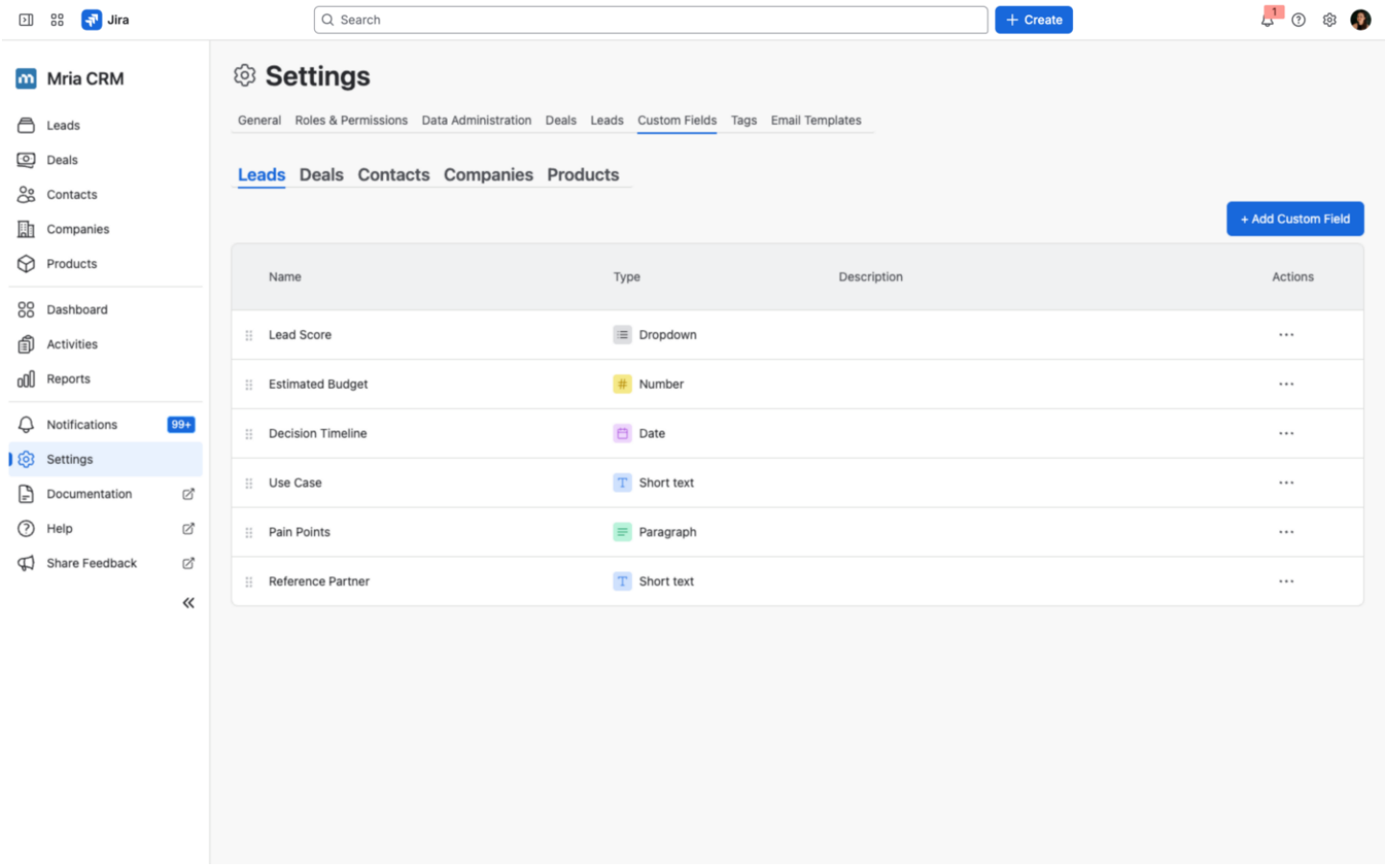
Custom Fields

Settings · https://mriacrm.com/docs/custom-fields/

Custom Fields let you extend Leads, Deals, Contacts, Companies, and Products with fields that fit how your team actually sells — deal probability, decision timeline, account tier, anything you need to track that isn't covered by the standard fields.

Custom Fields are configured under **Settings → Custom Fields**, on five sub-tabs — one per entity.



