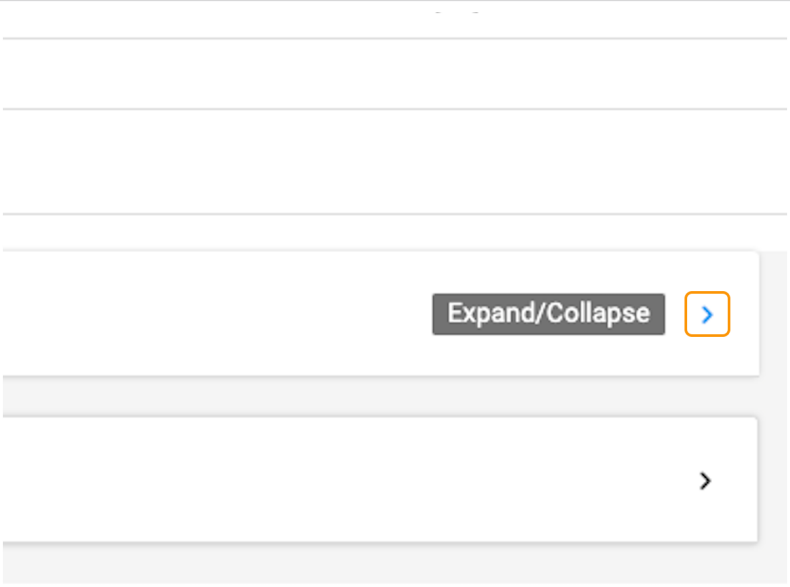
STEP 4

Take note of the Type of fields you'll be editing. In this tutorial, we'll be going over the People fields



STEP 5

Click on the arrow for the General Details row, this will expand the various fields within this section



