How to Create Custom Fields

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Applies To: New PoliteMail Legacy PoliteMail

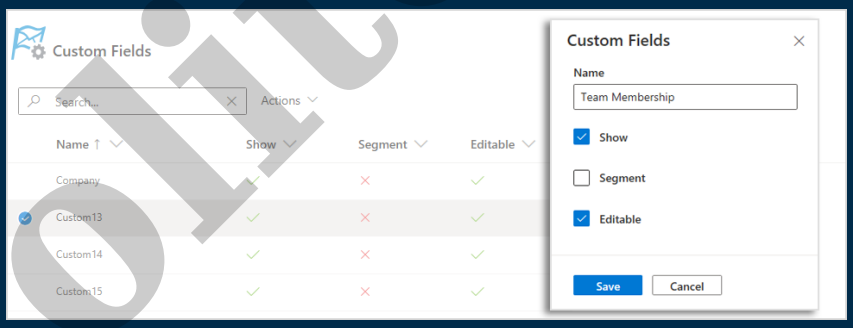
Version: 4.9+ 5.0+

Custom Fields can be used for further Personalization options. You can either add custom fields in PoliteMail, or import them from a CSV file when creating a mailing list. It is recommended to set up your custom fields in PoliteMail before importing your lists. We're going to use the example of "Team Membership" as a custom field.

Once created, Custom Fields can be reused for any number of campaigns, without affecting the metrics of previously sent messages that used the same Custom Field(s).

Setting up Custom Fields

1. Navigate to **POLITEMAIL**> **Account** (**Settings** in Version 4.9x) > **Custom Fields (Admin-only)**
2. **Click** on one of the blank custom fields. The custom fields dialog box will open and you'll be able to enter in the information. You can also edit existing custom fields using this method.



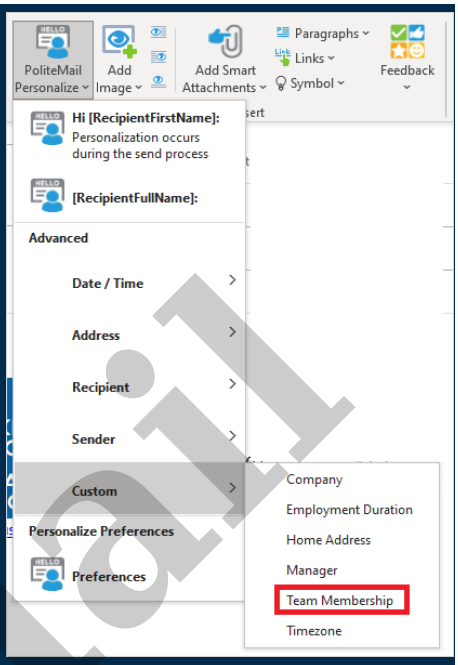
3. Name your new custom field, and then place check marks in the boxes to decide whether it should be shown in the default view (when you click on the Personalization option), able to be segmented for reports, or made editable (which means other users can change it). Once you've finished, click **Save** (**Update** in Version 4.9x).
4. Use the Data Type column in the Custom Fields list to select the data type (string, number, boolean, or date) of the Custom Field.
    a. Creating a Custom Field with the 'string' data type allows you to insert a url as well! If you have a unique url associated with each recipient, you can use personalization to insert a custom, personalized link for each one.
5. You now have your Custom Field ready to use.

PoliteMail

As long as the custom field correlates to a field on your imported list, it will be available to use under Personalization.