Supported field types

Twenty types are available. Ten hold a value of their own; the other ten link the record to another Deal, Lead, Contact, Company or Product. The right type makes filtering, exporting, and reporting much easier later, so pick deliberately.

Type	Use for
Short text	Up to 255 characters. Names, codes, one-line notes.
Paragraph	Multi-line free text. Pain points, meeting notes, descriptions.
Dropdown	Single choice from a fixed list of options you define.
Multi-select	Multiple choices from a fixed list.
Labels	Free-form multi-select tags. You can pre-fill suggested labels users can choose from.
Number	Numeric values. Budget, employee count, score.
Date	Date only. Decision timeline, renewal date, launch date.
Timestamp	Date and time. For events tied to a specific moment.
People	User picker. Champion, technical owner, executive sponsor.
URL	Web address with validation. LinkedIn, vendor profile, internal wiki link.

The other ten point at a record:

Type	Use for
Deal	One Deal. The renewal that follows a Won Deal, the Deal a Contact champions.
Deal (multiple)	Several Deals. Every Deal a partner Company sourced.
Lead	One Lead. The Lead a Contact first came in through.
Lead (multiple)	Several Leads. All the Leads a campaign generated for a Company.
Contact	One Contact. Executive sponsor on a Company, decision maker on a Deal.
Contact (multiple)	Several Contacts. A buying committee, the stakeholders on a Deal.
Company	One Company. A Company's parent, a Product's vendor.
Company (multiple)	Several Companies. Subsidiaries, partners, competitors.
Product	One Product. The main Product a Company runs on.
Product (multiple)	Several Products. Everything a Company has licensed.

Reference types are available on all five entities, and a field may point at the entity's own type: a Company field named *Parent* of type **Company** gives you an account hierarchy with no extra setup. How these fields behave in pickers, columns, filters, exports and imports is covered under Record reference fields.

Adding a custom field

Go to **Settings → Custom Fields**, pick the entity tab, and click **+ Add Custom Field**.

Add custom field

For **Companies**.

Name *

6/255

Parent

Field type *

Short text
Up to 255 characters

Paragraph
Multi-line text

Timestamp
Date + time

Dropdown
Single-select options

Date
Date only

Number
Numeric value

Labels
Multi-select tags

Multi-select
Multi-select options

People
User picker

URL
Web address

Deal
Links to one deal

Deal (multiple)
Links to several deals

Lead
Links to one lead

Lead (multiple)
Links to several leads

Contact
Links to one contact

Contact (multiple)
Links to several contacts

Company
Links to one company

Company (multiple)
Links to several companies

Product

Product (multiple)

Fill in:

- **Name** — up to 255 characters. This is what users see on the entity's detail page, in filters, and in column headers.
- **Field type** — pick one of the twenty options above.
- **Description** — optional, up to 4,000 characters. Helps your teammates understand what the field is for.

Some field types need a little extra setup:

- **Dropdown** and **Multi-select** — add at least one option. Each option has a name up to 80 characters. Use **+ Add Option** for each value, and the X next to a row to remove it.
- **Labels** — you can optionally pre-fill **Suggested labels**. Users can still type any label they want; suggestions just appear in the autocomplete to keep teams aligned.
- **Deal, Lead, Contact, Company, Product** and their **(multiple)** variants — nothing to configure. The field offers a picker over that entity's records.

Click **Create** when you're done. The field appears immediately on every record of that entity, ready to be filled in.

> **Each entity can have up to 1,000 custom fields**. Once an entity reaches the limit, **+ Add Custom Field** is disabled until a field is deleted.

