Brand Templates - Organization Custom Fields

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Overview

Sometimes a brand needs to have their own top-level custom fields for organizations. These can be created once in Dashboard, then each organization can have their own values input, and can use those custom field shortcodes like any others. Organization Custom Fields are separate from Contact Custom Fields.

> This article will review:
> - Settings and Navigation
> - Create an Organization Custom Field
> - Using the Custom Field Shortcodes

Settings and Navigation

Go to **Dashboard > Tools > Configuration.**

At the bottom of the **Settings** section, find the **Custom Fields** section. Click **Manage...**

Custom Fields

Organizations

Manage...

Create an Organization Custom Field

The grid looks like the regular custom field grids and works the same way. You can edit or add custom fields. Instead of deleting, edit and make the custom field inactive. You can create categories and organize the fields that way - just click the Categories tab in the top right corner to edit those.

Custom Fields :: Organizations   [Organization] | [Categories]

Page 1 of 1 (10 items)

Add...	Name	Active?	Required?	Order	Field Type	Category
Edit	Google Business Page	Yes	No	2	String	Website Links
Edit	LinkedIn	Yes	No	1	String	Website Links
Edit	Legal Entity Name	Yes	No	1	String	Important stuff

You also have the same field type options. Set an order, mark as required, and add help text if you want.

Create a Custom Organization Field

Name*

Legal Entity Name

☑ Active?

☑ Required?

Order*

1

Category

None ▼

☐ Show above the fold on details?

Field Type*

String ▼

☐ Unlimited text?

Help Text

Once those are created, they'll see accessible on the organization edit page (**Dashboard > Tools > Organizations > Edit**).

At the bottom of the organization edit page, you'll see the fields arranged in tabs grouped by their categories and you can fill them out for that organization. Any custom field without an assigned category will be found in the **Other** tab.

Custom Fields

Important Items   Other Website Links   Other

Integer Test - BB

Tell us important stuff

Test Date - BB

Legal Entity Name

DBA

> ℹ In addition to any Organization Custom Fields that your brand creates, ServiceMinder provides built-in fields for common public-facing links in **Control Panel > General > Links**. These include your business website, social media pages (e.g., Facebook, Instagram, LinkedIn), and popular review sites (such as Google, Yelp, and Angi).

Using the Custom Field Shortcodes

Looking to use these custom fields in a template? When viewing the custom field list, click the name of the custom field to view the details. On this page you can view and copy the shortcode for use in emails or other correspondence.

Custom Organization Field | Legal Entity Name   [Edit] [Delete]

Name	Legal Entity Name	Shortcode	{organization.cust_legalentityname}
Active?	Yes	Form Field	cust_legalentityname
Required?	No	Phase	Any Phase
Above-the-Fold	No	Help Text	DBA
Order	1	Created	4/1/2025 11:56a
Field Type	String	Last Updated	4/1/2025 11:56a

If the field value is a URL, you can add that shortcode right into the URL field for when inserting a hyperlink in a template.

URL
{organization.cust_linkedin}

Text
Find us on LinkedIn!

☐ Open in new tab

Insert