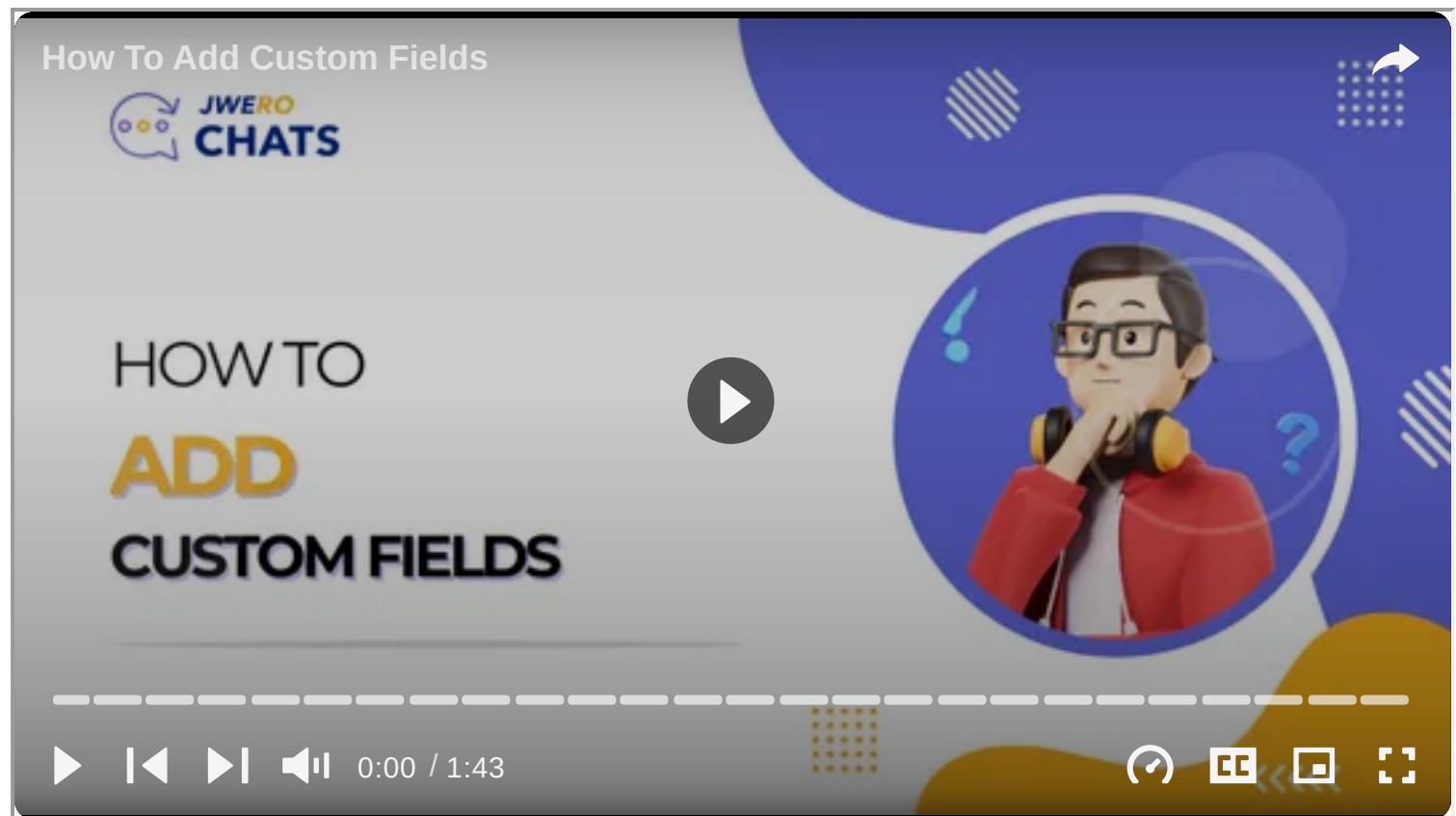


# How To Add Custom Fields



## 1. Custom fields



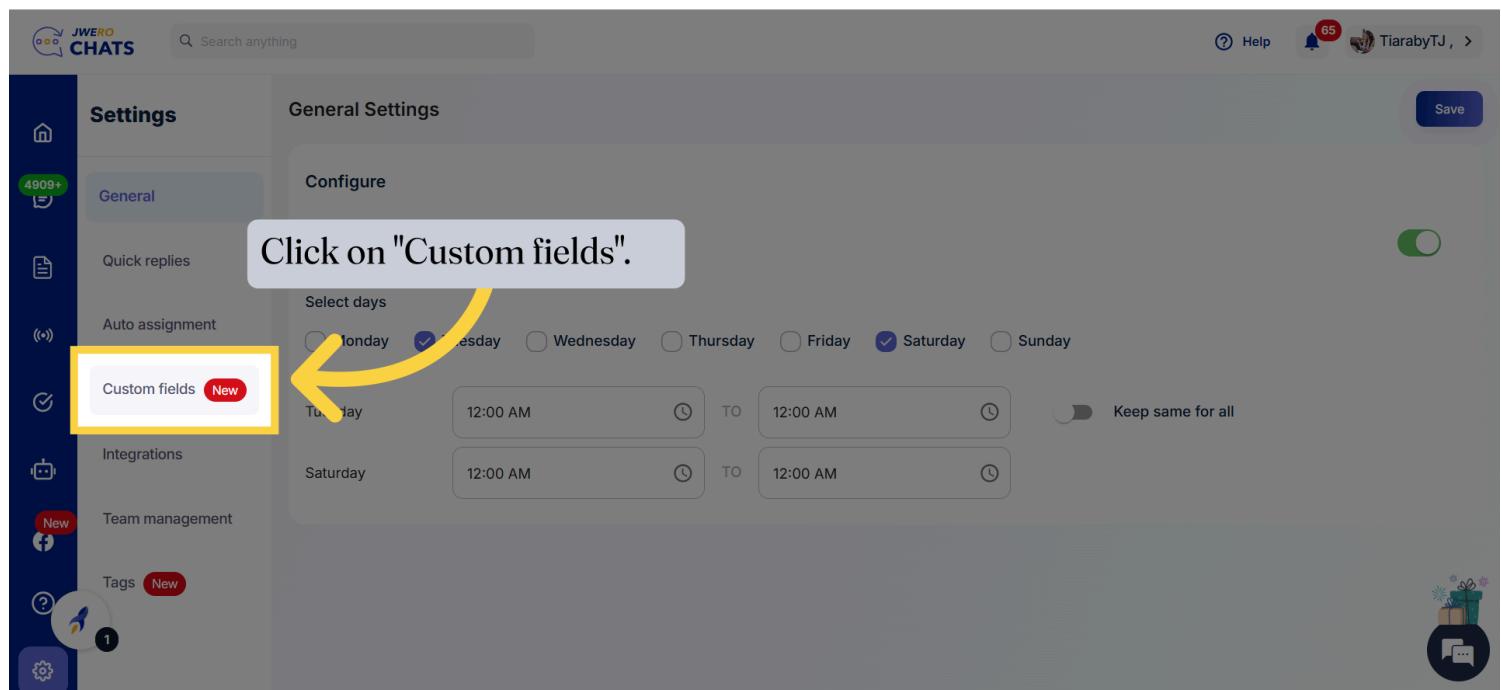
Custom fields allows you to store additional, tailored information about