Custom fields per entity

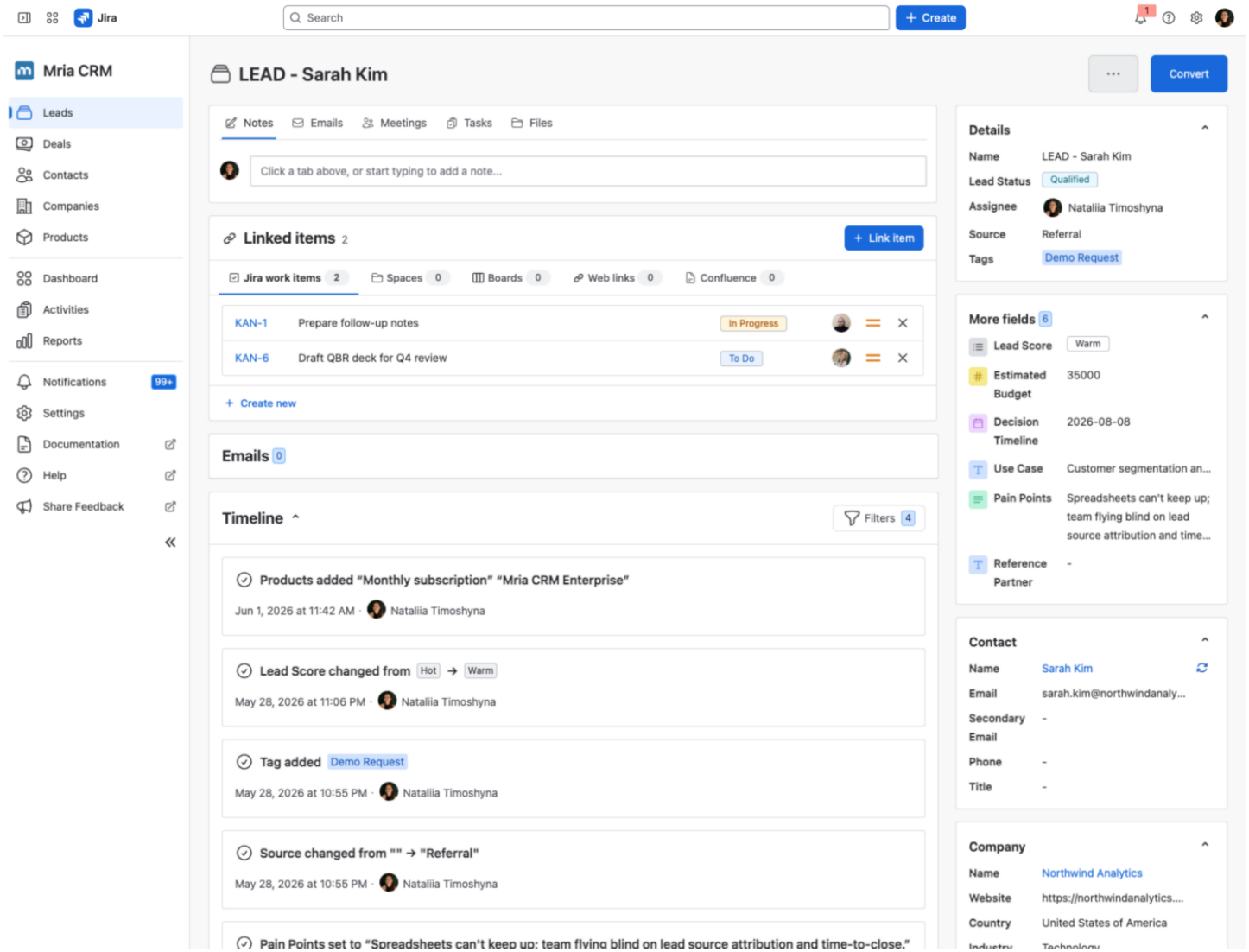
Each of the five core entities has its own set of custom fields — up to 1,000 each — configured on its own sub-tab. There is no shared field across entities — if you want the same field to exist on Leads *and* Deals (for example, a Lead Score), you create it on both sub-tabs.

That said, when a Lead converts to a Deal, matching fields *do* carry over automatically. See Lead to Deal Conversion for the full rules and the cross-entity flow below.

Leads

Lead custom fields show up on the Leads list (as optional columns), in the filter panel, on the Lead detail page's **More fields** section, and in CSV exports. They're also available when bulk-importing

Leads — see Leads Import.



Deals

Deal custom fields appear on the Deals list, in filters, on the Deal detail's More fields section, and in exports. They're also available when bulk-importing Deals — see Deals Import.

Contacts

Contact custom fields appear on the Contacts list, in filters, on the Contact detail's **More fields** section, and in exports. They're also available when bulk-importing Contacts — see Contacts Import.

Companies

Company custom fields appear on the Companies list, in filters, on the Company detail's **More fields** section, and in exports. They're also available when bulk-importing Companies — see Companies Import.

Products

Product custom fields appear on the Products list, in filters, on the Product detail page's **More fields** section, and in exports. They're also available when bulk-importing Products — see Products Import.

