


Meeting Mojo How-to Guides



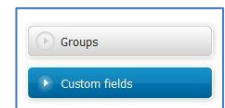
Search Categories: Custom Fields

Meeting Mojo's Custom Fields function allows you to create new categories that can be applied to either Organizations or Attendees. The new categories will be shown on your delegates' Account area, where they will be able to select from any list of criteria you specify, or add information to their profile in response to a question. You can also integrate any Custom Field into the Search engine, enabling your delegates to create company and individual profiles with search terms that give them a higher profile. If you have created a Registration form, all Custom Fields are automatically incorporated into it.

IMPORTANT: If you are going to assign your organizations to more than one Group, set up the Groups before you create any Custom Fields. This will simplify the process of configuring Groups, Meeting restrictions and Custom Fields. See our HowTo Guide, ['Creating and Organizing Groups'](#). 

1. Creating a Custom Field

- i. On the Groups tab, click the 'Custom fields' button at the right of the page.
- ii. Click 'new' to create the Field.
- iii. Type the name of the field in the box labelled 'Question'.
- iv. In the Description box, type a brief instruction such as 'Select one item from the list'. This will appear under the Custom Field in the user account profile edit pages.
- v. Now select the Field type from the dropdown.



Field type	Description
text field (60 character limit)	For questions with one-word/short answers, e.g., a phone number
text area (unlimited)	For questions with variable answers, e.g., a short biography
Checkbox	For opt-in questions, e.g., joining a mailing list
radio buttons	For survey-type questions with a limited set of answers, e.g. Yes/No
select (dropdown list)	For descriptive criteria where only one selection may be made, e.g., Business Type
multi-select (checkboxes)	For descriptive criteria where more than one selection may be made, e.g. keywords or product listings

- vi. If your chosen Field type is select or multi-select, add the criteria into the Options area as a list. **Separate each item with a comma – no spaces. IMPORTANT: items in your list must not contain commas. Use semicolons, brackets or the solidus / instead.**
- vii. Now click one of the radio buttons to link the Custom Field to Attendees or Organizations
- viii. Check 'Mandatory' to turn the category into a required field – this will ensure that your delegates use the category when adding or editing their profile, or registering on the system.
- ix. If you want the Custom Field to be part of the Search Engine, check 'Searchable'
- x. Finally, decide which Group(s) in the Groups list will use the Custom Field and check the name(s).
Note: if you have not added any Groups, check the default Group name.

TIP: Use fake organization/attendee entries to test whether the Custom Fields are working the way you want them to.

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2. Using Custom Fields

Custom Fields are there to enable users to select or add extra information for their profile, and to search for other users based on the information they have provided. Event managers can use Custom Fields to collect extra information about their attendees.

i. TEXT, TEXT AREA and SELECT field types only:

Preload custom field data via the import spreadsheet.

- Create the custom field on the Groups tab
- Place the name of the custom field in a new column on your import spreadsheet.
- Insert criteria into the column for each entry as required or as available.

	A	B	C	D	E	F	G
1	email	Title	firstname	lastname	organisati	password	Business Type
2	penny@m	Miss	Inêz	Pereira	Able Auto	password	Automotive
3	paul@me	Mr	Mark	Jones	Acme Con	password	Consultancy
4	otto@me	Dr	Joachim	Müller	Crazy Con	password	Construction

TIP: Be careful not to add too many different criteria, or spelling variation of the same item – both affect the quality of the search engine and can cause frustration to users.

IMPORTANT: When preloading into a MULTISELECT or RADIO BUTTON Custom Field, you must use only the criteria that have been pre-set in the Options section of the field. The system will ignore anything else you try to import.

ii. Apply different categories to different groups to improve the relevance of your search engine.

If you have Groups that differ widely in their 1:1 meeting objectives, you can set up Custom Fields that apply only to one Group or another. For example, one Group might contain large, medium and small companies. You could create a SELECT Custom Field called Company Size with Large, Medium and Small, or a range of employee numbers, and check only that Group in the Groups list (see 1.x., above). Delegates who want to do business with this Group will be able to use this category on the Search Engine to target companies of a certain size.

iii. Use custom fields in a registration form.

You can collect relevant information from delegates by including Custom Fields in a registration form. These fields can be made mandatory to ensure that all delegates add the information you require. They do not need to be connected to the Search Engine – this allows you to collect data that is not relevant to 1:1 meetings, such as an opt-in to your newsletter mailing list.

See our HowTo Guide, [‘Set up a Registration Form’](#). 