

Client Training HQ

Creating Custom Fields

Immigration Case Management (ICM) provides flexibility to create custom fields to provide additional data fields to be used and reported on as necessary.

If you have ICM Administrative privileges, you can create custom fields and apply them across your organization's system for use.

To set custom fields:

1. Click your **username** in the top right of the screen.
2. Select **Administrative Settings** from the drop-down menu.
3. Click **Custom Fields**.
4. Enter the desired custom labels for FN, Process, HR, or Address Book.
5. Click **Update Info**.

Once these custom fields are added, they will appear in different areas dependent on their categorization:

- FN fields - under the **Financial Misc** tab in the FN profile.
- Process fields - under the **Processes Forms** tab, in the **Assignment** folder in the FN profile.
- Address Book data - in the Address Book Contact record.
- HR fields - in the **Misc** tab in the HR contact record

More Training Available!

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