Lead → Deal conversion copy

When you convert a Lead to a Deal, Mria CRM automatically copies the value of any custom field that **exists on both Leads and Deals with the same name *and* the same type**.

For example, if you have a `Lead Score` Dropdown on Leads and a `Lead Score` Dropdown on Deals, the value carries over on conversion. If the names differ, or the types differ (one Dropdown, one Short text), the value will *not* copy — the system treats them as separate fields.

> Want a value to follow a Lead through to its Deal? Create the field on both entities with the exact same name and type. A good convention is to define the Lead version first, then copy its setup over to the Deal tab.

Where custom fields appear

Once created, custom fields are usable across the CRM:

- **List views** — click **Customize table** on the entity list to show or hide custom-field columns. The order of columns is saved per user.
- **Filters** — custom fields appear in the filter panel under their entity. Dropdown/Multi-select/Labels filter as picklists; Number and Date filter as ranges. Reference fields filter with a record picker — see below.
- **Detail pages** — the right-side **More fields** section lists every custom field for that entity. Click a value (or the "-" placeholder) to edit inline.

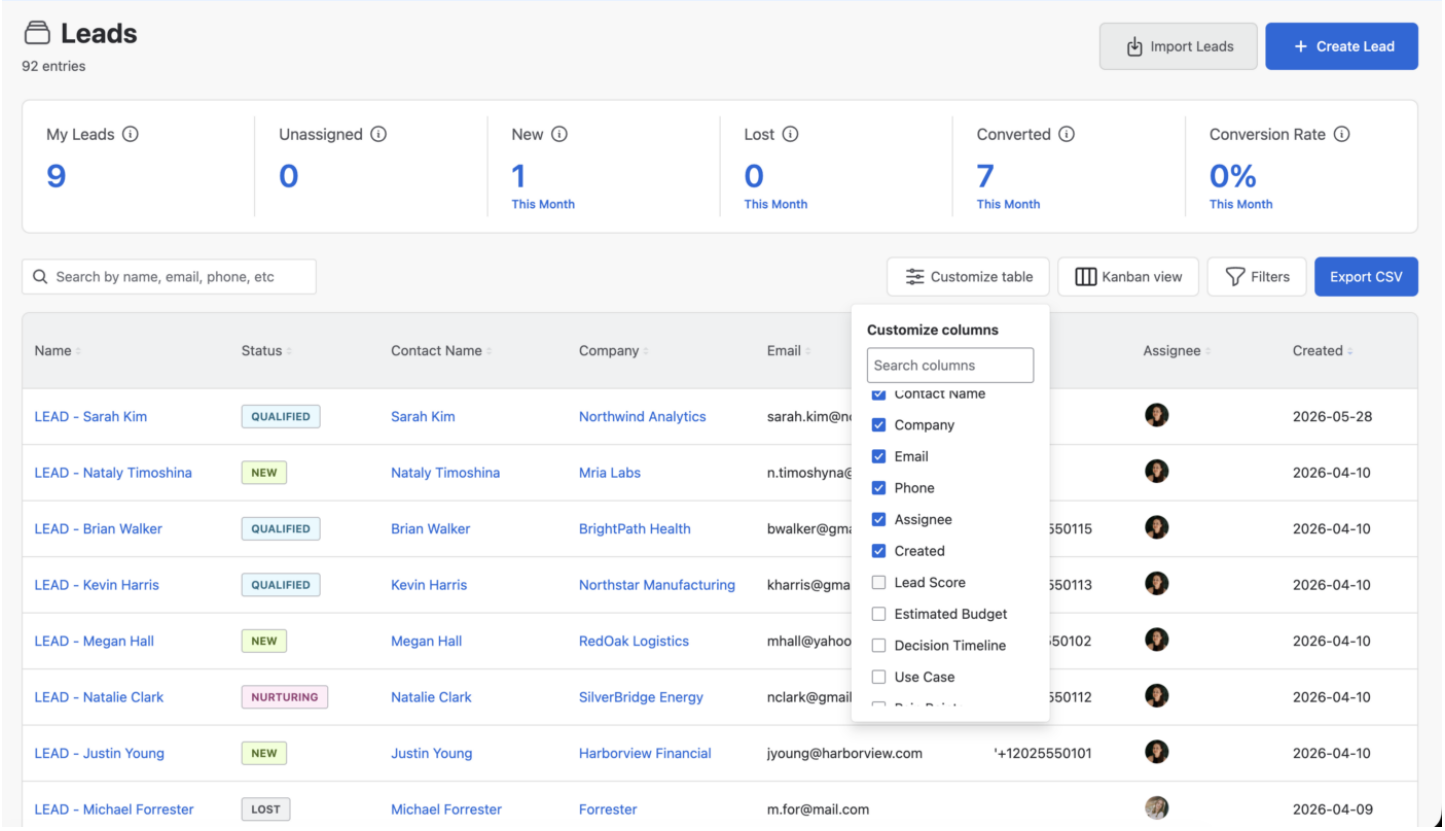
- **CSV exports** — custom fields are included automatically when you export the list. A reference field exports as two columns, the record's name and its ID.
- **Bulk imports** — Leads, Deals, Contacts, Companies and Products imports all support mapping CSV/XLSX columns to custom fields. See Leads Import, Deals Import, Contacts Import, Companies Import and Products Import.
- **Reports** — the seven reports are a fixed set, all of them deal-based; there is no report builder. Custom fields reach them as columns, through **Customize table** on the report itself.