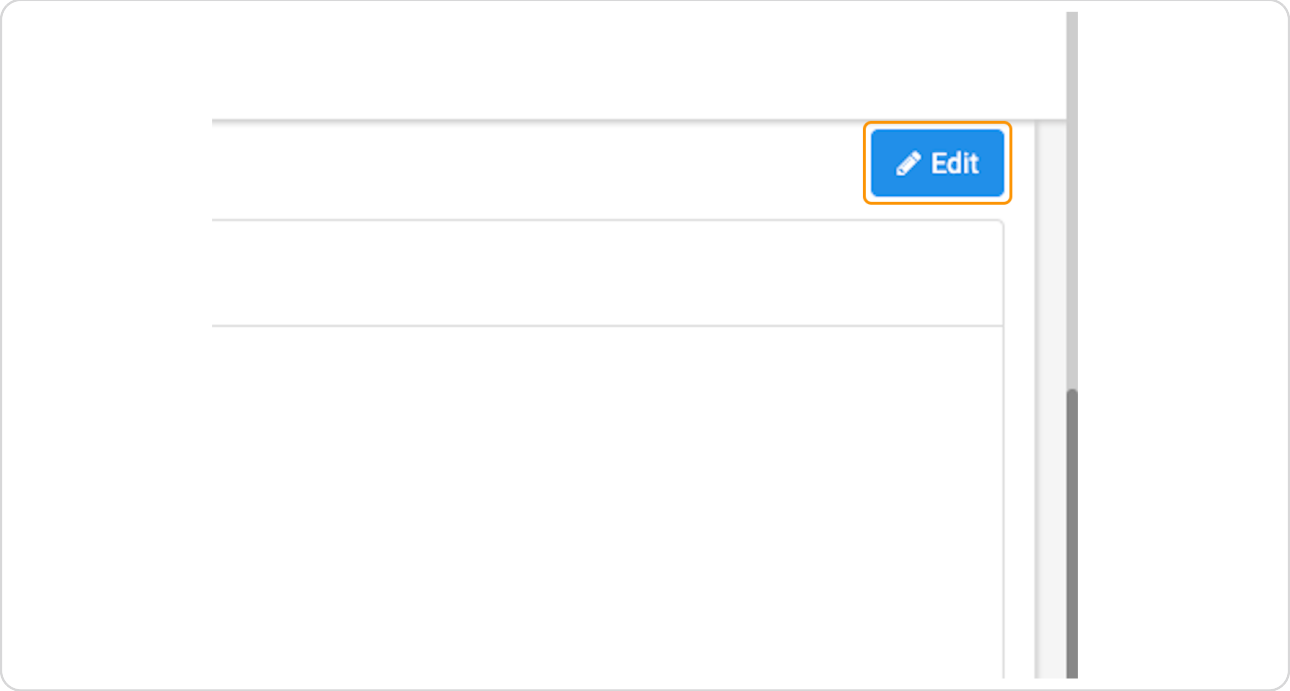
🖌️ Editing your current list of fields

3 Steps

This section will go over how to edit and manage already created fields within your workspace, changing how it works for the different of person types.