contacts, enabling better organization, personalized communication, targeted campaigns, and enhanced reporting.



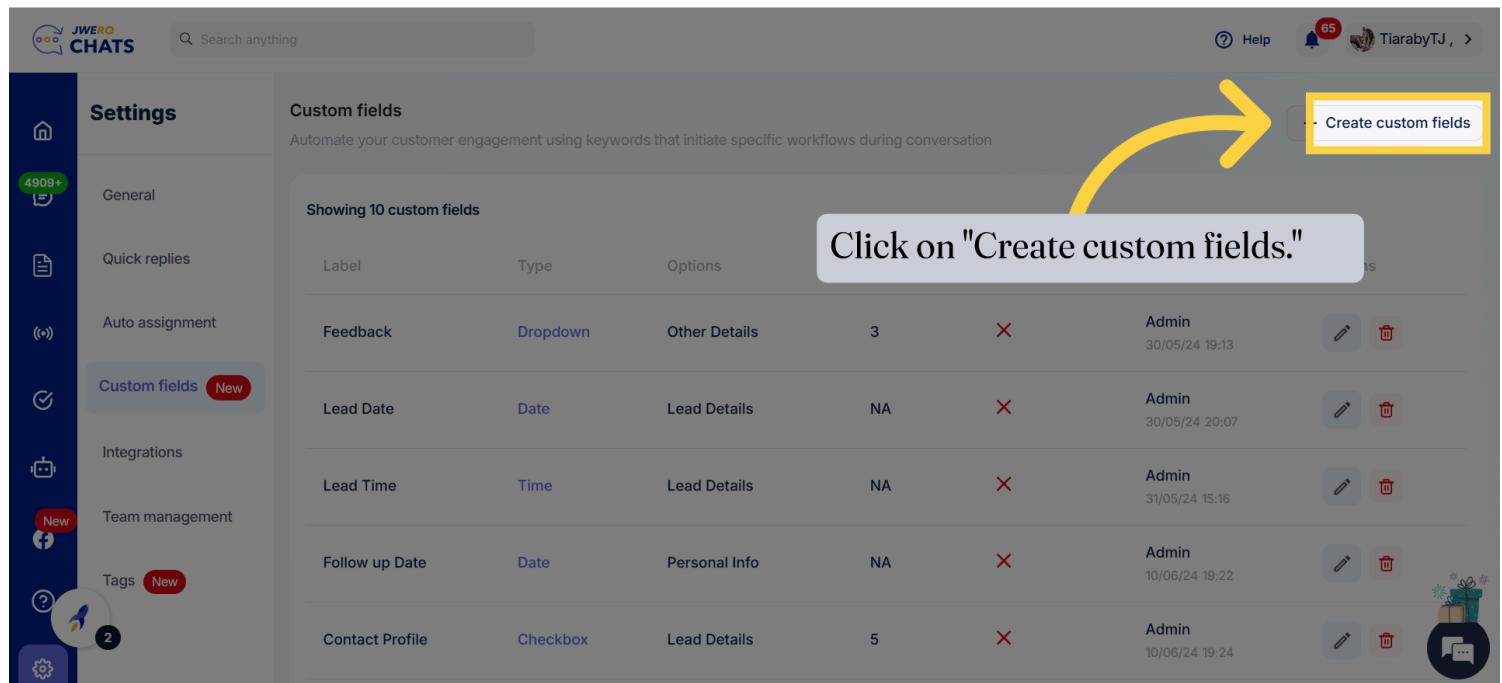
## 2. Click on the Settings icon to add the custom fields.