Which custom fields a report offers

Deal custom fields appear in the deal reports — for example *Pipeline by Stage* and *Open Deals by Period* both list them under Customize table.

Deal Contacts by Product additionally offers Contact and Company custom fields, suffixed `(Contact)` and `(Company)` so you can tell them apart.

Lead custom fields do not appear in any report, because no report is Lead-based. To analyze on one, use the Leads list with **Customize table**, **Filters** and **Export CSV**. See Reports.

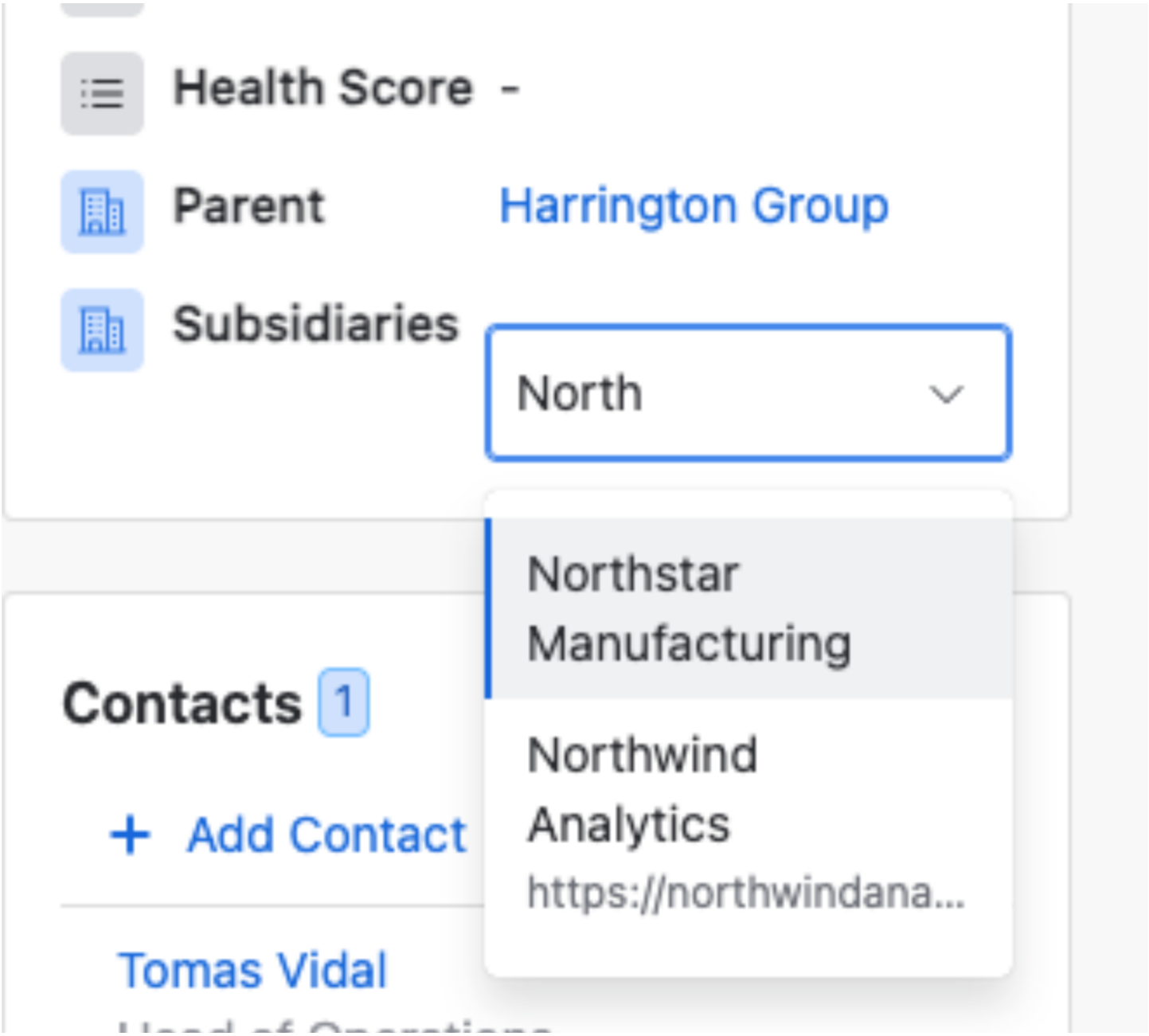


Record reference fields

A field of type **Deal**, **Lead**, **Contact**, **Company** or **Product** holds a link to another record rather than a value of its own; the **(multiple)** variants hold several. The record is stored by its ID, so renaming it updates every field that points at it — no re-typing, no migration.

Filling one in

