

# 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](#) 

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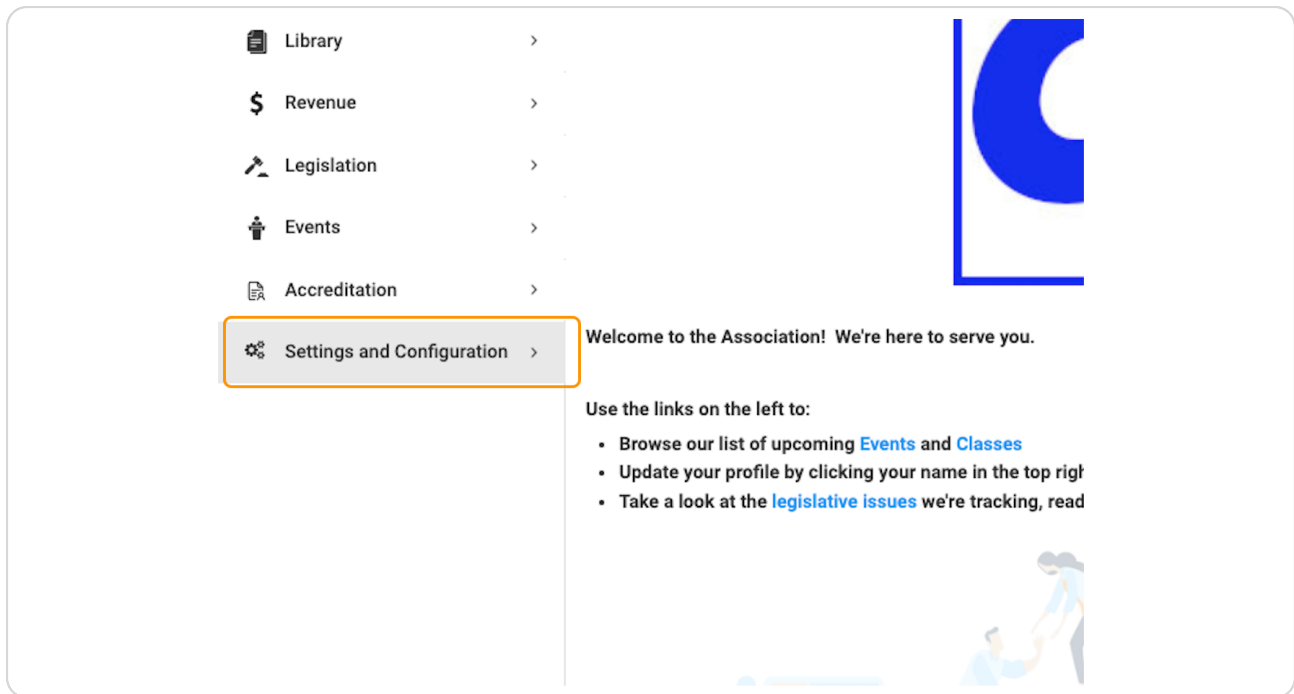
Created by  
Engagifii Inc.