A screenshot of the JWERO CHATS dashboard. The top navigation bar includes the logo, a search bar, and user info. Below is a summary section with metrics: Total chats (16793), Tasks pending (53), Total contacts (38978), and Response rate (52.01%). A 'Your channels' section lists WhatsApp, Messenger, Instagram, Webchat, Commerce, and Ads manager, all connected. Under 'Quick actions', there's a callout box with the text 'Click on the Settings icon to add the custom fields.' A yellow arrow points from this text to a gear icon in the bottom-left corner of the dashboard. Other visible icons include a file, a new message, and a QR code generator. The bottom navigation bar includes links for WhatsApp business API, Status, Quality rating, and Daily messaging limit.

## 3. Click on "Custom fields".



#### 4. Click on "Create custom fields."



#### 5. Enter the logical name to the field which reflects the purpose.

JWERO CHATS

Search anything

Help 65 TiarabyTJ , >

Settings

Custom fields

Showing 9 custom fields

General

Quick replies

Auto assignment

Custom fields

Lead Date

Feedback

Field type

Contact info

Created by

Actions

Admin 30/05/24 20:07

Admin 31/05/24 15:16

Admin 10/06/24 19:22

Admin 10/06/24 19:24

Admin 08/07/24 14:43

New

Team management

Tags New

Contact Profile

Issue test

Checkbox

Contact Details

2

Create field

Enter the logical name to the field which reflects the purpose.

## 6. Select Field Type

JWERO CHATS

Search anything

Help 65 TiarabyTJ , >

Settings

Custom fields

Select module

Contact info

Field settings

Mandatory field

Enabling this will mark the field as a required field

Do not allow duplicate values

Field type

Text field

Text field

Number

Date

Time

Multi select

Pick list

Create field

Created by

Actions

Admin 30/05/24 20:07

Admin 31/05/24 15:16

Admin 10/06/24 19:22

Admin 10/06/24 19:24

Admin 08/07/24 14:43

New

Team management

Tags New

Contact Profile

Issue test

Checkbox

Contact Details

2

Select the field type from the available options as per your requirement.  
I'm selecting "Pick list" for the demonstration.

## 7. Select the module under which you want the field to be displayed.

Select the module under which you want the field to be displayed.

Settings      Custom fields

Contact info

Add properties

Pick list option 1      Pick list option 2

+ Add option

Field settings

Mandatory field

Create field

Created by      Actions

Admin      30/05/24 20:07

Admin      31/05/24 15:16

Admin      10/06/24 19:22

Admin      10/06/24 19:24

Admin      08/07/24 14:43

## 8. Module options

Select the Module from the available options. I'm selecting "More actions" for demonstration.

Settings      Custom fields

Contact info

Account details

Address info

Contact info

Lead details

More

More actions

Other details

Personal info

Created by      Actions

Admin      30/05/24 20:07

Admin      31/05/24 15:16

Admin      10/06/24 19:22

Admin      10/06/24 19:24

Admin      08/07/24 14:43

## 9. You will get the option to create a list after selecting "Pick list" as the field type.

You will get the option to create a list after selecting "Pick list" as the field type.

Settings      Custom fields

Showing 9 custom fields

Add properties

Pick list option 1      Pick list option 2

0/32      0/32

+ Add option

Created by      Actions

Admin      30/05/24 20:07

Admin      31/05/24 15:16

Admin      10/06/24 19:22

Admin      10/06/24 19:24

Admin      08/07/24 14:43

## 10. Enter the list label as per your requirement up to 32 characters.

Enter the list label as per your requirement up to 32 characters.

Settings      Custom fields

Showing 9 custom fields

Add properties

Pick list option 1      Pick list option 2

Good      4/32      Poor      4/32

+ Add option

Field settings

Mandatory field

Enabling this will mark the field as a required field

Created by      Actions

Admin      30/05/24 20:07

Admin      31/05/24 15:16

Admin      10/06/24 19:22

Admin      10/06/24 19:24

Admin      08/07/24 14:43

## 11. Click on "Add option" to add more options to the list.

Click on "Add option" to add more options to the list.

Note : You can add up to 10 options to the list.

## 12. Enter all the options details.

Enter all the options details.

## 13. Select this option if you want to mark the field as mandatory.

Select this option if you want to mark the field as mandatory.

Custom fields

Lead Date

Lead Time

Follow up Date

Contact Profile

Created by

Actions

Admin 30/05/24 20:07

Admin 31/05/24 15:16

Admin 10/06/24 19:22

Admin 10/06/24 19:24

Admin 08/07/24 14:43

#### 14. Select this option if you want to restrict the user from creating duplicate records.

Select this option if you want to restrict the user from creating duplicate records.

