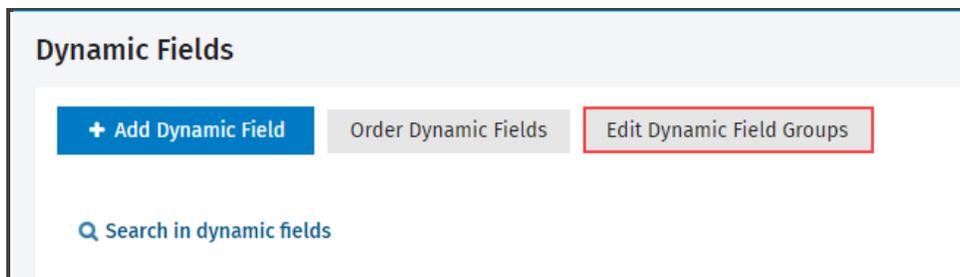## *Setting Up Contact Dynamic Fields*

You can add your own fields for use in Contacts and other CCH iFirm modules. This enables you to specify additional information that you want to store about your clients. You can then change the order in which dynamic fields display in a contact's profile. In addition, you can structure your dynamic fields into groups and include them on the Details screen.
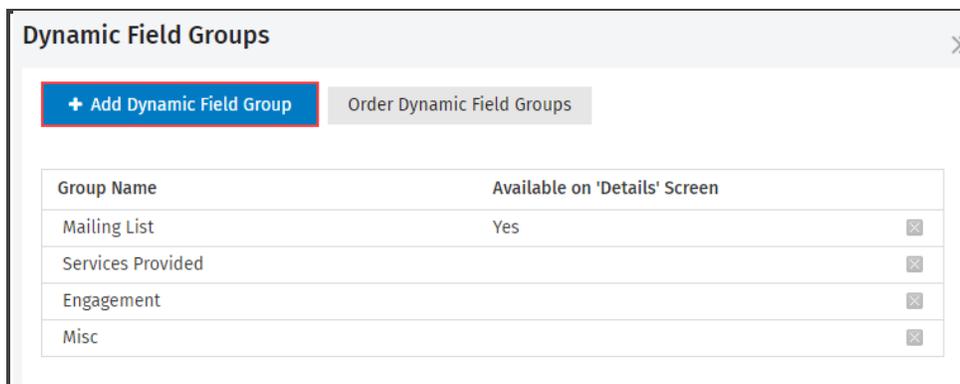
Dynamic Field Groups

If you are working with various Dynamic fields and wish to group them, you can create a dynamic field group category.

To create a dynamic field group:

1. From the Contacts Settings page, click **Dynamic Fields.**

2. CCH iFirm displays the Dynamic Fields page. Click the **Edit Dynamic Field Groups** button.

3. CCH iFirm displays the Dynamic Field Groups page. Click **Add Dynamic Field Group**.

4. CCH iFirm displays the Add Dynamic Field Group page, type the group name description, and select the checkbox if you want this dynamic field group available on the Details screen in contacts. Once the information is complete, click **Save**.

5. CCH iFirm returns to the Dynamic Field Groups page. Now you can create the dynamic fields.

You can add your own fields for use in Contacts and other CCH iFirm modules. This enables you to specify additional information that you want to store about your clients. You can then change the order in which dynamic fields display in a contact's profile. In addition, you can structure your dynamic fields into groups and include them on the Contact Details screen.

Dynamic Fields

To create a dynamic field:

1. From the Contacts Settings page, click **Dynamic Fields.**

2. CCH iFirm displays the Dynamic Fields page. Click **Add Dynamic Field**.

3. CCH iFirm displays the Add Dynamic Field page. Select your field type. Keep in mind that the display options will vary based on the option selected. The options include:

- Select (yes/no)
- Select (blank/yes/No)
- Text Field
- Text Area
- Date Field and
- User-Defined List

4. For this example, select **the blank/yes/no** option.

Add Dynamic Field

Field Type

- select (yes/no)
- select (blank/yes/no)
- text field
- text area
- date field
- user-defined list

5. Complete the remaining fields that now display.

- **Field Label** – The question you want to ask
- **Field Label Abbreviation** – An abbreviation for the question
- **Dynamic Field Group** – Allows you to categorize the question type
  Default Value – Allows you to indicate an answer to display by default

Field Type
select (blank/yes/no)

Field Settings

Field Label

Field Label Abbreviation

Dynamic Field Group
None

Default value

6. In the Security section, select the roles that can view and edit this dynamic field. For the purpose of this lesson, we will leave them as is. Note that dynamic fields based on Yes / No fields types will also have the functionality to send email reminders to members of your team.

Security

Viewable by roles

☑ Contacts - View Only
☑ Contacts - View, Add and Edit Contacts

Editable by roles

☑ Contacts - View Only
☑ Contacts - View, Add and Edit Contacts

7. In the Email section, you can set the behavior for when CCH iFirm will send an email, the email title and subject, and the body of the email.

Send an Email

No

Email Title

Email Subject

Email Text

8. Finally, select whether you want to include client contact details in the email, and if you need to send an email reminder to the client, partner, manager, or any of CCH iFIrm general users.

9. Once the preferences have been set, click **Save.**

Include client contact details in email

N

Send an email reminder to

- [ ] client
- [ ] client partner
- [ ] client manager
- [ ] Administrator
- [ ] General User
- [ ] Georgia Smith
- [ ] Megan Caldwell

Cancel   ✔ Save

10. IFirm returns to the Dynamic Fields page.