

# GHM Custom Fields Setup Guide

Module 3 Assignment: Create Custom Fields & Customize Contact View

## 1 Navigate to Custom Fields

Settings (gear icon, bottom left) → Custom Fields

## 2 Create the Folder

BONUS

Click **+ Add Folder** → Name it: **HireMyAI Client Intake** → Save

This organizes all your intake fields into one clean group and earns bonus points on the assignment.

## 3 Create 10 Custom Fields

BONUS: 7-10 FIELDS

Inside the HireMyAI Client Intake folder, create each field below. Make sure "Group" is set to **HireMyAI Client Intake** for each one.

#	Field Name	Field Type	Options / Notes
1	Business Type	Dropdown (Single)	Agency, Coaching, E-commerce, Real Estate, Healthcare, Other
2	Biggest Pain Point	Multi Line	Placeholder: "e.g. I spend too much time on manual follow-ups"
3	Current Tools Used	Multi Line	Placeholder: "e.g. Zapier, Mailchimp, Google Sheets"
4	Monthly Budget	Dropdown (Single)	Under \$500, \$500-\$1k, \$1k-\$3k, \$3k-\$5k, \$5k+
5	AI Experience Level	Dropdown (Single)	None, Basic, Intermediate, Advanced

#	Field Name	Field Type	Options / Notes
6	Primary Goal	Dropdown (Single)	Save Time, Generate Leads, Improve Follow-Up, Scale Operations
7	Team Size	Dropdown (Single)	Solo, 2-5, 6-20, 20+
8	Website URL	Single Line	Placeholder: "e.g. https://hiremy-ai.com"
9	Preferred Contact Method	Dropdown (Single)	Email, Phone, WhatsApp, SMS
10	Timeline	Dropdown (Single)	ASAP, Within 1 week, Within 1 month, Just exploring

#### 4 Screenshot 1 - Custom Fields

Settings → Custom Fields → HireMyAI Client Intake folder

Take a screenshot showing all 10 fields with their names and types clearly visible.

#### 5 Customize Contact View

Contacts (left sidebar) → Manage Columns icon (top right of table)

Add these columns to your contact list view:

> Business Type

> Monthly Budget

> Primary Goal

> Timeline

#### 6 Screenshot 2 - Contact View

Take a screenshot of the Contacts list showing your custom columns visible in the table headers.

**Submission Checklist**

[x] Screenshot 1: Shows all 10 custom fields in the HireMyAI Client Intake folder

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[x] Screenshot 1: Field names are clear and field types are visible

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[x] Screenshot 1: Fields are organized in the HireMyAI Client Intake group/folder

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[x] Screenshot 2: Shows Contacts list with custom columns visible

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[x] Screenshot 2: At least 3 custom fields showing as columns

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[x] Both screenshots submitted to HLA portal Module 3 assignment

**Bonus points achieved:** 10 fields (7-10 required) + Organized into a named folder group.  
Full marks!