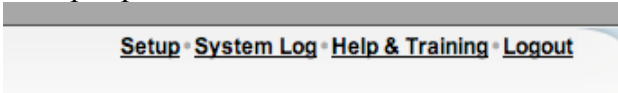## Case Study – Adding a Contact Detail Field

Purpose: Provide a very basic example for adding a contact detail field.
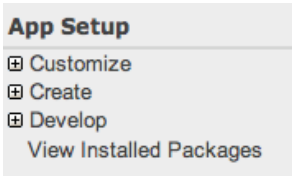
Overview: A nonprofit does not have 'members' and therefore does not use membership status details to sort Contacts for potential campaigns. To prepare a straightforward tabular report to be exported to Excel for mail merge purposes, this nonprofit wants to add a single additional checkbox to identify donors. This box can be simply left empty for non-donors and checked for donors. In the future if additional stratification of donors is needed, this field could be deactivated and a donor pick list could be added as an alternative field.

1. **Note- This example is not being recommended for your database. You can follow the steps below to add this field and either not save it or delete it afterwards.**
2. These steps would **only** be performed once by one of the organization's Salesforce administrators.
3. In general, you want to be highly selective in adding fields - think carefully through the steps involved in their use and maintenance.
4. In the upper right hand corner, above the Salesforce tabs, click on the underlined 'Setup' option.
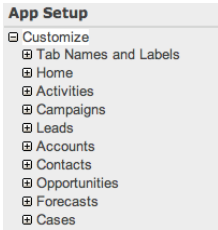

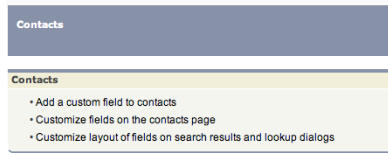5. On 'Your Personal Setup' screen, click on 'Customize' on the left-hand side of the page beneath ' App Setup'.

6. On the next screen, choose 'Contacts' from pick list offered below 'App Setup' and then click on the 'Customize My Pages' button.


7. On the 'Contacts' screen choose 'Add a custom field to contacts'.

Contacts

Contacts
- Add a custom field to contacts
- Customize fields on the contacts page
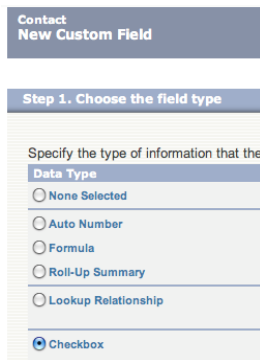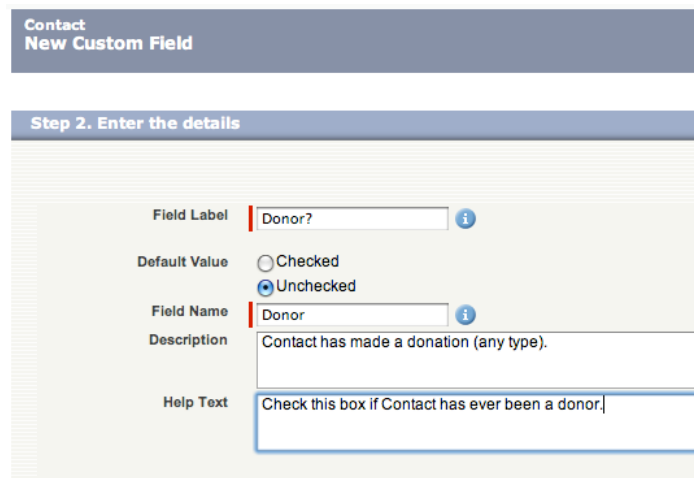- Customize layout of fields on search results and lookup dialogs

8. On the 'Contact Fields' screen, scroll down to the section below 'Contact Standard Fields', known as 'Contact Custom Fields and Relationships' and click on the 'New' button.

Contact Custom Fields & Relationships		New	Field Dependencies
Action	**Field Label**	**Data Type**	
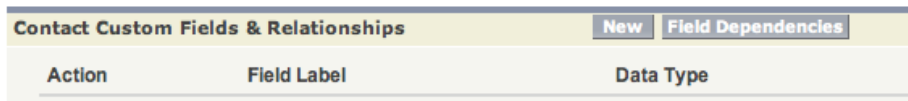
9. On the 'Contact New Custom Field' screen, 'Step 1. Choose the field type', change the selection from 'None Selected' to 'Checkbox' as shown below. A Checkbox allows users to select a True (checked) or False (unchecked) value. Then click on either 'Next' button to continue.

**Contact
New Custom Field**

Step 1. Choose the field type

Specify the type of information that the

Data Type
- ○ None Selected
- ○ Auto Number
- ○ Formula
- ○ Roll-Up Summary
- ○ Lookup Relationship
- ◉ Checkbox

10. 'Contact New Custom Field' screen 'Step 2. Enter the Details' has been completed for this example. Note – the field name includes a '?' so that it will be easy to see that this field is a checkbox when you create future reports including this field. Then click on either 'Next' button to continue.

**Contact
New Custom Field**

Step 2. Enter the details

Field Label	Donor?
Default Value	○ Checked ◉ Unchecked
Field Name	Donor
Description	Contact has made a donation (any type).
Help Text	Check this box if Contact has ever been a donor.

11. 'Contact New Custom Field' screen 'Step 3. Establish field-level security'. These selections have been left in the default mode that is 'Visible' to every level of Salesforce user in your organization. Remember, this checkbox will only indicate that a particular Contact has ever made any donation and won't include any donation details.

Then click on either 'Next' button to continue.

12. On the final screen 'Contact New Custom Field Step 4. Add to page layouts' keep the default setting to add to all your organizations page layouts (your page layout listing may be different from this example shown). Then click on either 'Save' button to save without creating any additional custom fields.

Note: as described on the screen for step 4, once this New Custom Field has been saved, this field will now be added as the last field in the second column of the Contact and other checked pages. If you wish to change the location of the field in the future, you will also need to customize the related page layouts. These changes have become relatively easy in the new nonprofit template.