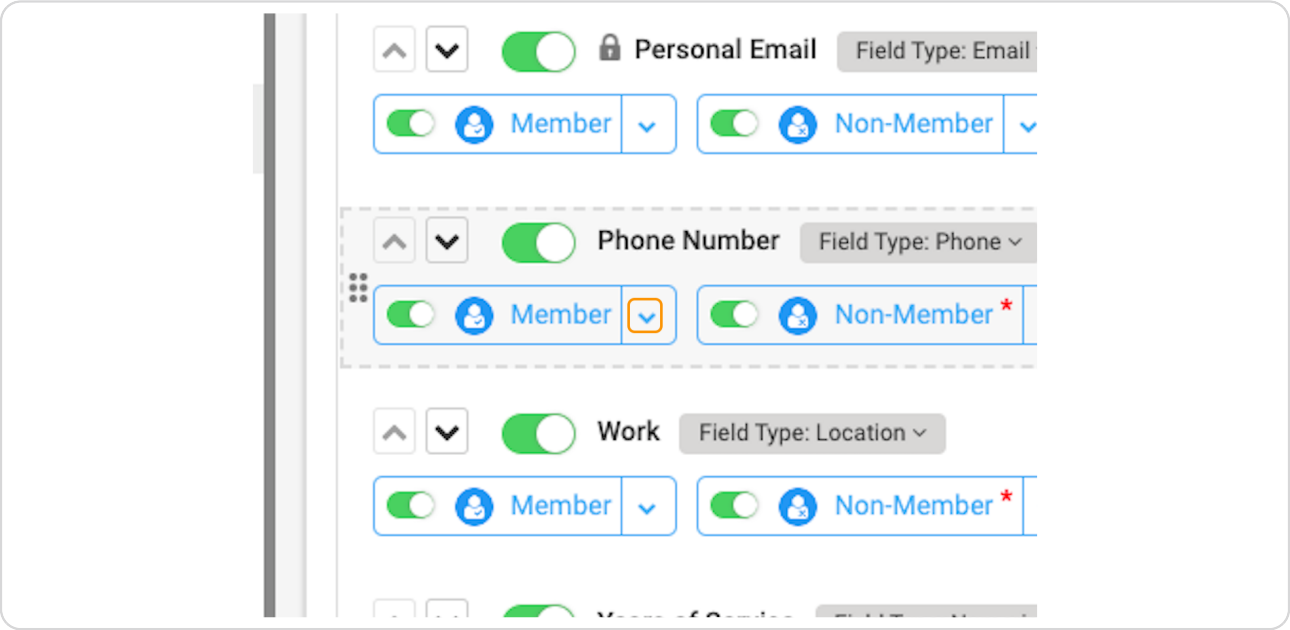
STEP 6

Click on Edit



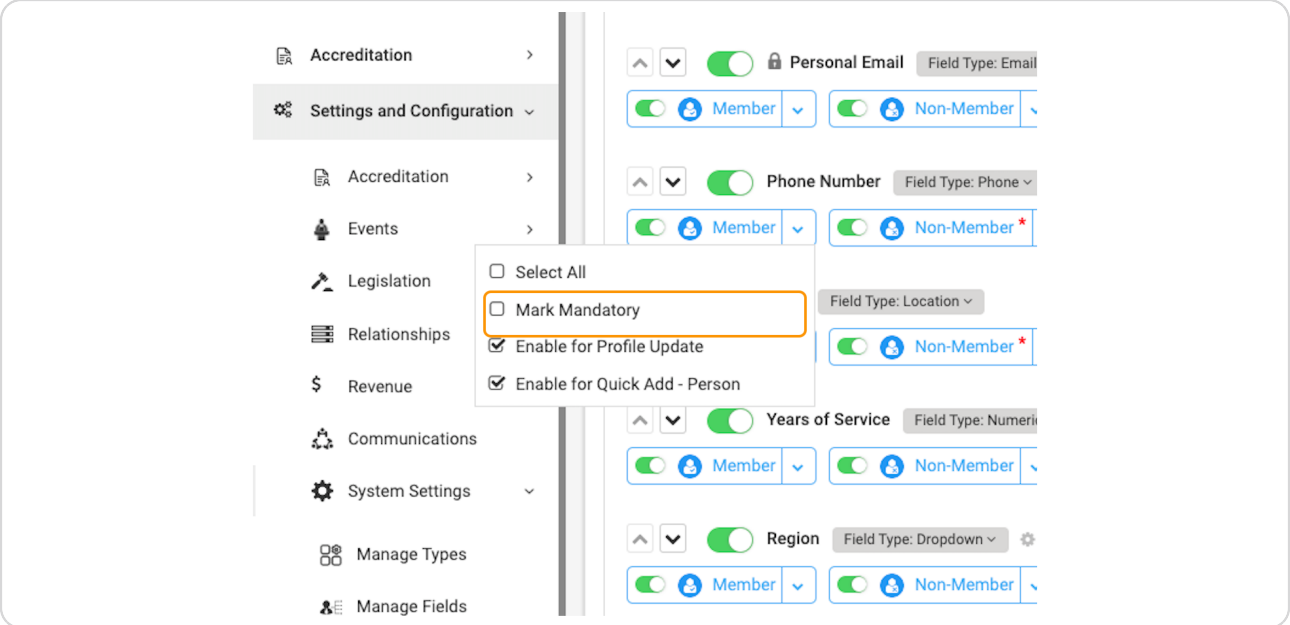
STEP 7

Find a field you would like to edit, and the person type you would like to edit it for and click the down arrow to the right



