Brand Templates Custom Fields

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Overview

In **Control Panel > General** there are several "custom fields" already set up for common items like Google Review links, Facebook links, and more. But 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.

Settings and Navigation

Go to Dashboard > Tools tab > Configuration.

Scroll about halfway down the page to the Custom Fields section. Click Manage...

Custom Fields

Organizations Manage...

Create a Brand 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.

Custo	m Fields :: Organizations						Organization Categories
Page 1	of 1 (9 items) 🕜 🕘 📘 🕟 🕪						
<u>Add</u>	Name	Active?	Required?	Order	Field	і Туре	Category
Edit	Google Business Page	Yes	No		2	String	Website Links
Edit	Integer Test - BB	Yes	No		0	Integer	Important stuff
Edit	<u>Leah Test Field - drop down</u>	Yes	No		0	Dropdown	
Edit	LinkedIn	Yes	No		1	String	Website Links
Edit	OC honey shingle	Yes	No		0	Integer	
Edit	Owner Name	Yes	No		0	String	
Edit	<u>Tell us important stuff</u>	Yes	No		0	String	Important stuff
Edit	<u>Test Checkbox - BB</u>	No	No		0	Checkbox	Important stuff
Edit	<u>Test Date – BB</u>	Yes	No		0	Date	Important stuff
Page 1	of 1 (9 items)						

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

Create a Custom Organ	ization Field
Name*	Legal Entity Name
Active	
Required	
Order*	1
Category	Important stuff ▼
Field Type*	String V
Unlimited Text?	
Help Text	DBA

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

At the bottom of the page, you'll see the fields arranged in tabs for categories and you can fill them out for that org.

Custom Fields				
categories	Important stuff We	ebsite Links	Other	
	Integer Test – BB			
	Tell us important stuff			
fields				
	Test Date - BB			
	Legal Entity Name			
		DBA		

Using the Shortcodes

Want to use these shortcodes in an email 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. If the field value is a URL, you can add that shortcode right into the URL field for a link in a template.

Custom O	rganizat	tion Field Legal Entity No	ame
	Name	Legal Entity Name	
Active? Required?		Yes	
		No	
	Order	1	
	Field Type	String	
	Shortcode	{organization.cust_legalentityname}	
	Shortcode Form Field	{organization.cust_legalentityname} cust_legalentityname	
	Shortcode Form Field Phase	(organization.cust_legalentityname) cust_legalentityname Any Phase	
	Shortcode Form Field Phase Help Text	(organization.cust_legalentityname) cust_legalentityname Any Phase DBA	
	Shortcode Form Field Phase Help Text Created	(organization.cust_legalentityname) cust_legalentityname Any Phase DBA 4/1/2025 11:56a	