Creation Date  
October 6, 2023

Last Updated  
October 16, 2023

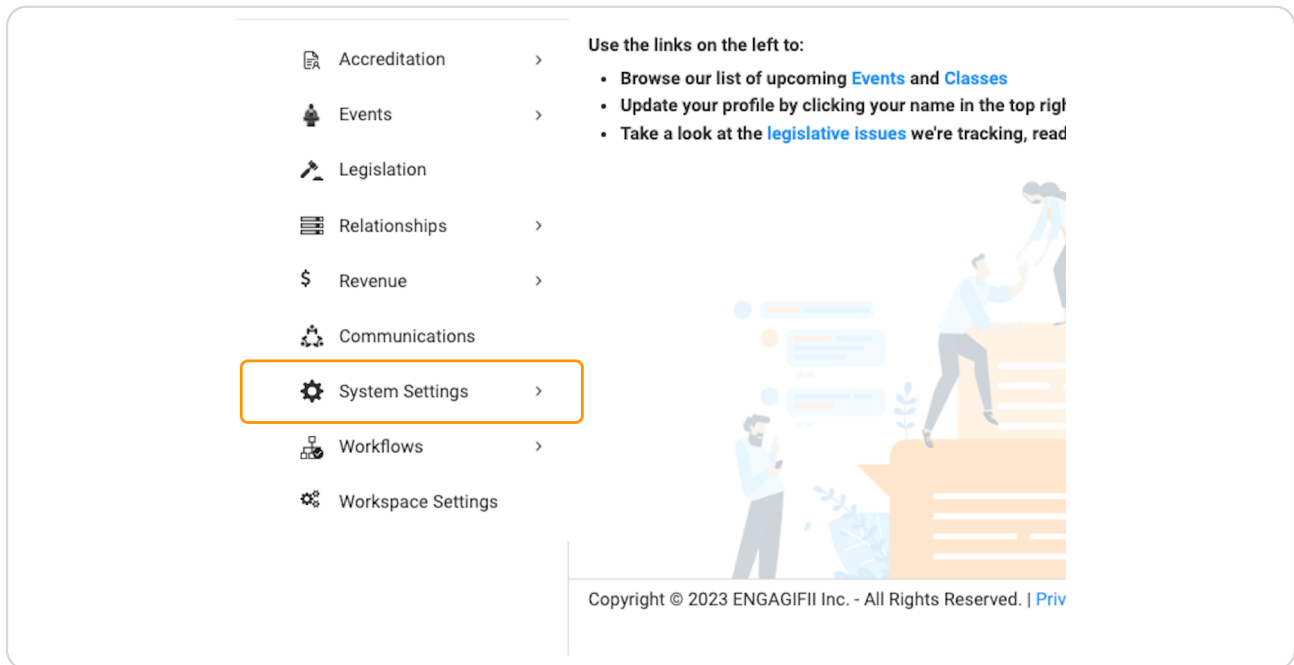
## STEP 1

### Click on Settings and Configuration



## STEP 2

### Click on System Settings



The screenshot shows a sidebar menu with the following items: Accreditation, Events, Legislation, Relationships, Revenue, Communications, System Settings (highlighted with an orange box), Workflows, and Workspace Settings. To the right of the menu, there is a list of instructions and a decorative illustration of people working together.

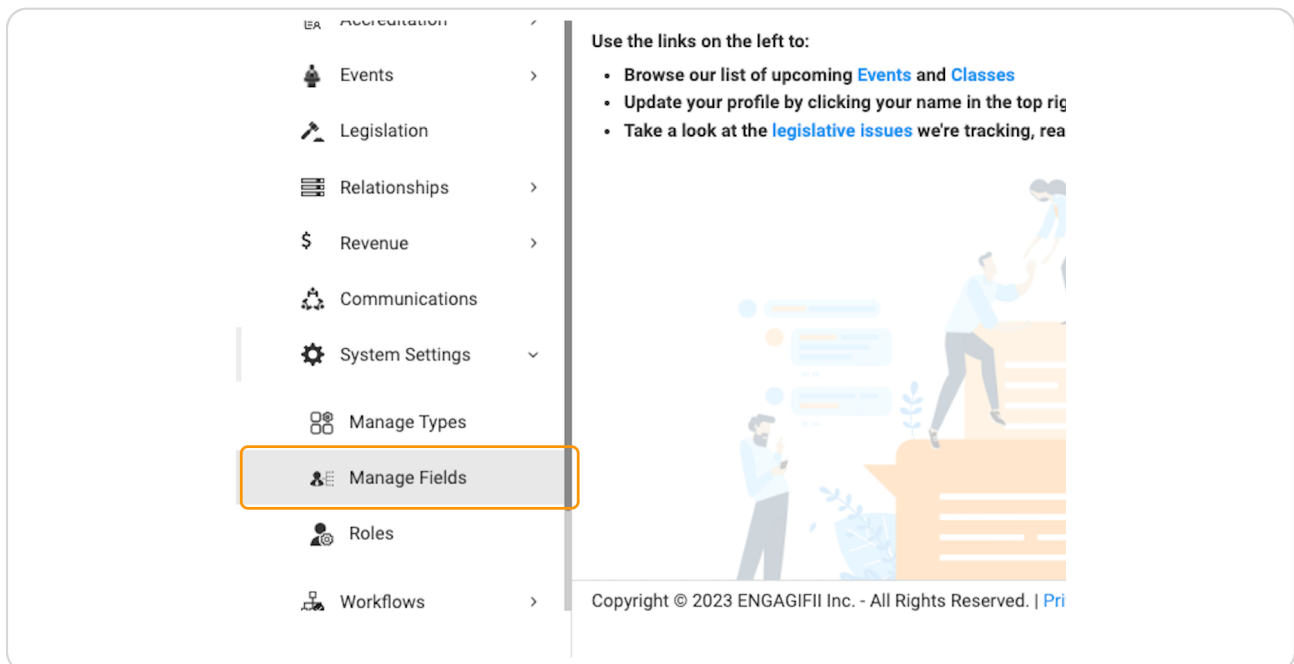
Use the links on the left to:

- Browse our list of upcoming [Events](#) and [Classes](#)
- Update your profile by clicking your name in the top right
- Take a look at the [legislative issues](#) we're tracking, read

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## STEP 3

### Click on Manage Fields



The screenshot shows the same sidebar menu as in Step 2, but with 'System Settings' expanded to show sub-items: Manage Types and Manage Fields (highlighted with an orange box). The rest of the menu and the right-side content remain the same.