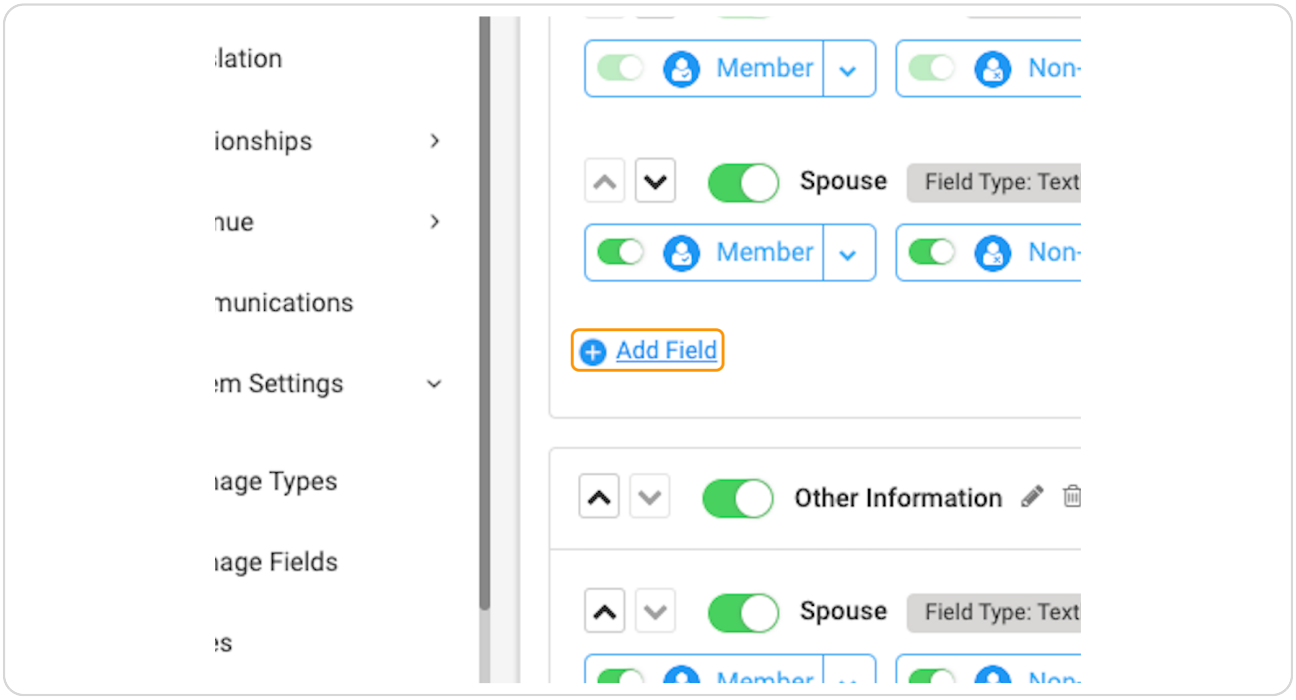
STEP 8

A drop down will pop out, giving you the various options you can choose from for that specific person type



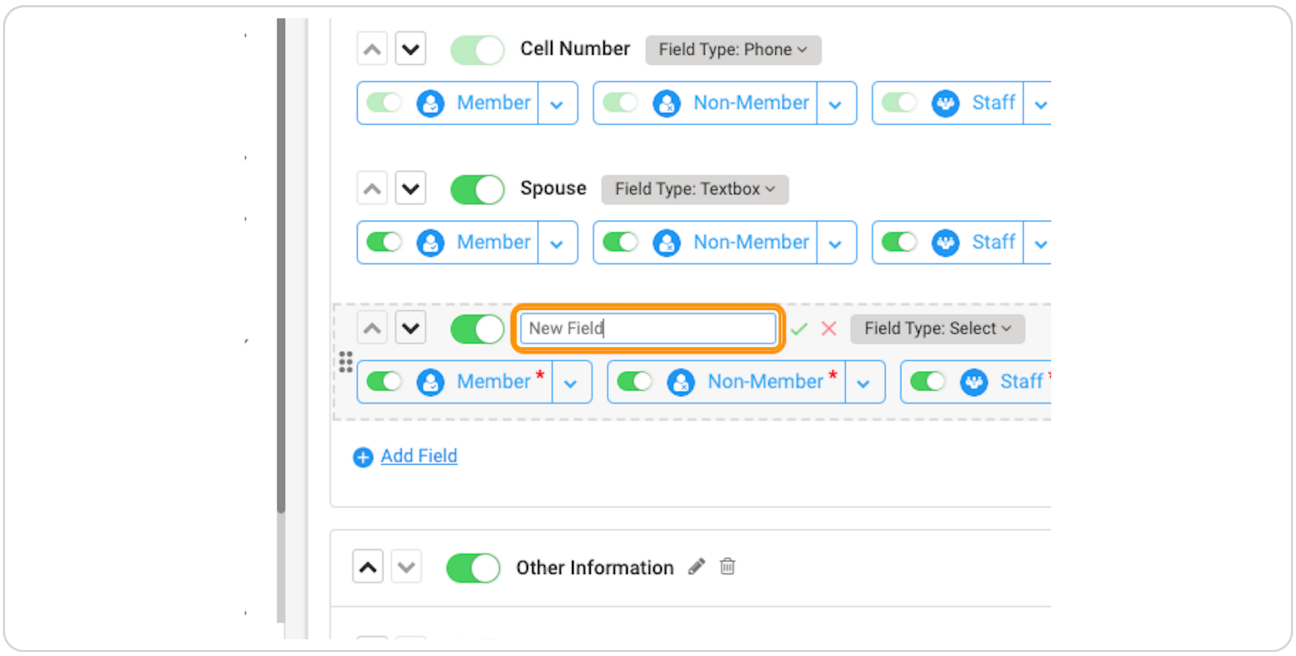
STEP 9

Click on Add Field at the bottom of the section you want your new field to show up in



