

How to Sync Custom Fields in Freshdesk

Last Modified on 01/15/2026 5:37 pm EST

This article shows how to synchronize custom fields in Freshdesk.

Exalate supports all eight types of custom fields from Freshdesk. When creating a new custom field in Freshdesk, you can define both the Label for Agents and the Label for Customers. However, when writing scripts or using custom fields in Exalate, it is important to use the generated name derived from the **Label for Agents**. The naming convention follows a specific set of rules.

Freshdesk Custom Field Naming Rules

When a custom field is created in Freshdesk, the name used in Exalate must follow these rules:

- 1. Prefix:** All custom field names must begin with `cf_`.
- 2. Lowercase Conversion:** The label is automatically converted to lowercase.
- 3. Spaces Replaced by Underscores:** Any spaces in the label are replaced with underscores (`_`).
- 4. Special Characters Removed:** Special characters (such as `@`, `#`, `$`, `%`, `&`, `*`, etc.) are stripped out.
- 5. Restricted Keywords:** Certain system-reserved words may not be allowed as part of the custom field name.

Naming Examples

Here are some examples of how Freshdesk field labels translate into generated names:

| Label (Agent) | Generated Name |
|--------------------------------------|-------------------------------------|
| "Label Agent" | cf_label_agent |
| "Customer ID" | cf_customer_id |
| "Order #" | cf_order |
| "User Email@" | cf_user_email |
| "This is a very#very@long Text name" | cf_this_is_a_veryverylong_text_name |

How to Define Custom Fields in Freshdesk

To create or edit custom fields in Freshdesk, refer to the Freshdesk documentation for the full process and guidance. Here's the relevant section from Freshdesk: [Understand and Customize Ticket Fields](#)

There are always two main configuration points: **Outgoing sync**, which is the sending side, and **Incoming sync**, which is the receiving side.

Outgoing Sync

These are examples of how to send the value of the Freshdesk custom field to the destination custom field.

```
replica.customFields."Single-Line Text" = entity.customFields."cf_singleline_text"  
replica.customFields."Multi-line Text" = entity.customFields."cf_multiline_text"  
replica.customFields."Checkbox" = entity.customFields."cf_checkbox"  
replica.customFields."Dropdown" = entity.customFields."cf_dropdown"  
replica.customFields."Date" = entity.customFields."cf_date"  
replica.customFields."Number" = entity.customFields."cf_number"  
replica.customFields."Decimal" = entity.customFields."cf_decimal"
```

Incoming Sync

These are examples of how to assign the value of the received custom field to the Freshdesk custom field.

```
entity.customFields."cf_number"? .value = replica.customFields."Number"? .value  
entity.customFields."cf_singleline_text"? .value = replica.customFields."Single-Line Text"? .value  
entity.customFields."cf_multiline_textg"? .value = replica.customFields."Multi-line Text"? .value  
entity.customFields."cf_date"? .value = replica.customFields."Date"? .value  
entity.customFields."cf_dropdown"? .value = replica.customFields."Dropdown"? .value? .value  
entity.customFields."cf_decimal"? .value = replica.customFields."Decimal"? .value? .value
```

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