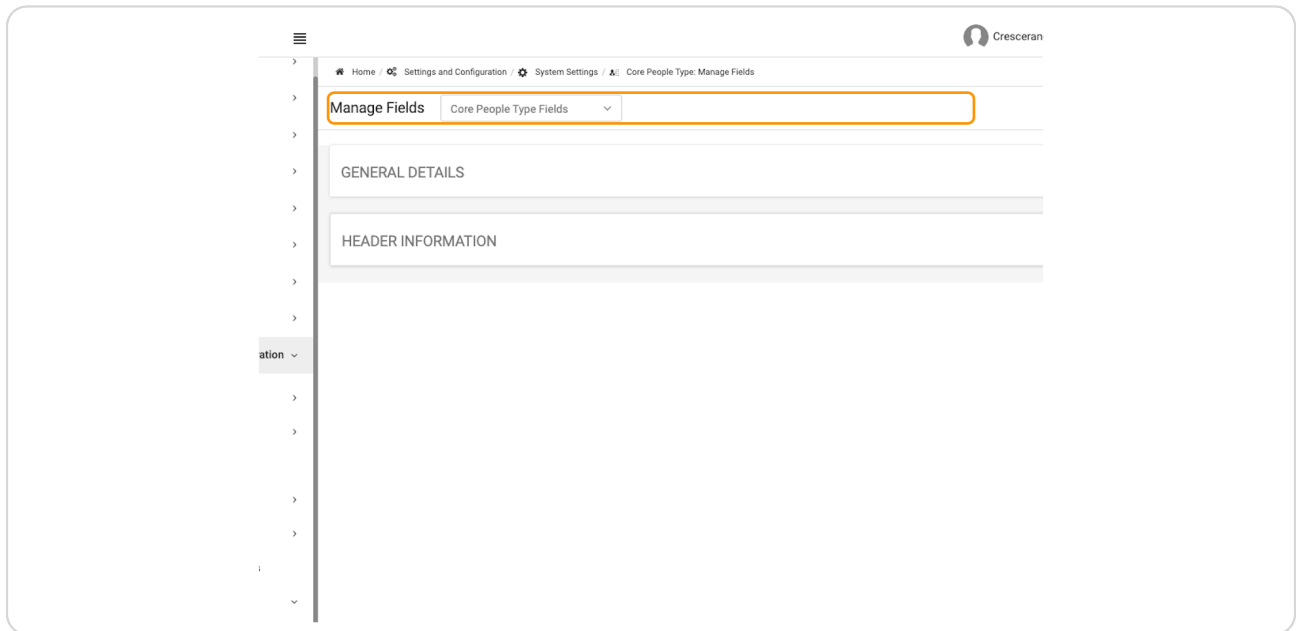
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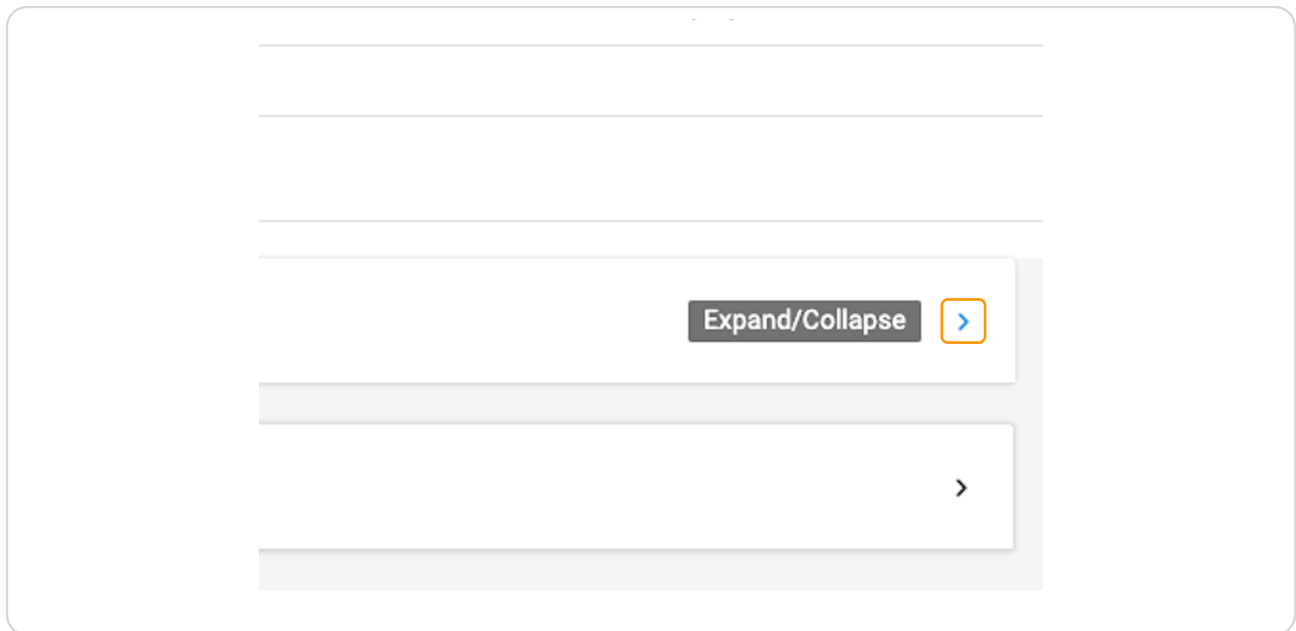
## STEP 4