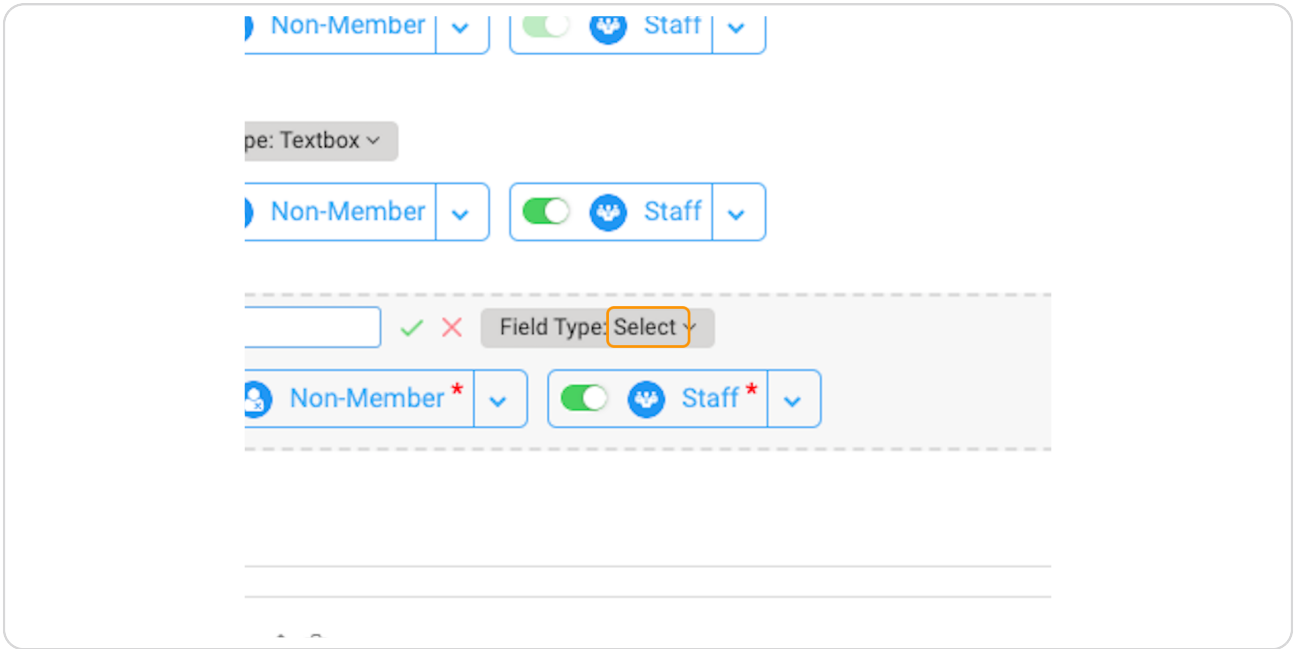
STEP 10

Type in your new Field Name



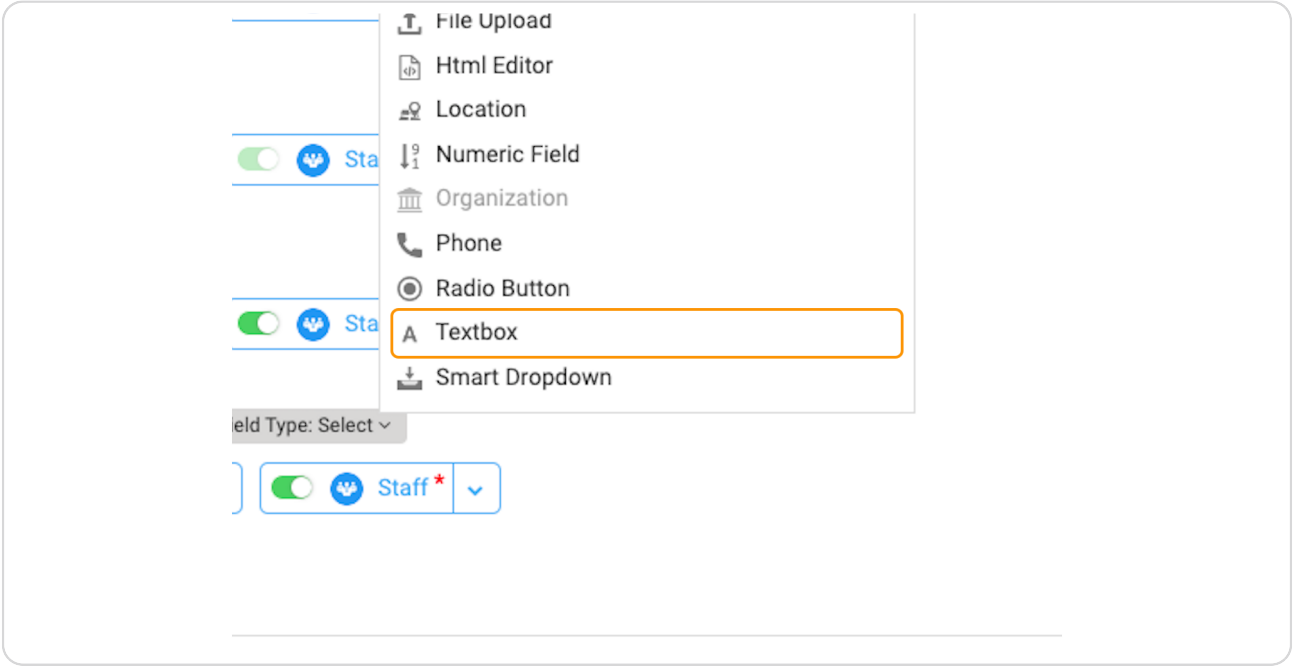
STEP 11

To choose what type of field, click on Select in the Field Type box to the right, and a drop down will pop up with the various options



