10. Clients Custom Fields

The **Clients custom fields** section allows administrators to define additional, customizable data fields that appear on client profiles across the system. These fields let you extend the standard client model with business-specific attributes without changing core logic.

Custom fields are useful for capturing extra information such as internal classifications, preferences, tags, or any domain-specific data required by your workflows.

This section is located under **Settings → Configurations → Clients custom fields**.

What You Can Do

1. Create new custom fields for client profiles
2. Define how each field is filled in (free text, single choice, or multiple choice)
3. Edit or remove existing custom fields
4. Control which custom attributes are available consistently across all clients
5. Reorder custom fields using drag & drop
6. Control the display order of custom fields on client profiles

Once created, custom fields appear:
on the **Client profile** view
in **client edit forms**
consistently across all modules that display client details

Custom Fields List

The main table displays all configured client custom fields with the following information:

1. **Field name** – The label shown to users on client profiles
2. **Type** – The input type used to capture data:
   Input – Free-text field
   Select – Single-choice dropdown
   Multi-select – Multiple-choice selector
3. **Options** – For Select and Multi-select fields, the list of available values
4. **Actions**
   ✏ Edit – Modify the field configuration
   🗑 Delete – Remove the custom field

> **Display behavior**
> Field Label is shown exactly as entered (including capitalization).

> Field Name does not affect how values are displayed to users.
> Field order in the list defines the order shown on client profiles.

Adding a Client Custom Field

To create a new custom field:

1. Click **+ Add** in the top-right corner.
2. In the **Add client custom field** panel:
   Name – Internal field name.
   Used as the base identifier and for auto-generating the Label.
   Type – Choose one of:
   Input
   Select
   Multi-select
3. If **Select** or **Multi-select** is chosen, define the allowed options.
   Label – User-facing label shown on client profiles.
   Auto-filled from Name but can be edited manually.
4. Click **Save** to apply the changes.

> **Validation rules**
> Name is mandatory.
> Label is mandatory (auto-filled if not edited).
> Type is mandatory.
> Select and Multi-select fields require at least one option.
> Fields cannot be saved if required values are missing.

The new field becomes immediately available on client profiles.

Editing or Deleting Fields

Edit – Click the pencil icon to update the field name, type, or options.
Changes made during editing are applied immediately after saving.
Delete – Click the trash icon to permanently remove the field.

> Deleting a custom field removes it from all client profiles. Existing values stored in that field will no longer be accessible.

Ordering custom fields

Custom fields can be reordered using drag & drop in the list.
The defined order controls how fields appear on client profiles and edit forms.

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