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

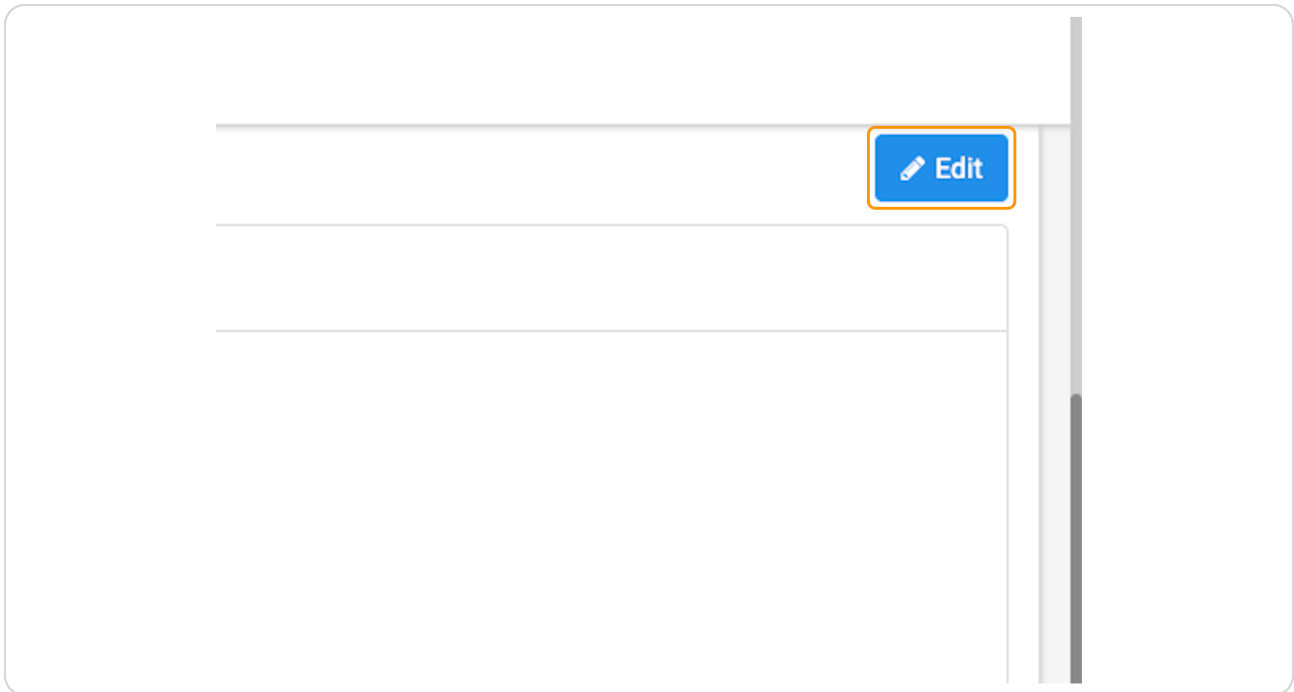
3 Steps

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.

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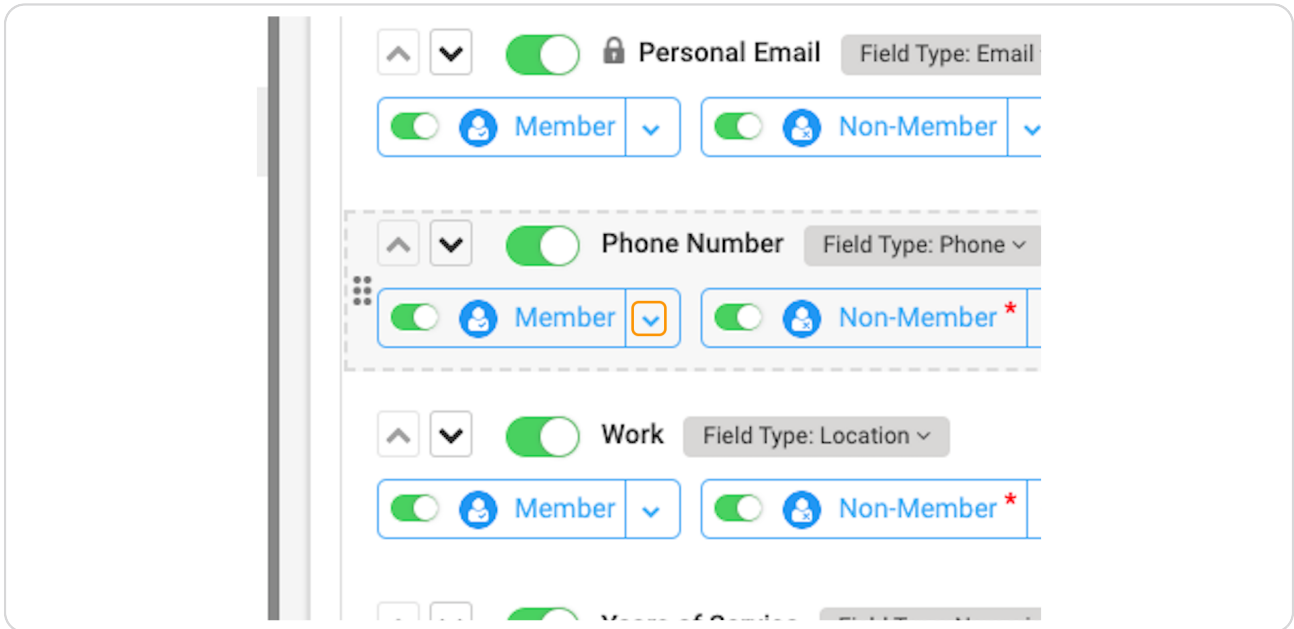
### STEP 6