Custom fields

Lead Time

Follow Up Date

Contact Profile

Created by

Actions

Admin 30/05/24 20:07

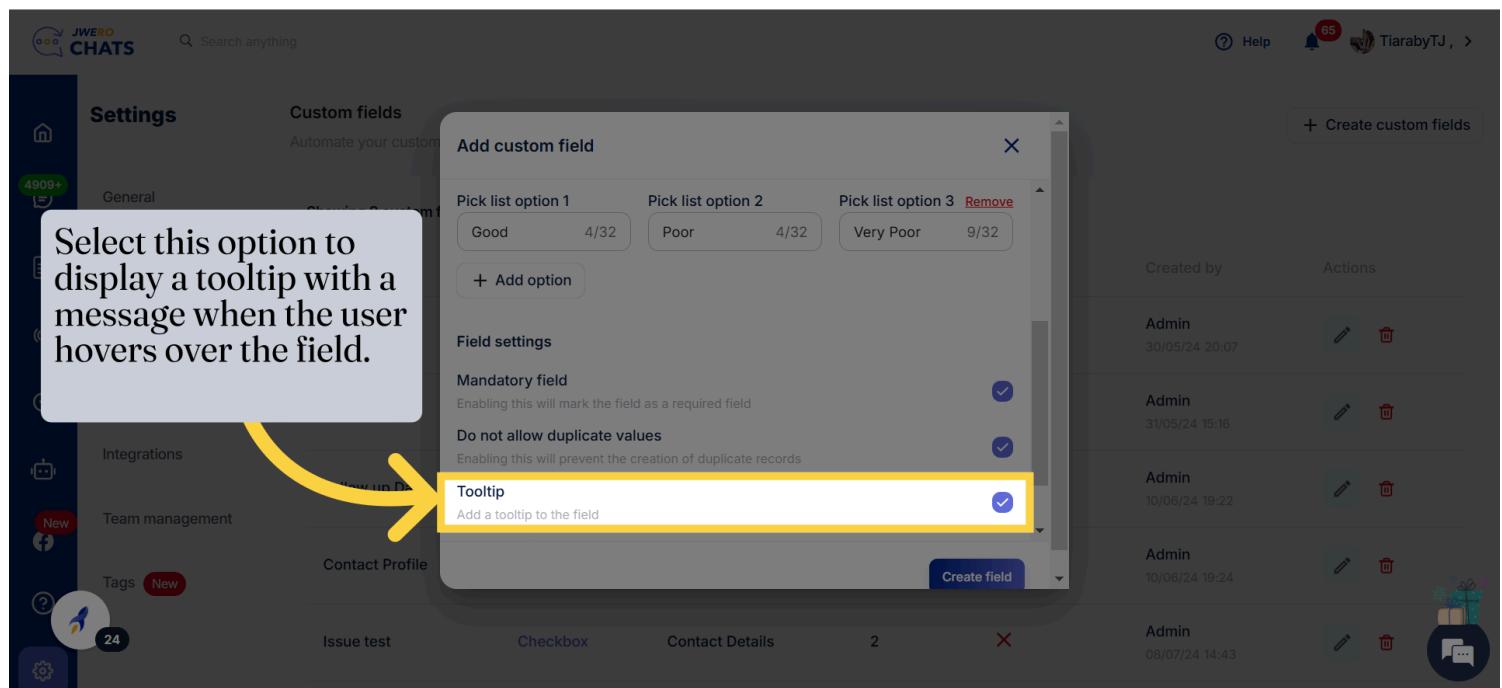
Admin 31/05/24 15:16

Admin 10/06/24 19:22

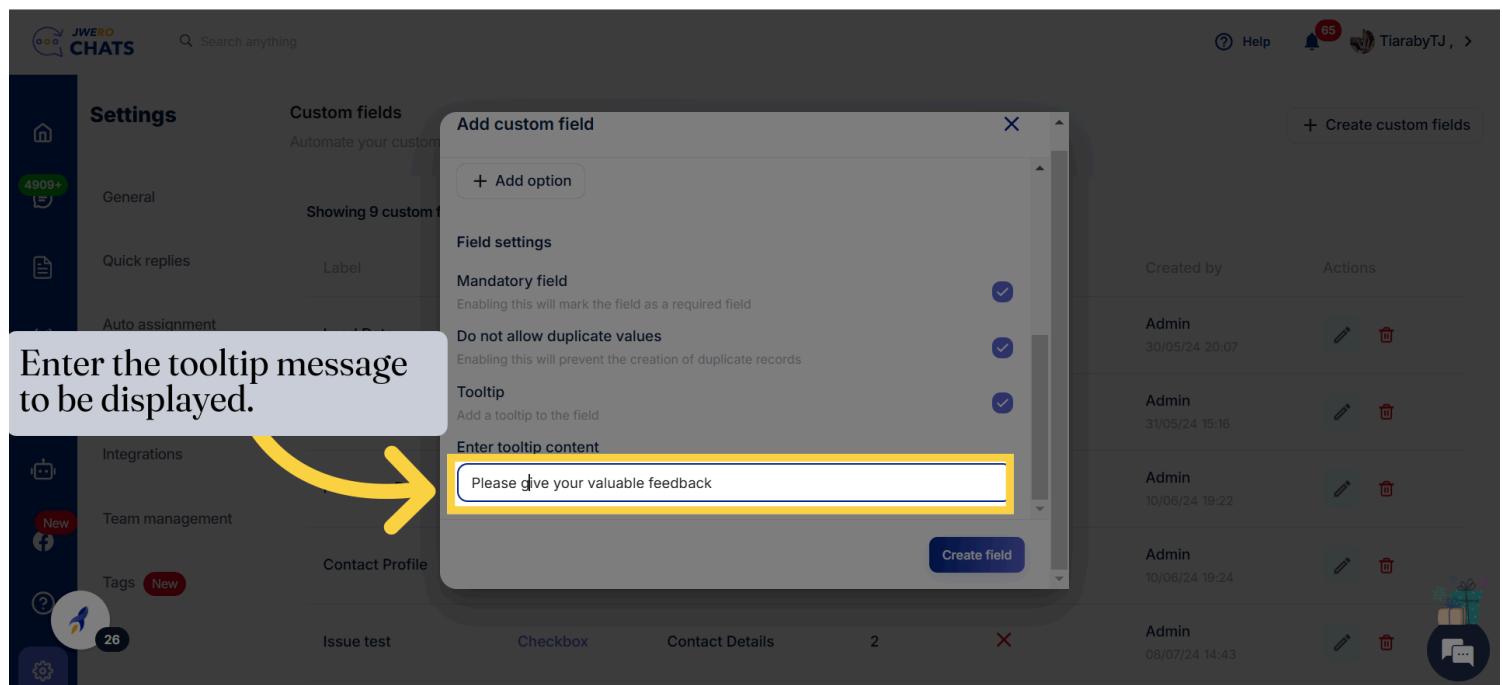
Admin 10/06/24 19:24

