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Shared Custom Fields

Note that Shared Custom Fields, unlike regular Custom Fields, have an additional `associations` field which defines which objects the Custom Field can be used on.

List all the Shared Custom Fields for your organization.

GET /custom_field/shared/

Example Request/Response

Create a new Shared Custom Field.

POST /custom_field/shared/

Example Request/Response

Update a Shared Custom Field.

PUT /custom_field/shared/{custom_field_id}/

You can rename it or update the options for a "choices" field type. The updated name will immediately appear in the Close UI and only valid values for the updated `choices` will be returned by the Lead/Contact/Custom Activity APIs.

The `type` value cannot be changed.

Example Request/Response

Delete a Shared Custom Field.

DELETE /custom_field/shared/{custom_field_id}/

The field will immediately disappear from any objects that it was assigned to and from any APIs related to those objects (Lead/Contact/Custom Activity APIs).

Example Request/Response

Associate a Shared Custom Field with a Lead/Contact/Opportunity/Custom Activity Type.

POST /custom_field/shared/{shared_custom_field_id}/association/

This endpoint accepts the following attributes:

- `object_type` – can be one of: `lead`, `contact`, `opportunity`, `custom_activity_type`.
- `custom_activity_type_id` – ID of the Custom Activity Type that you want to associate this Shared Field with. Only relevant if you chose the `object_type` of `custom_activity_type`.
- `editable_with_roles` – list of `Roles` that can edit the values of this Field on the given object. Note that this is a per-association setting, meaning that editing of the Shared Custom Field can be restricted on one object and not restricted on another.
- `required` – whether a value *must* be provided for this Field on the given object. Only relevant if you chose the `object_type` of `custom_activity_type`. Note that this is a per-association setting, meaning that this Shared Custom Field can be required on one object and not required on another.

Example Request/Response

Update an existing Shared Custom Field Association.

PUT /custom_field/shared/{shared_custom_field_id}/association/{object_type}/

You can change the `required` or the `editable_with_roles` attributes. Everything else cannot be changed.

The `object_type` in the URL can be either:

- `lead` when editing the association with the Lead object.
- `contact` when editing the association with the Contact object.
- `opportunity` when editing the association with the Opportunity object.
- `custom_activity_type/<cat_id>` when editing the association with a specific Custom Activity Type.

Example Request/Response

Disassociate a Shared Custom Field from a Lead/Contact/Custom Activity Type.

DELETE /custom_field/shared/{custom_field_id}/association/{object_type}/

The field will immediately disappear from to objects for which you're deleting the association (i.e. one of Lead/Contact/Custom Activity APIs).

The `object_type` in the URL can be either:

- `lead` when deleting the association with the Lead object.
- `contact` when deleting the association with the Contact object.
- `opportunity` when editing the association with the Opportunity object.
- `custom_activity_type/<cat_id>` when deleting the association with a specific Custom Activity Type.

Example Request/Response