#### Click on Edit



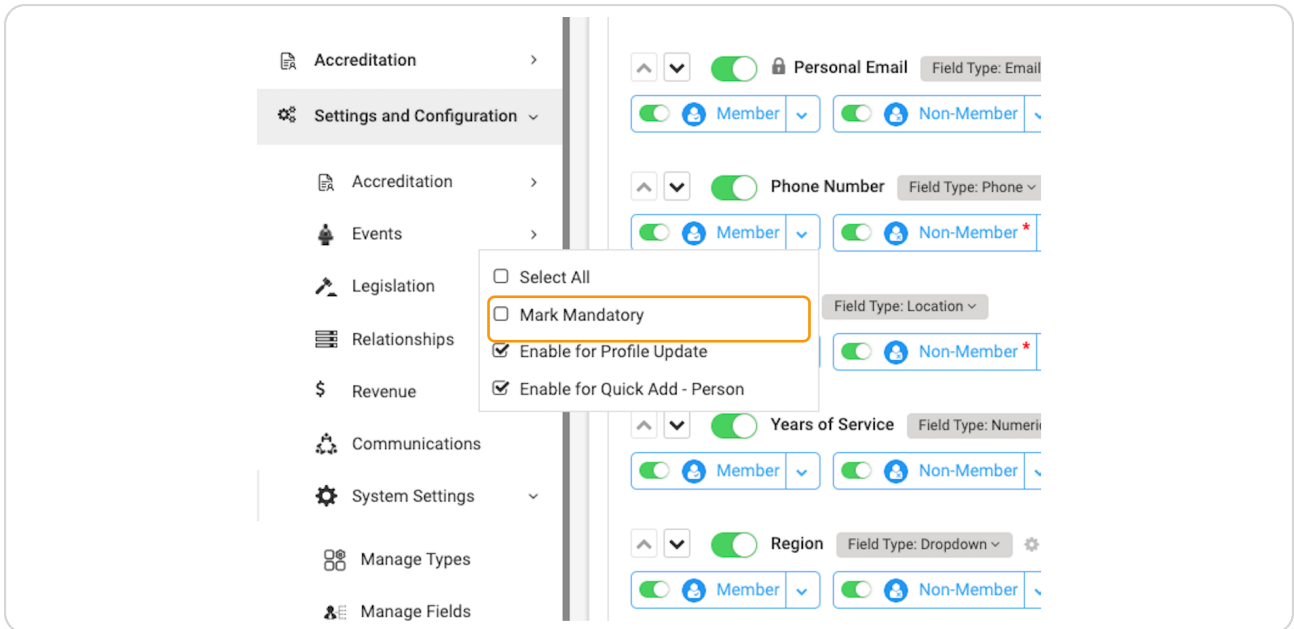
## STEP 7

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



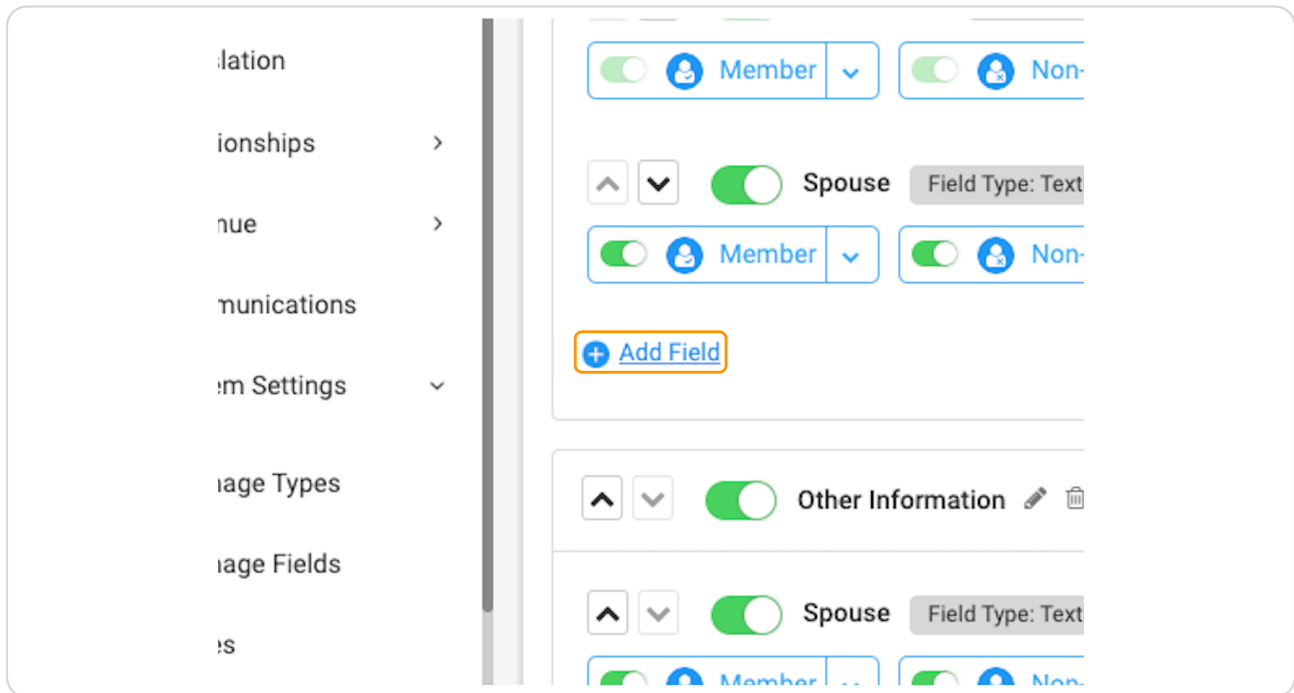
## STEP 8