Admin 08/07/24 14:43

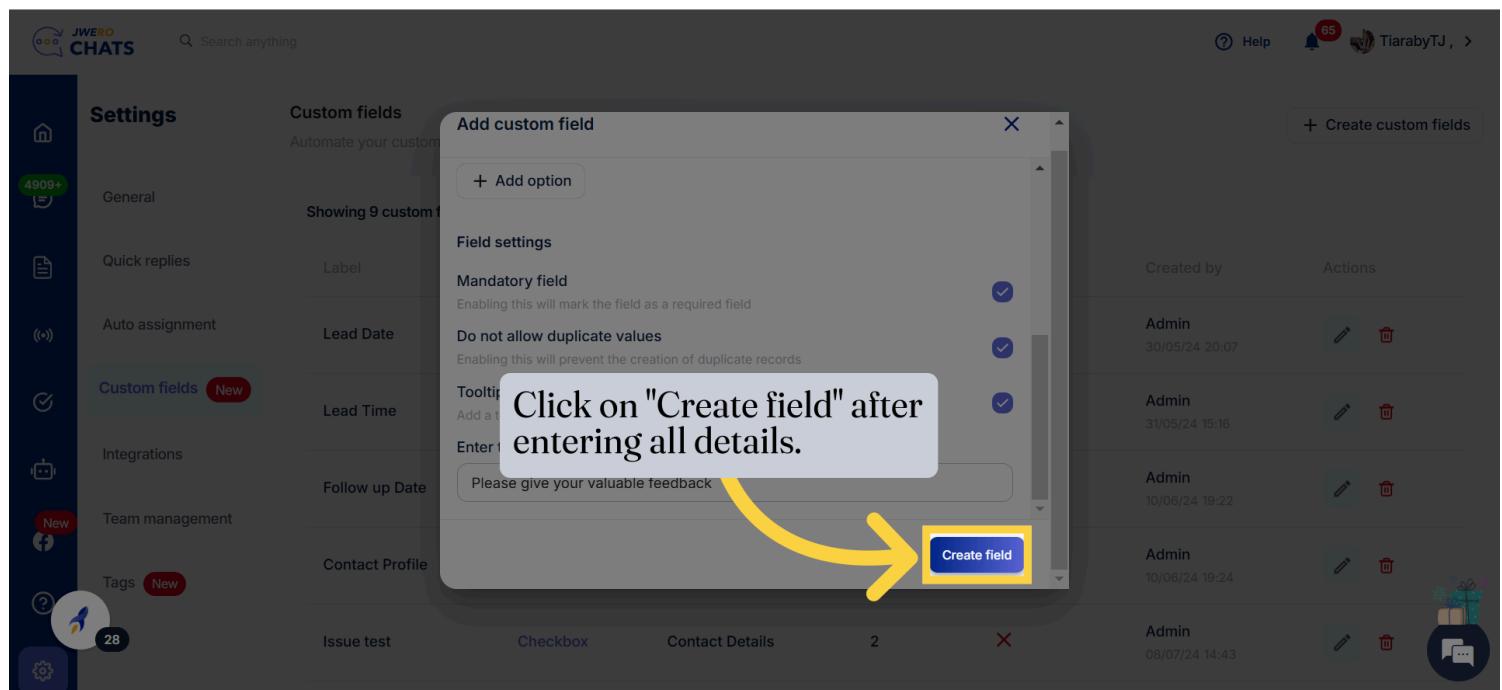
#### 15. Select this option to display a tooltip with a message when the user hovers over the field.



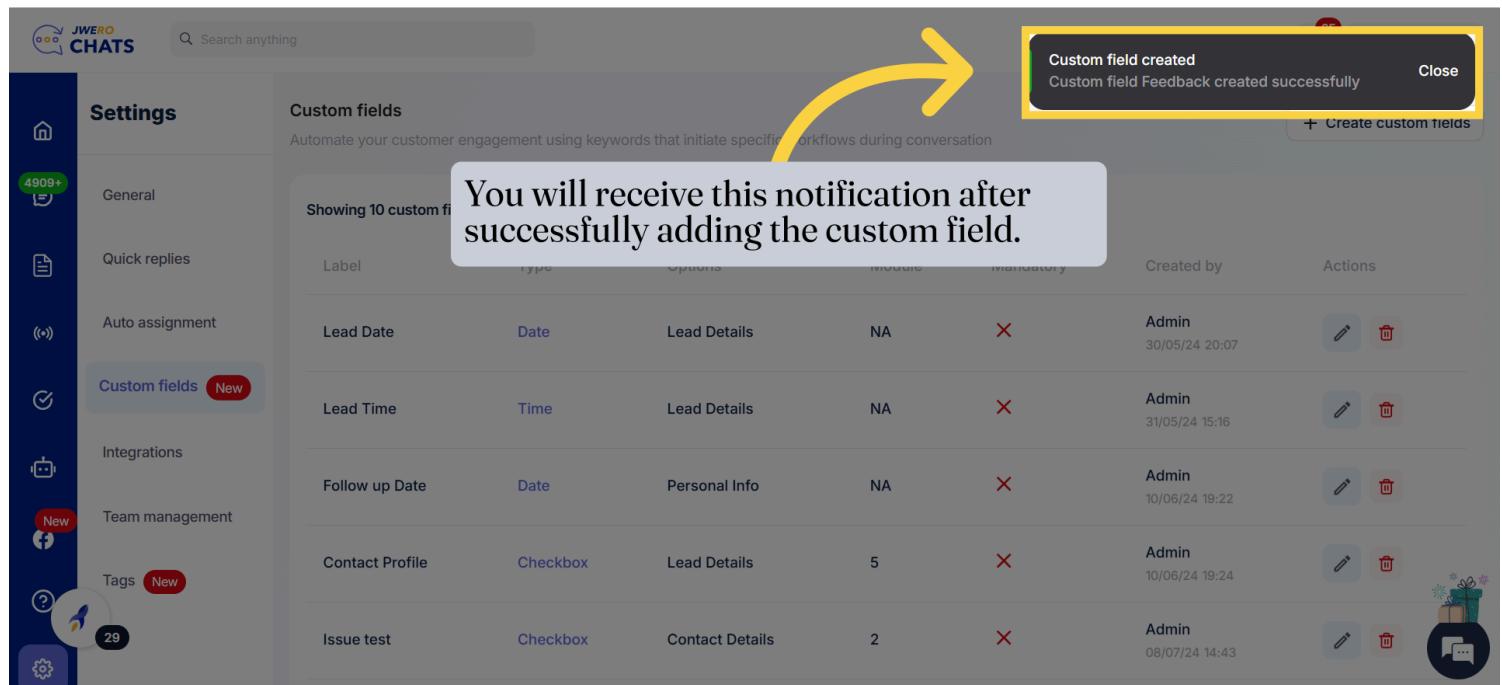
## 16. Fill "Please give your valuable feedback"