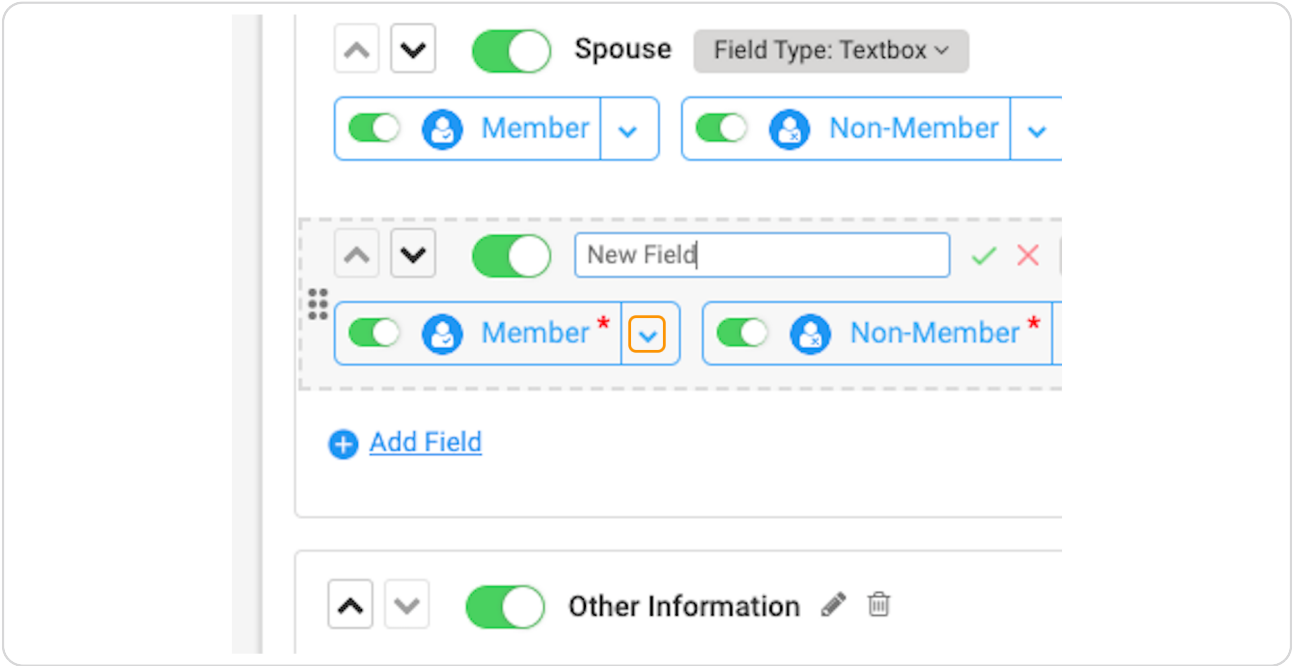
STEP 12

Click on the type you would like to use



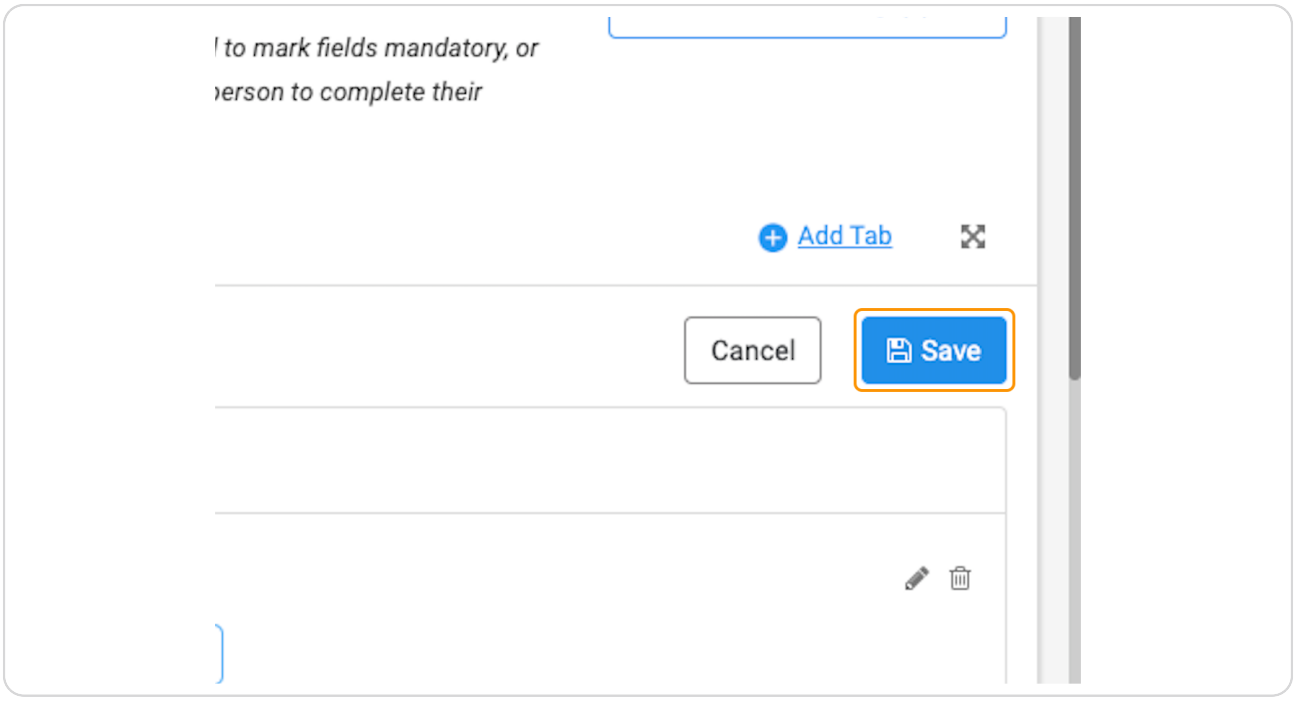
STEP 13

Make the adjustments to your Person Type settings below



STEP 14

Lastly, click on Save



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