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



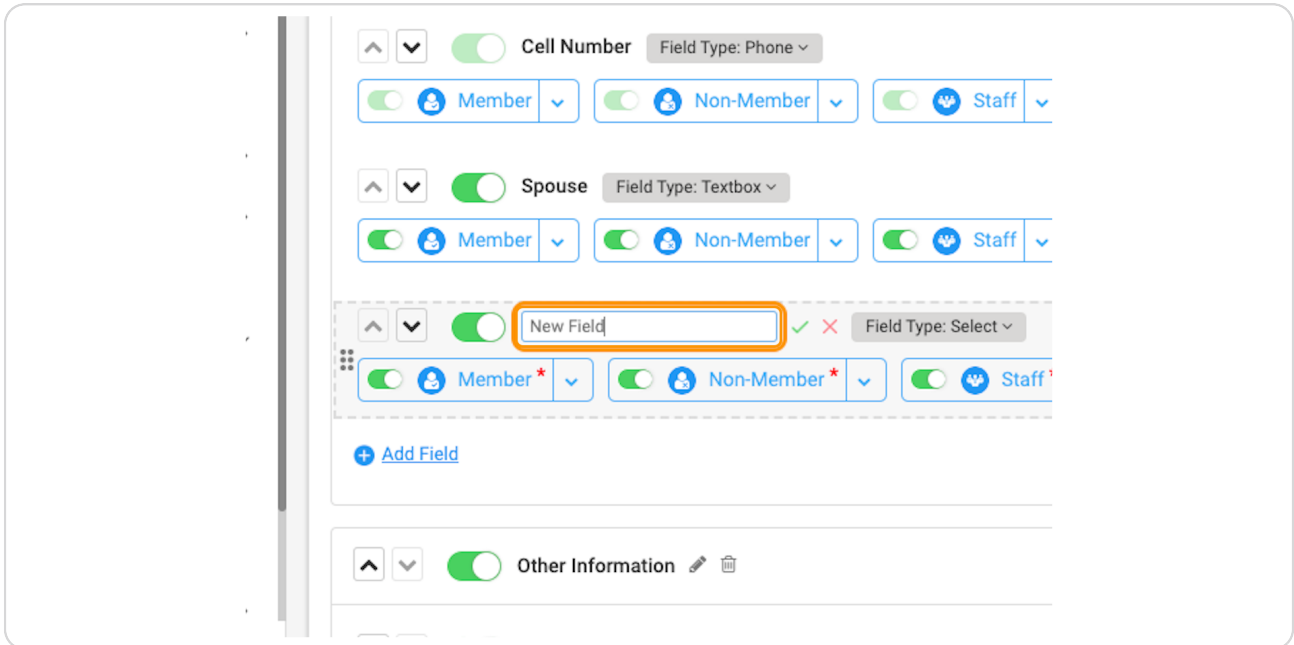
## STEP 9

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



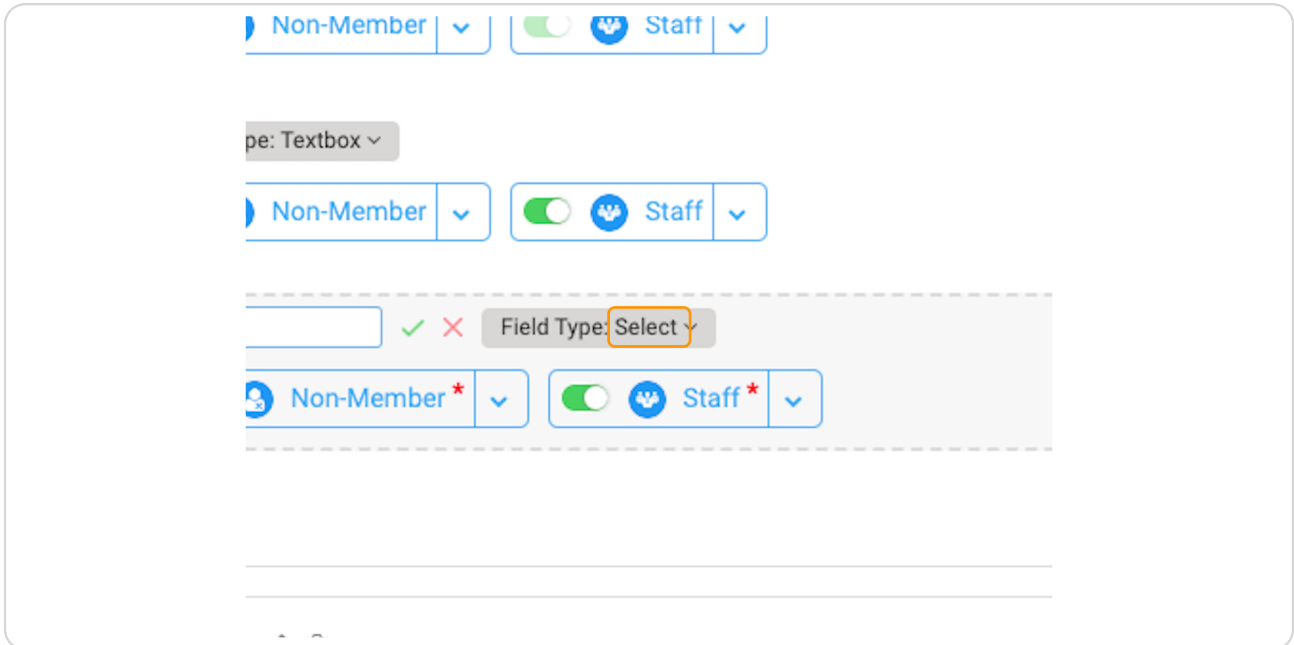
STEP 10

