

Configure custom person fields

Switch on sections such as Residenza, prepare a new field with type, section and visibility and understand what becomes required, also for Excel imports.

4 min · Available · 2026-09-27

Before you begin

- ✓ You need Manage records access in the active workspace.
- ✓ Define purpose, owners and retention before collecting a new data item.

1 STEP 1 OF 5 · 1-2 MIN

Open configuration

From People → Records, select Manage fields. In pastoral-unit mode, the schema follows the active scope: the unit in Merged mode or one community in Bulk Operations.

Grey sections are system-defined. You may add fields to them but cannot rename or delete them.

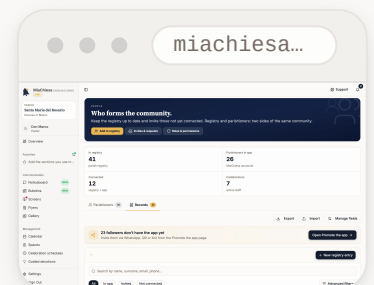


Fig. 1 Open configuration from the workspace where the person records are used.

2 STEP 2 OF 5 • 1-2 MIN

Review sections and visibility

The page separates standard sections, community groups and ungrouped fields. Each field shows type, required state and app visibility.

Visible to followers grants reading; Editable by followers is a separate choice. Leave both off for a staff-only field.

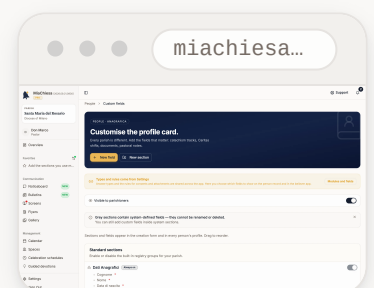


Fig. 2 Review the current structure before adding another field.

3

STEP 3 OF 5 · 1 MIN

Switch on Residenza and the other standard sections

In the **Standard sections** card ("Enable or disable the built-in registry groups for your parish") each section has a switch. **Dati Anagrafici**, **Contatti** and **Luogo di nascita** are **Always on**; you can switch **Stato civile**, **Residenza** (region, province, town, address, street number, postcode), **Salute**, **Documento di identità** and **Note** on or off. After a change "Configuration updated" appears.

A switched-off section disappears from the person's record and from imports: with **Residenza** off, the address columns of an Excel file stay on Do not import this column. Switch it on before importing a register with addresses.

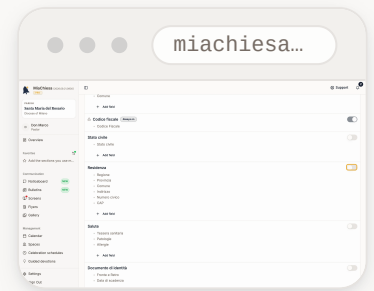


Fig. 3 The Residenza switch: when off, addresses are neither saved nor imported.

4

STEP 4 OF 5 · 1-2 MIN

Prepare the new field

Select New field, give it a clear name and choose short or long text, number, date, yes/no or list. Use Short text for phone numbers so spaces and the +39 prefix remain valid.

The capture fills Visit availability but does not press Save. The field is prepared and has not been applied to any record.

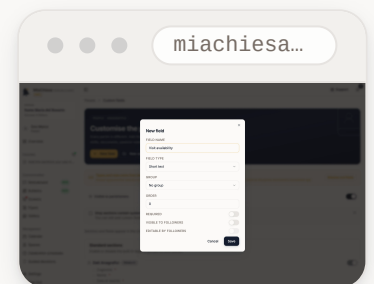


Fig. 4 The new field is filled in but unsaved in the capture.

Assess before saving

Choose group, order, **Required** and visibility. A required field is requested in the forms that use the schema and also in Excel imports: the file needs a column for every required field and rows with that field empty are skipped. Avoid required fields you don't really need.

Required standard fields, such as **Telefono** when it has the red asterisk, cannot be changed from this page: for a file without the children's phone, put a parent's number in that column.

Deleting a field later also deletes the values saved for every person. Before deleting, check whether the data must be exported or kept elsewhere.

What you have achieved

- ✓ You prepared a field whose type and visibility match its purpose.
- ✓ No field was saved in the demonstration capture.

Troubleshooting

I cannot open Custom fields



You need Manage records in the same workspace as the configuration.

I need to store a phone number



Use Short text rather than Number to preserve prefixes, spaces and leading zeroes.

I want to import addresses but they are not among the fields



Switch on the Residenza section in Standard sections: while it is off, address, town and postcode are not among the fields to match.