Custom Name Fields

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Custom name fields can be used to define other customized items of information you may want to maintain for a particular name or group of names. Custom name fields allow you to create fields of information about your customers or vendors that you want to track and that CenterPoint doesn't already have a field for. Custom name fields are optional and you can have more than one assigned to a name. Lists and reports may be filtered by custom name fields.

For example, you may want to create a custom name field for a vendor that you make online payments to an account for and you want to store your login id and password information for that vendor's website on the Custom Name Fields tab or you want track the name of an employee's spouse. You can add the custom name field called "Website Login" or "Spouse's Name" and attach it only to the names, vendors, customers, or employees you want to track the information for.

Each custom name field you create is available for all names on your Names list. The information entered in **Setup** > **Names** > **Names** > **Custom Name Fields**, **Setup** > **Customers** > **Custom Name Fields**, **Setup** > **Vendors** > **Custom Name Fields**, or **Setup** > **Employees** > **Custom Fields** into the Custom Field Information column is unique for each name.

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Create a Custom Name Field

1. Select **Setup** > **Names**> **Custom Name Fields**. Click **New**. A new Custom Name Field can also be added from the Names screen by clicking on the Custom Fields button and then clicking the New button.

> Note: If the new field to be added is similar to an existing, you can highlight the similar item and click Copy instead of New.

2. In the **Abbreviation** box, enter up to ten characters of optional information that you can easily identify the custom name field by (for example, S for Spouse's Name or WSL for website login information, etc.).
3. In the **Name** box, enter up to 30 characters of required information that describes the custom name field (for example, Website Login or Spouse's Name).
4. In the **Custom Name Field Type** box, select the type of information this custom name field is, Date, Numeric, Percentage, or Text. For example, Website Login and Spouse's Name would be the type of Text.

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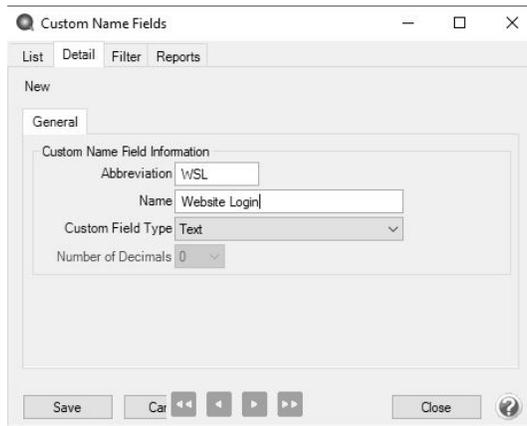
5. If the Custom Name Field Type is Numeric or Percentage, in the **Number of Decimals** box, select the number of decimals to display for the number or percentage.
6. Click **Save** to save the custom name field and return to the List tab, or click Close to save the custom name field and close the Custom Name Fields screen.

> Note: To return to the List tab without saving the custom name field, click Cancel. To close the Custom Name Fields screen without saving the custom name field, click in the upper-right corner.

Add Custom Name Field Information to a Name

1. Select **Setup** > **Names** > **Names**, **Setup** > **Customers**, **Setup** > **Vendors**, or **Setup** > **Employees**).
2. Select an existing **Name**, **Customer** or **Vendor**, and then click **Edit**.

> Note: A Custom Name Field can also be assigned when a new Name is being added to the system.

3. Select the **Custom Name Field** tab.
4. Select the line you want to add information to. In the **Custom Field Information** box, enter the specific information for this name.
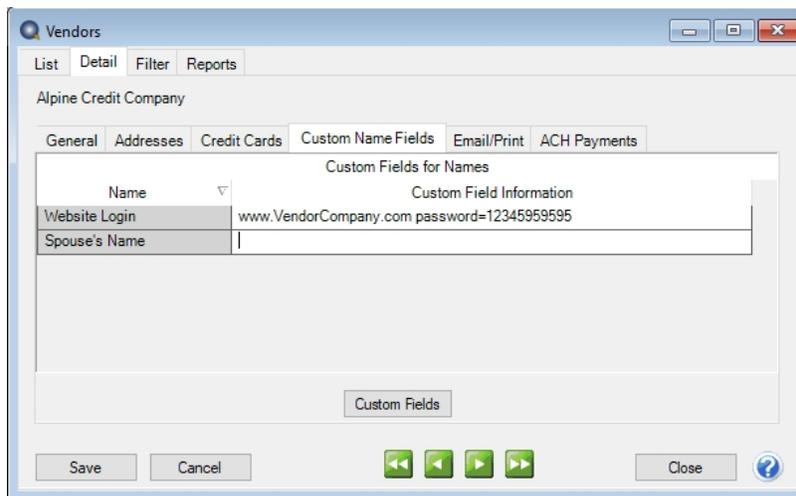
6. Click **Save** to save the name and return to the List tab, or click Close to save the name and close the Names screen.

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Edit an Existing Custom Name Field

1. Select **Setup** > **Names** > **Custom Name Fields**.
2. Select the custom name field you want to change, and then click **Edit**.

> Note: If you change the information in the Name box, past custom name field information is automatically linked to the new name. For example, if you change custom name field Open House to Invitation, your reports will no longer show custom name field Open House and any existing information for custom name field Open House is now part of custom name field Invitation.

3. The Custom Name Field Information appears. Edit or view the custom name field detail.
4. Click **Save** to save the custom name field and return to the List tab, or click Close to save the custom name field and close the Custom Name Fields screen.

Delete a Custom Name Field

1. On the **Setup** menu, point the **Names**, and then click **Custom Name Fields**.
2. Select the custom name fields you want to delete, and then click **Delete**

> Note: You cannot delete a record that is linked to other records in the system.

3. At the **"Are you sure you want the item deleted?"** message, click **Yes**.

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