Select **PoliteMail Personalize** > **Custom** and select the field. PoliteMail will automatically insert the information when the message is sent,

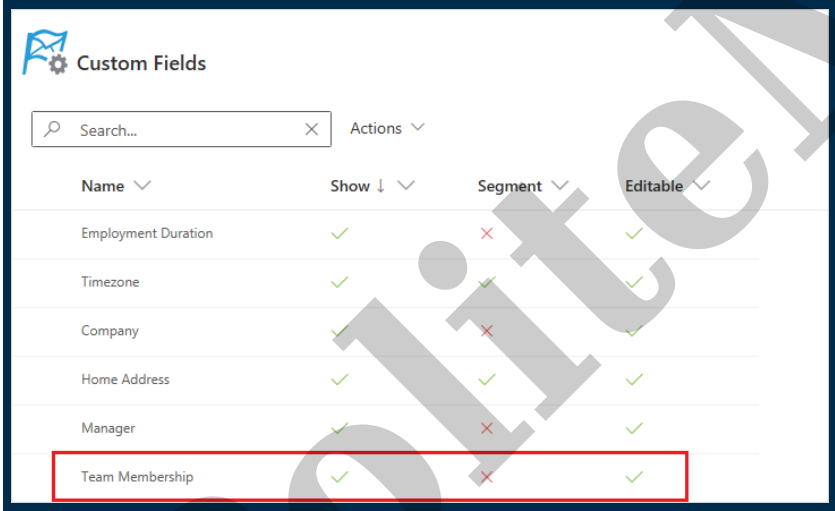
These custom fields that have "Show" checked, so they are displayed in this list when you click Custom.



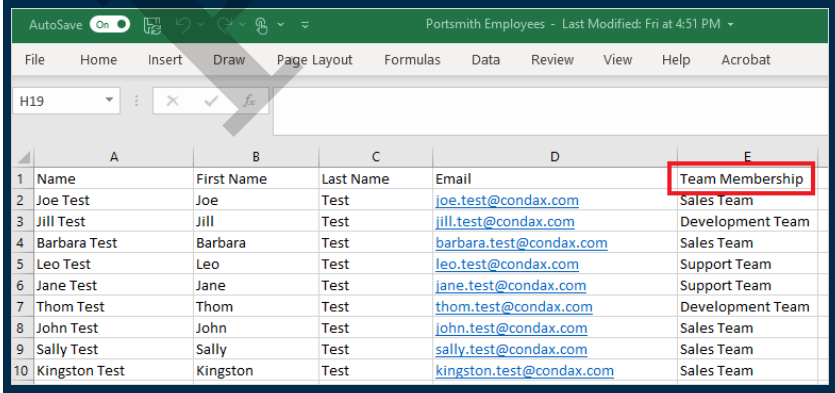
Using Custom Fields When Importing a List

Your Custom Field can also be used when importing a list. Make sure you have the Custom Field set up both in PoliteMail, and as a column in Excel before exporting it as a CSV. For this example, we'll create a Team Membership Custom Field in PoliteMail and then one in Excel.

How it looks in PoliteMail:



How it looks in Excel:

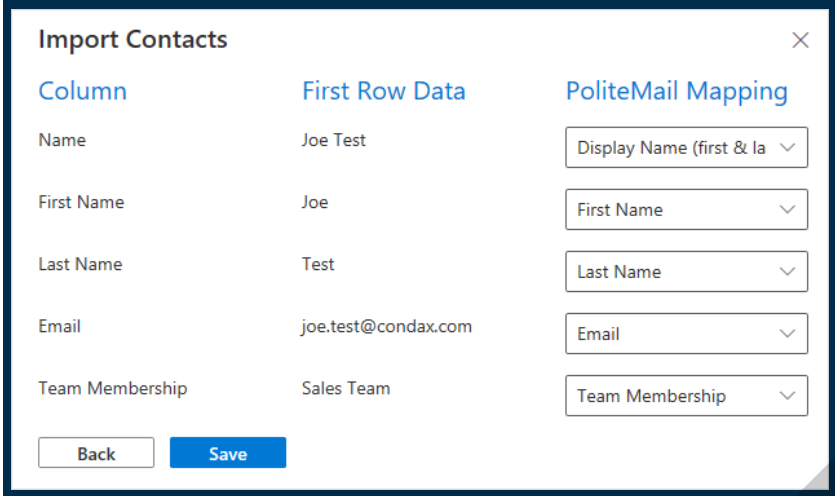


	A	B	C	D	E
1	Name	First Name	Last Name	Email	Team Membership
2	Joe Test	Joe	Test	joe.test@condax.com	Sales Team
3	Jill Test	Jill	Test	jill.test@condax.com	Development Team
4	Barbara Test	Barbara	Test	barbara.test@condax.com	Sales Team
5	Leo Test	Leo	Test	leo.test@condax.com	Support Team
6	Jane Test	Jane	Test	jane.test@condax.com	Support Team
7	Thom Test	Thom	Test	thom.test@condax.com	Development Team
8	John Test	John	Test	john.test@condax.com	Sales Team
9	Sally Test	Sally	Test	sally.test@condax.com	Sales Team
10	Kingston Test	Kingston	Test	kingston.test@condax.com	Sales Team

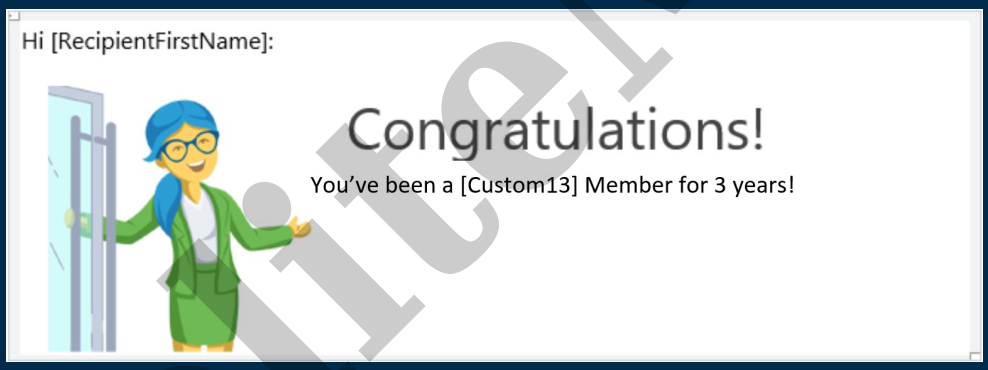
When you import, you'll be presented with an Import Contacts dialogue window. Make sure you have "Has Column Headers" checked so the imported mailing list will contain the headers you have created in Excel. You should see one for Team Membership. If it comes up as "do not import," click the pull-down menu to find the

PoliteMail

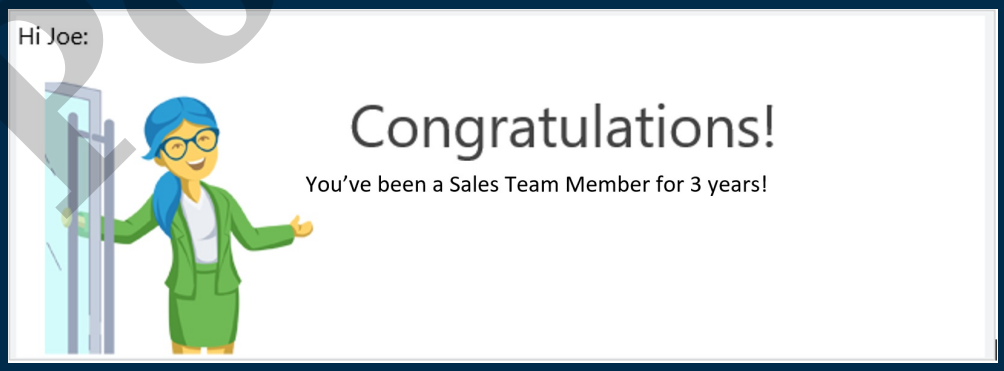
corresponding field.



When you send to this mailing list, use PoliteMail Personalize to add the custom fields. Here's how it looks before sending:



Here's how it looks for the recipient:



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