- On the record, click the field in **More fields**. A picker opens over that entity's records: start typing a name and pick the match. Each result shows enough to tell lookalikes apart — a Company's website, a Contact's email.
- The record you are editing is never offered, so a Company cannot be its own *Parent*.
- On a **(multiple)** field each chosen record becomes a chip. Remove one with its `×`, add more from the same picker.



Where the link shows

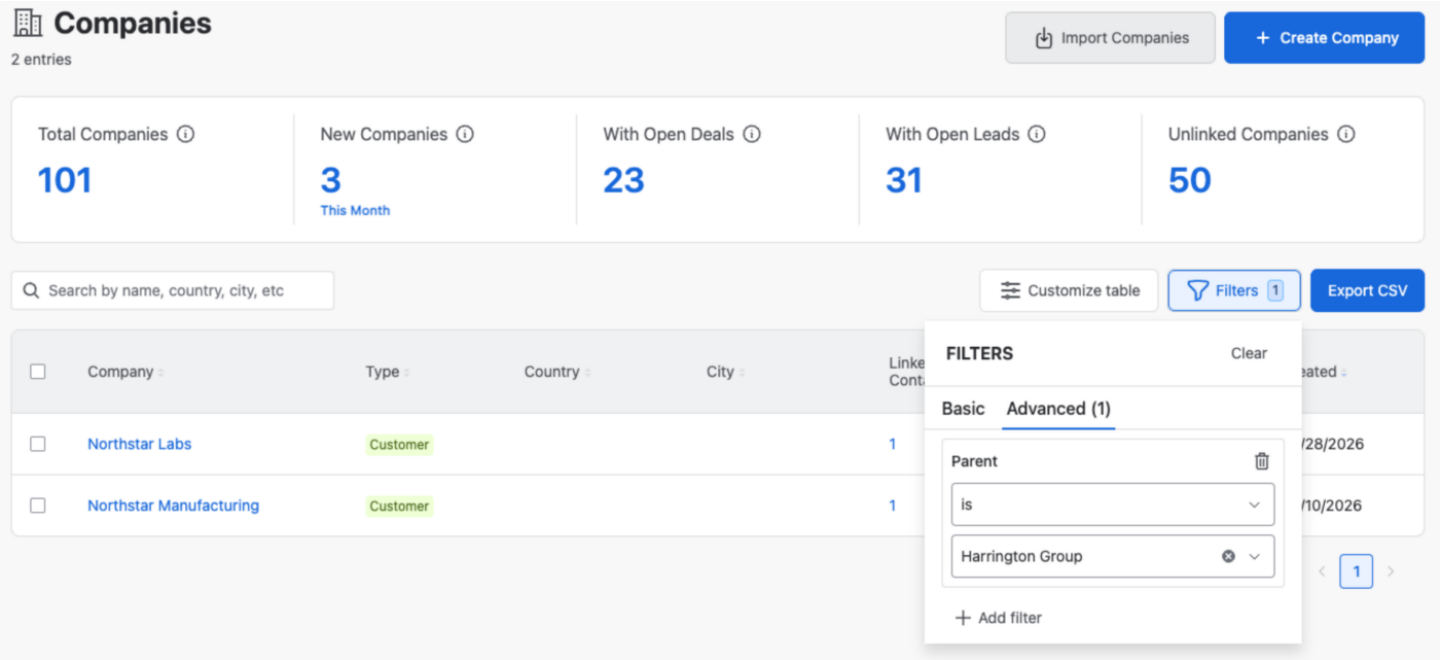
- **More fields** — the referenced record's name, as a link that opens it.
- **Table columns** — add the field through **Customize table**; the column shows the name, linked. A multiple field shows the first name followed by `+N`.
- **Filters → Advanced** — `is`, `is any of`, `is empty` and `is not empty`, with a record picker in place of a text box.
- **CSV export** — two columns per field: `<Name>` with the record's name and `<Name> ID` with its ID. Several records are comma-separated in both. The ID is what a re-import can rely on, because