## 17. Click on "Create field" after entering all details.



## 18. You will receive this notification after successfully adding the custom field.



## 19. Custom field has been added.

Custom field has been added.

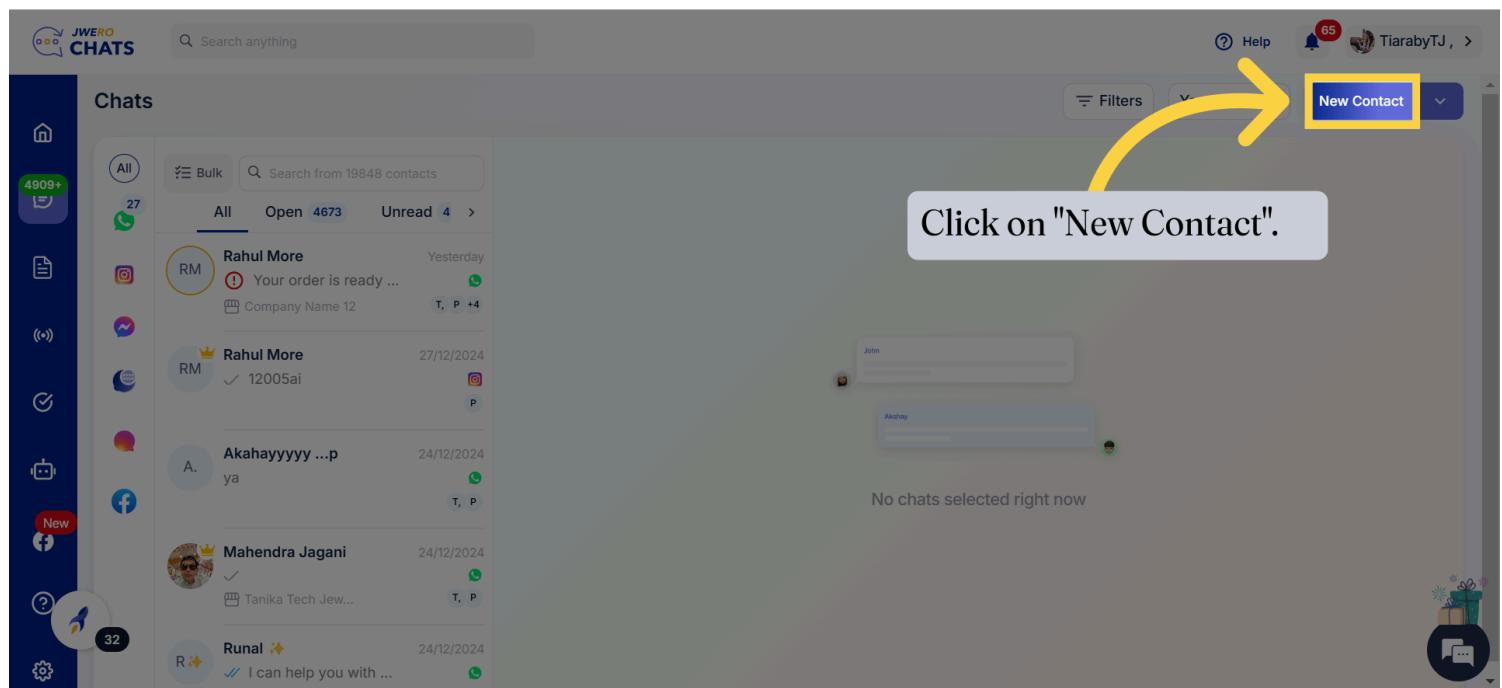
	Contact Profile	Checkbox	Lead Details	5	X	Admin	10/06/24 19:24		
Issue test	Checkbox	Contact Details	2	X	Admin	08/07/24 14:43			
more 1 test	Text	Personal Info	NA	X	Admin	19/10/24 14:11			
Referral name	Text	Contact Info	NA	X	Admin	19/10/24 14:21			
Test28	Text	Account Details	NA	X	Admin	28/10/24 11:02			
test	Dropdown	Personal Info	2	X	Admin	03/12/24 18:04			
Feedback	Dropdown	More Actions	3	✓	Admin	31/12/24 16:42			

