

Add your own fields

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Every firm tracks something of its own: where a client came from, an internal file number, a date that matters to you. **Custom fields** let an administrator add these to **contacts**, **cases** and **applicants**, with no help from us. Your team then fills them in like any other field.

The client («Daniela Ruiz») in this guide is **fictional**. Only administrators see **Settings** → **Custom fields**.

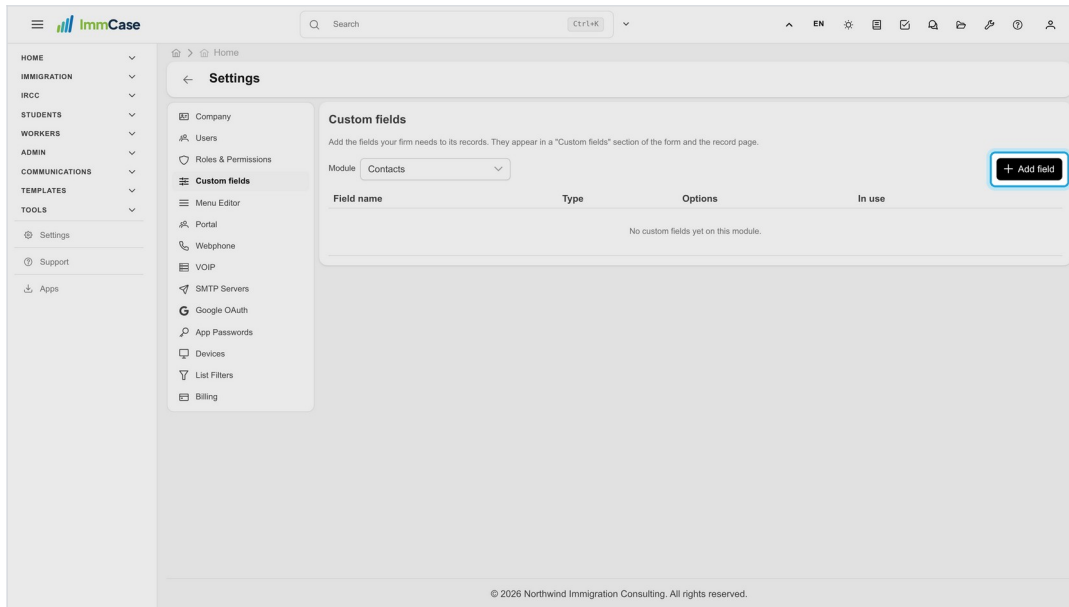
1. Open Custom fields

Click **Settings** at the bottom of the menu, then **Custom fields**.

The screenshot shows the ImmCase web application interface. On the left is a sidebar menu with categories like HOME, IMMIGRATION, IRCC, STUDENTS, WORKERS, ADMIN, COMMUNICATIONS, TEMPLATES, and TOOLS. The 'Settings' option is selected under the TOOLS category. The main content area is titled 'Settings' and contains several sections: 'Company' (with sub-items like Users, Roles & Permissions, Custom fields, Menu Editor, Portal, Webphone, VOIP, SMTP Servers, Google OAuth, App Passwords, Devices, List Filters, and Billing), 'Identity' (with fields for Company Name, Legal Name, Tax ID, and Registration Number), 'Contact' (with fields for Email, Phone, and Website), 'Address' (with fields for Street Address, City, State / Province, Postal Code, and Country), and 'Branding' (with fields for Logo, Logo (dark mode), and Favicon). The 'Custom fields' option in the sidebar is highlighted with a blue box.

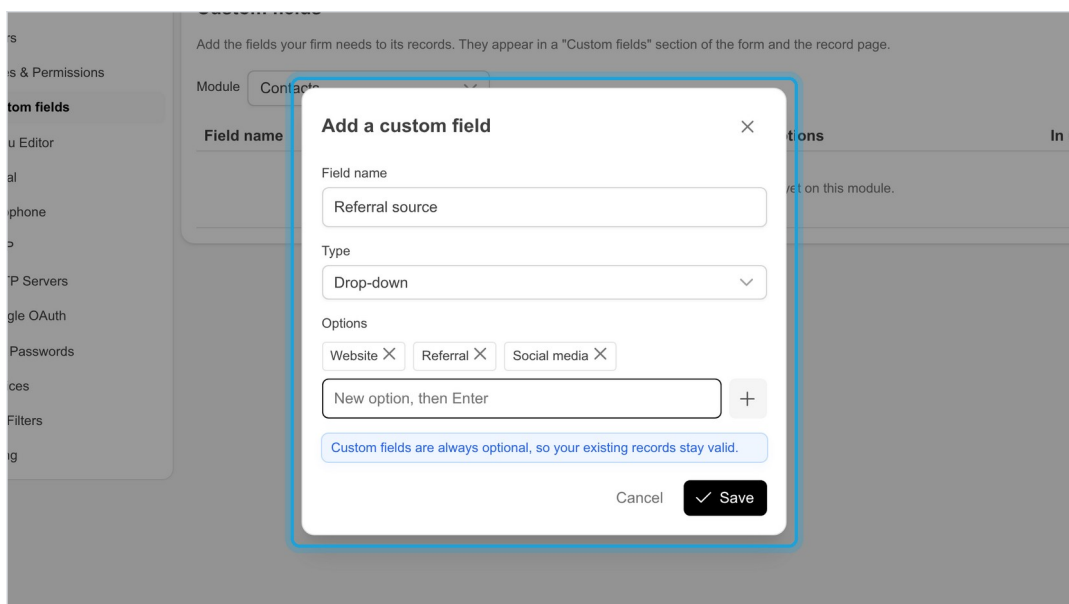
2. Pick where it goes

Under **Module**, choose **Contacts**, **Cases** or **Applications** (the people on a case). Then click **Add field**.