names are not unique.

- **Import → Map Values** — a column of names is matched to records by name. A row whose name matches no record, or more than one, is reported, and the import waits until you pick the record for it. See Companies Import.

More fields 7

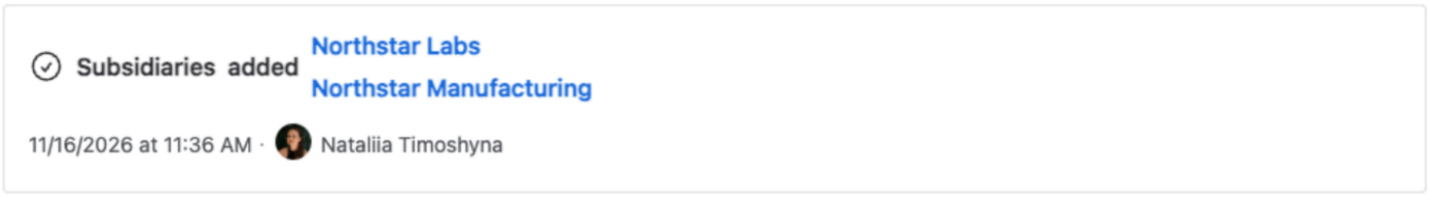
Annual Revenue	-
Founded Year	-
Renewal Date	-
Account Tier	-
Health Score	-
Parent	Harrington Group
Subsidiaries	—



When the referenced record changes

- **Renamed** — the new name appears everywhere the field is shown, immediately.
- **Deleted** — the field keeps the last name and shows it as `Acme Inc (deleted)`: grey, no longer a link. The value still sorts, filters and exports, so a report does not lose the row, and the referencing record's Timeline notes that the record was deleted. Replace or clear it like any other value.

Setting, changing or clearing a reference is recorded on the record's Timeline, with the names of the records involved:

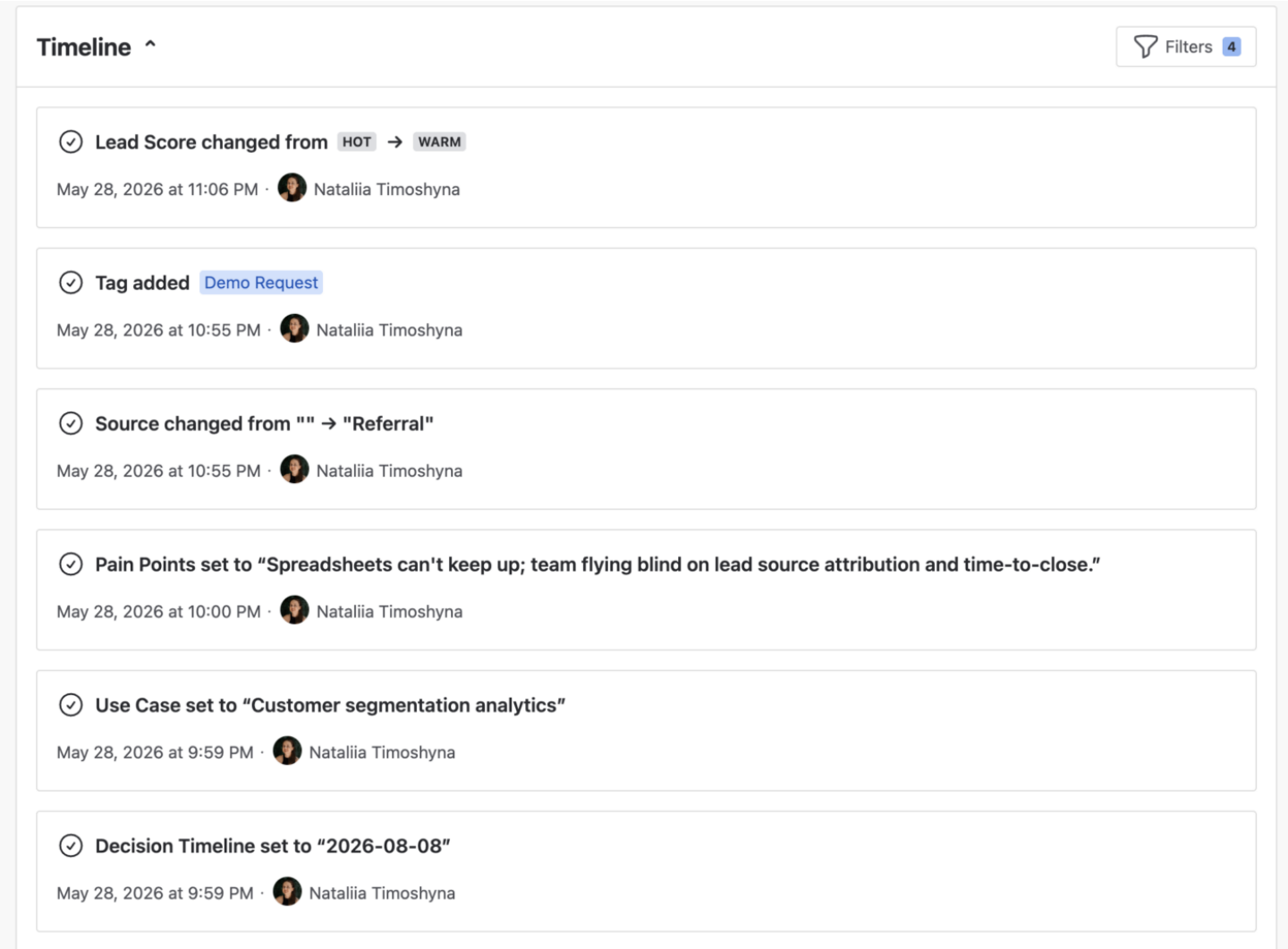


Permissions

Reference fields follow Roles & Permissions. A user whose role cannot view the referenced entity's records sees a placeholder instead of the record's name.

Change log

Mria CRM keeps a running history of every custom-field change made on **Leads and Deals** — who edited which field, when, and what the value was before and after. Open a Lead or Deal's **Timeline** tab to review the change log alongside other activity.



Editing, reordering, deleting

Back on **Settings → Custom Fields**:

- **Rename** a field by clicking its row and editing the **Name**. Existing data is preserved.
- **Reorder** fields with the drag handle on the left of each row. The order shown here is the order custom fields appear on detail pages and in exports.

- **Edit options** on a Dropdown or Multi-select — add, rename, or remove options. Removing an option clears it from any records currently using it.
- **Delete** a field with the **…** menu on the right of its row. Deletion is permanent and removes the value from every record — you'll be asked to confirm.

Deleting a custom field doesn't remove history of that field from the change log.

Tips

- Keep field names short. They show up as column headers and in filter dropdowns — long names get truncated.
- For values you'll filter or report on, prefer **Dropdown** over **Short text**. A controlled list keeps reports clean.
- To point at another record, use a reference type rather than a Short text copy of its name. The link opens the record and stays right when the record is renamed.
- If you want a value to follow Leads as they convert to Deals, create a matching field on the Deal tab with the same name and type.
- Use **Labels** when you want a flexible tag-style field (Bestseller, Strategic, Champion). Suggested labels keep usage consistent without locking the list down.
- Use **Description** on each field to explain what it's for — especially helpful for newer team members reading reports six months later.