Type in your new Field Name



STEP 11

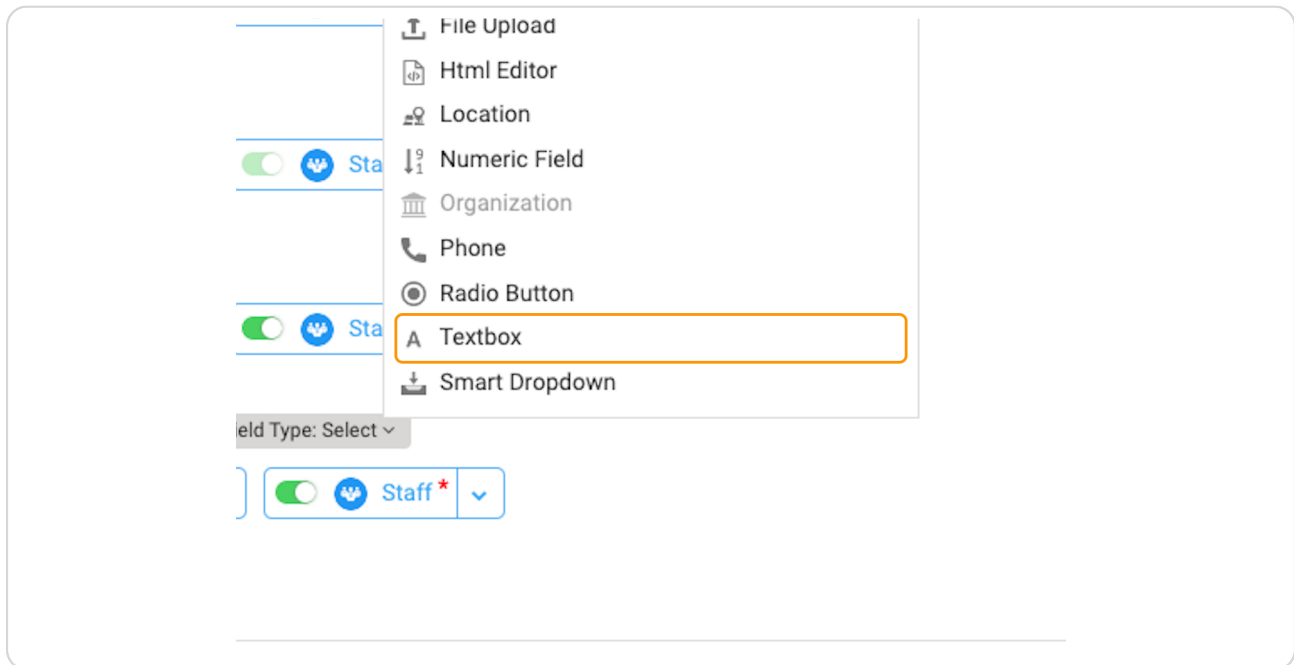
To choose what type of field, click on Select in the Field Type box to the right, and a drop down will pop up with the various options