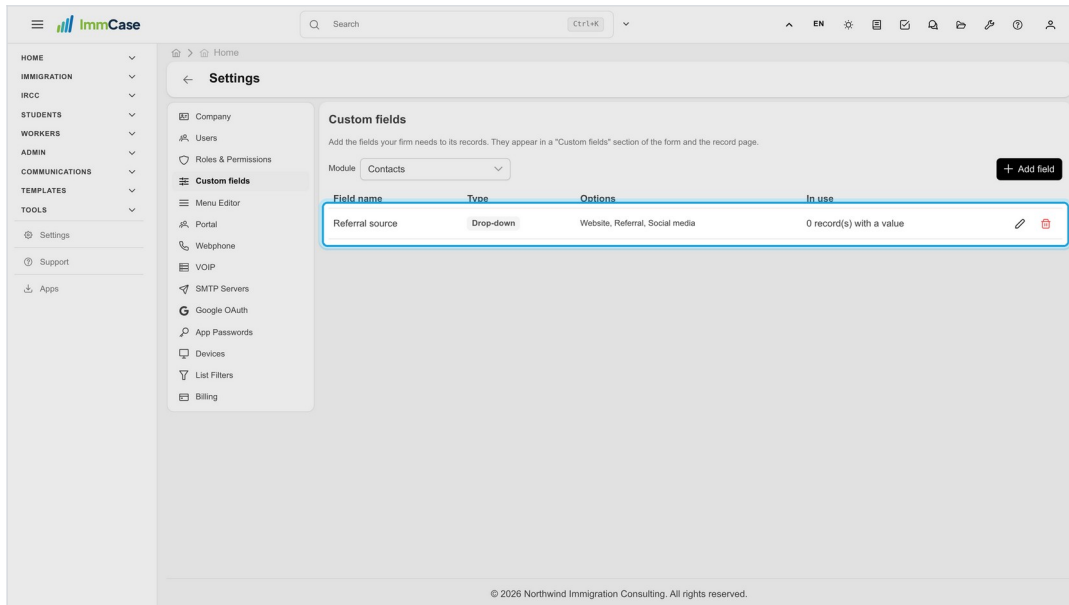
3. Name it and choose its type

Give the field a name and a type: **Text**, **Long text**, **Number**, **Date**, **Yes / No** or **Drop-down**. For a drop-down, type each choice and press **Enter**.



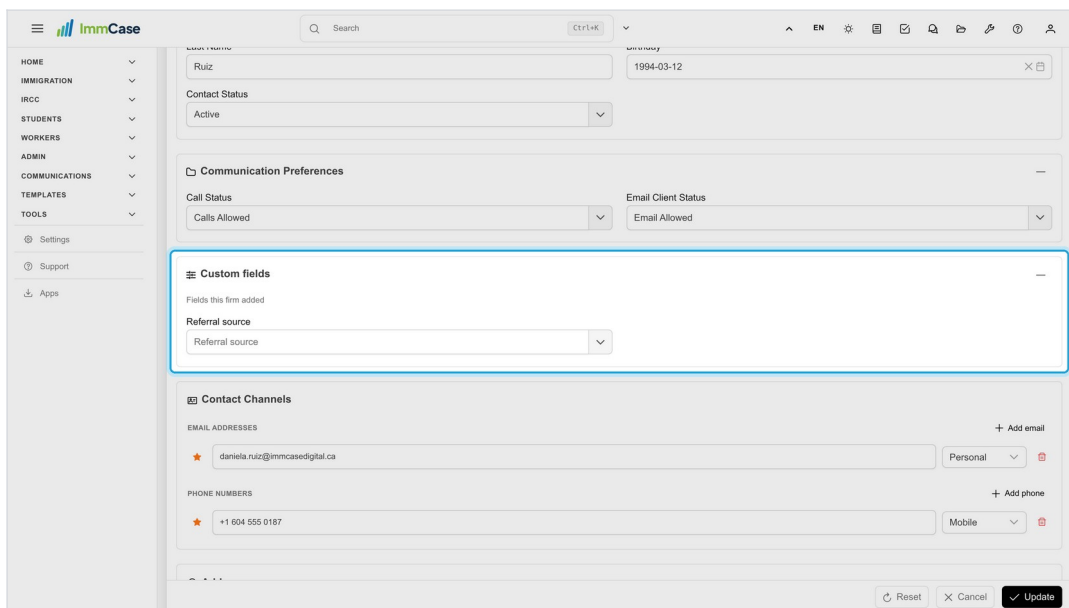
4. Save

Click **Save**. The field is listed with its type and choices, and **In use** shows how many records have a value.



5. Fill it in

Open a record and click **Edit**. Your fields are in their own **Custom fields** section of the form.



6. See it on the record

Click **Update**. The value now shows on the record page, and the change is in the record's history on the right.

1 empty field hidden

Basic Information

First Name	Daniela	Last Name	Ruiz
Age	32	Birthday	1994-03-12

Custom fields

Fields this firm added

Referral source	Referral
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Contact Channels

EMAIL ADDRESSES

- ★ daniela.ruiz@immcasedigital.ca Personal

PHONE NUMBERS

- ★ +1 504 555 0187 Mobile

NEXT STEP
Nothing planned

Referral
Age

Good to know

- **Always optional.** Custom fields never block saving, so the records you already have stay valid.
- **Choose the type carefully:** it can't be changed later. Drop-down choices can be renamed, but not removed once records may use them.
- **Documents** don't go in a field: put them in the case's document checklist or the client's File Manager.

Questions: hello@immcase.com.