## 20. Click on the chats icon to view the custom field.

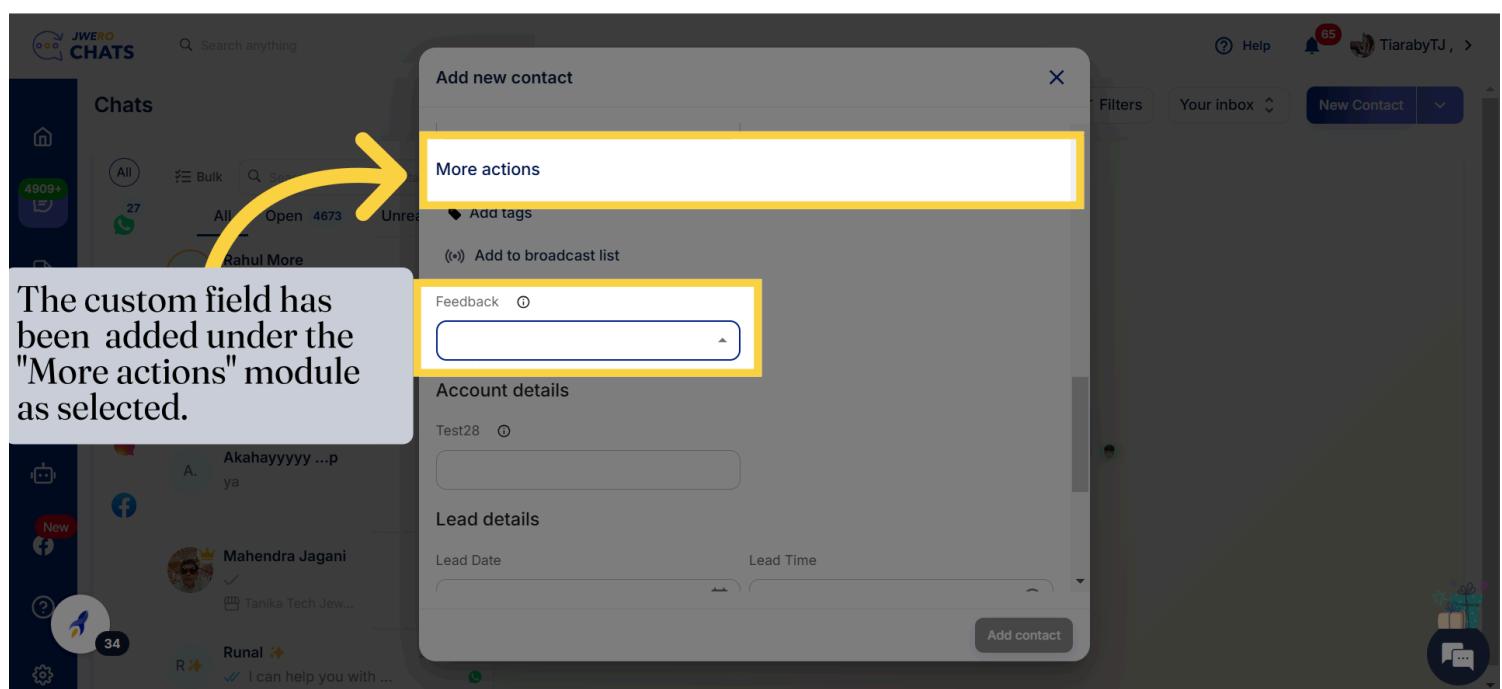
Click on the chats icon to view the custom field.

	Contact Profile	Checkbox	Lead Details	5	X	Admin	10/06/24 19:24		
Issue test	Checkbox	Contact Details	2	X	Admin	08/07/24 14:43			
Text	Personal Info	NA	X	Admin	19/10/24 14:11				
Text	Contact Info	NA	X	Admin	19/10/24 14:21				
Test28	Text	Account Details	NA	X	Admin	28/10/24 11:02			
test	Dropdown	Personal Info	2	X	Admin	03/12/24 18:04			
Feedback	Dropdown	More Actions	3	✓	Admin	31/12/24 16:42			