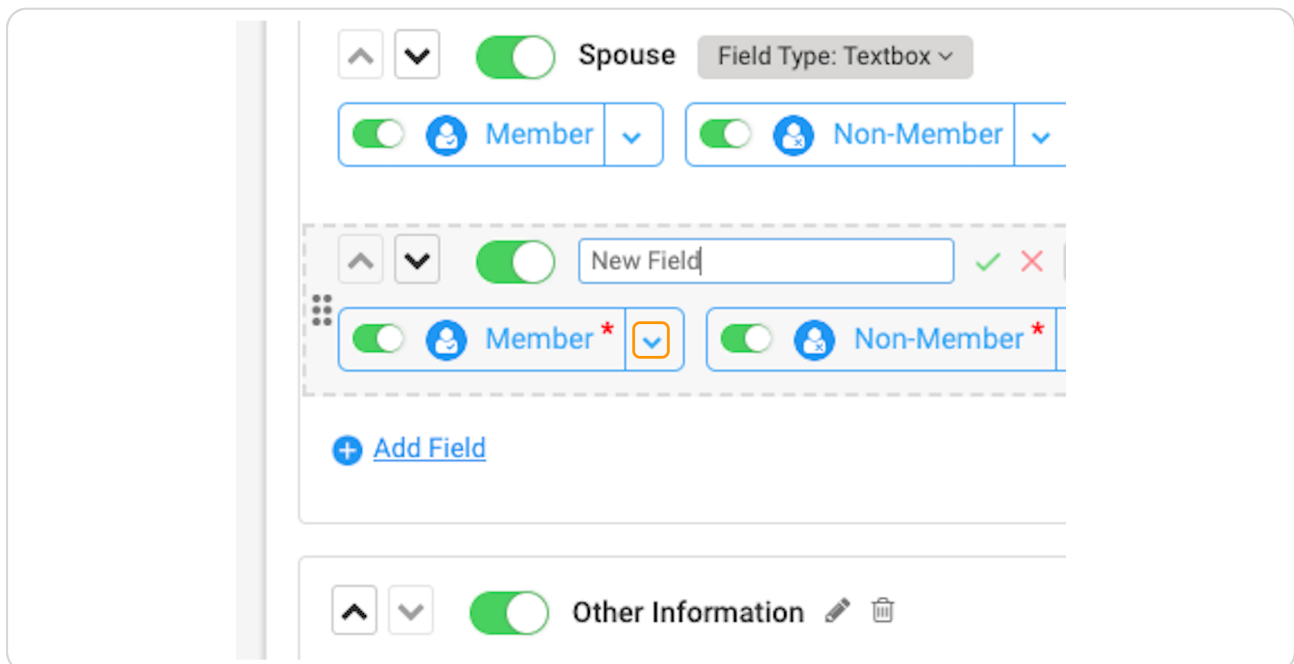
## STEP 12

Click on the type you would like to use



## STEP 13

Make the adjustments to your Person Type settings below



## STEP 14

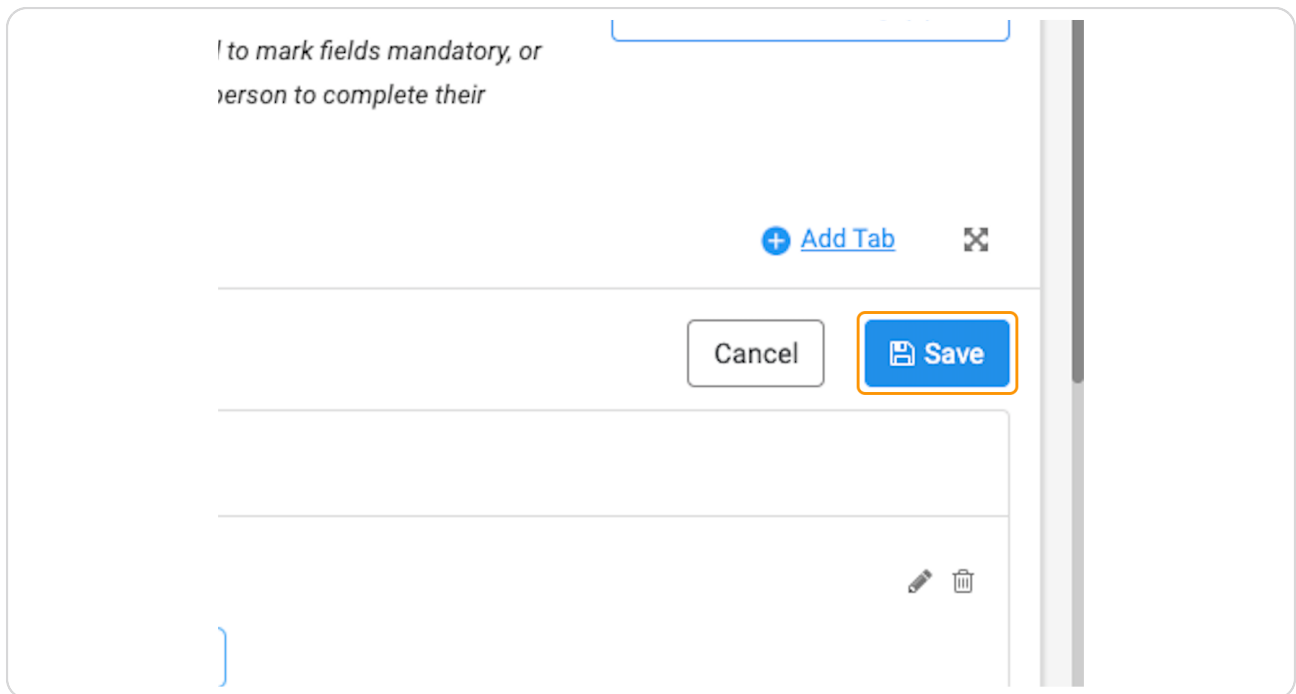
### Lastly, click on Save

! to mark fields mandatory, or  
erson to complete their

+ Add Tab ✕

Cancel Save

✎ 🗑

A screenshot of a form editor interface. At the top, there is a text label: "! to mark fields mandatory, or" followed by "erson to complete their" on the next line. Below this, there are two horizontal lines representing form fields. To the right of these fields, there is a blue button with a plus sign and the text "Add Tab", and a grey icon of a square with an 'X' inside. Below the fields, there are two more horizontal lines. At the bottom right of this section, there are two icons: a pencil and a trash can. In the center-right area, there are two buttons: a white "Cancel" button and a blue "Save" button with a white floppy disk icon. The "Save" button is highlighted with a thick orange border. On the far right, there is a vertical grey bar representing a scrollbar. At the bottom left, there is a blue closing bracket symbol " ]".