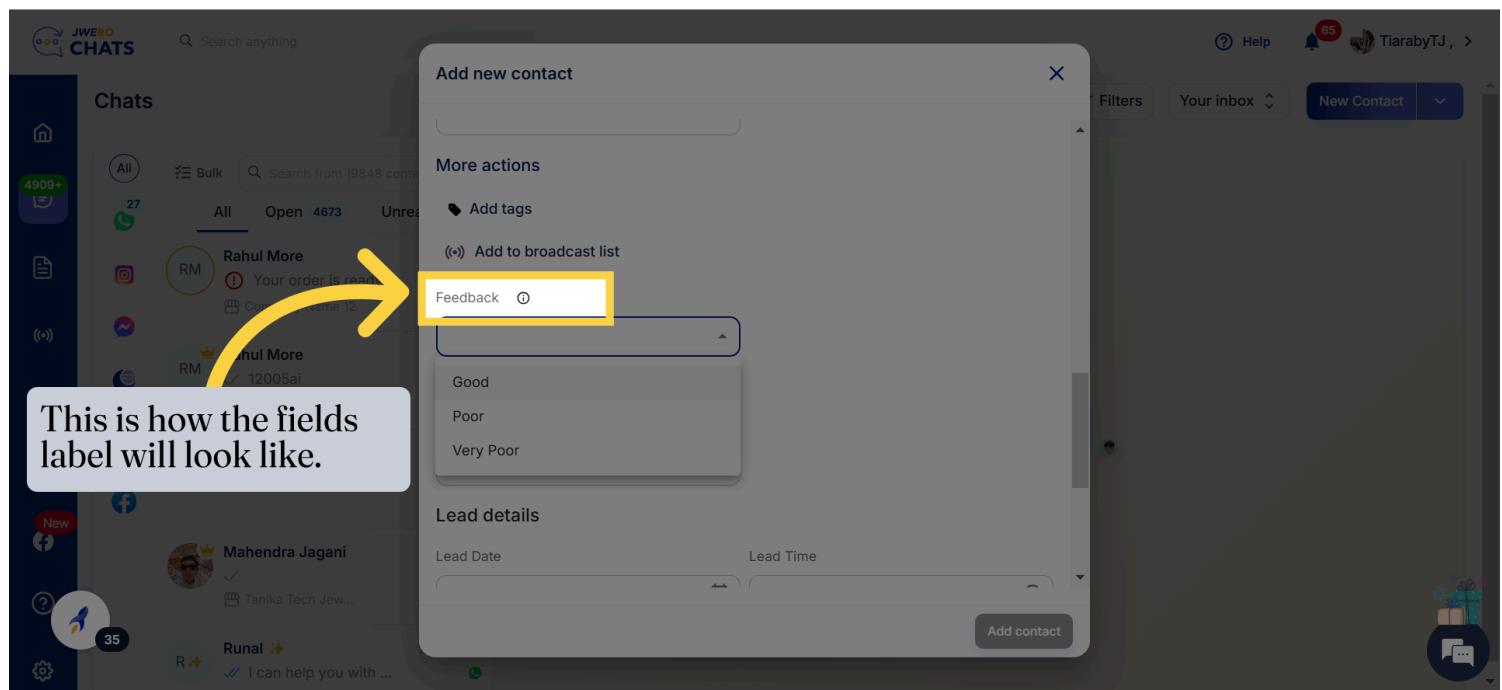
## 21. Click on "New Contact".



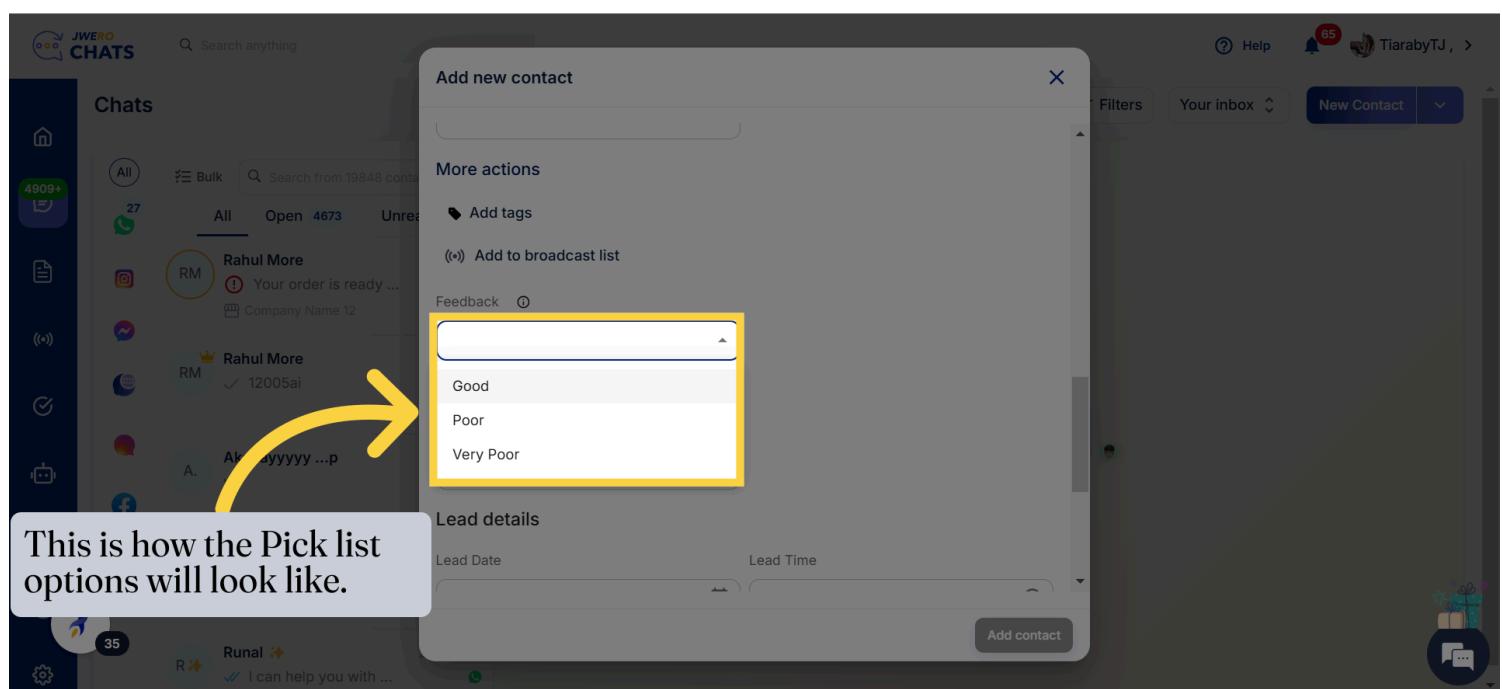
## 22. The custom field has been added under the "More actions" module as selected.



## 23. Field Label



## 24. This is how the Pick list options will look like.



## 25. To view the tool tip, click on this icon.

