



NPSP Workflow Diagrams



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Overview

Nonprofit Success Pack (NPSP) uses Apex programming to implement many of its features. Apex lets you take full advantage of all that NPSP has to offer without having to perform repetitive tasks. With Apex, there's a lot going on under the hood, and understanding exactly what drives Apex workflows can be difficult. Apex is like that computer in your car. Based on your driving, it knows when to adjust the air/fuel mixture in the engine or shift gears for you.

This reference guide provides workflow diagrams and text descriptions for several automated NPSP processes.

This guide is for database administrators, implementation partners, and third-party software developers, interested in the technical aspects of these processes. If you're looking for more general information on how NPSP works, see the [NPSP Documentation](#).



Note

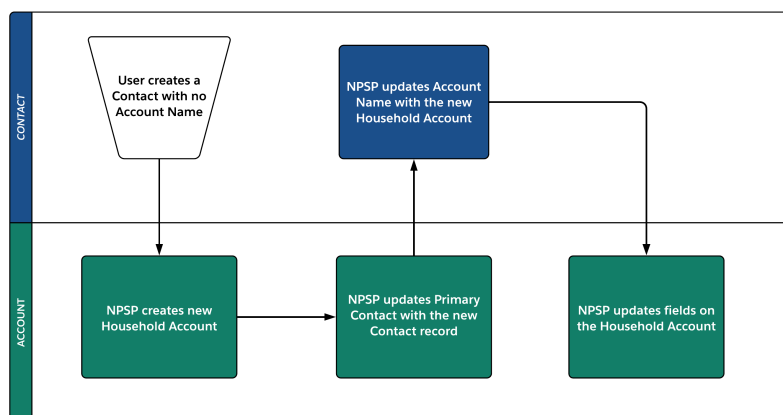
This guide doesn't cover every workflow in NPSP. In fact, it only covers a handful. Let us know what we should include next. If you're interested in contributing toward this document, please reach out in the [Nonprofit Success Pack group](#)!

NPSP Workflows

Automatically Create a Household Account for a New Contact

In the Household Account model, NPSP automatically creates a Household Account for each new Contact. When you create a Contact, leave the Account Name field blank and NPSP does the rest.

Here's the workflow diagram for this process:



1. A user creates a new Contact, leaving the Account Name field blank.
2. NPSP creates a new Household Account.
3. NPSP populates the new Contact in the Primary Contact field on the Household Account.
4. NPSP populates the Contact's Account Name field with the new Household Account.

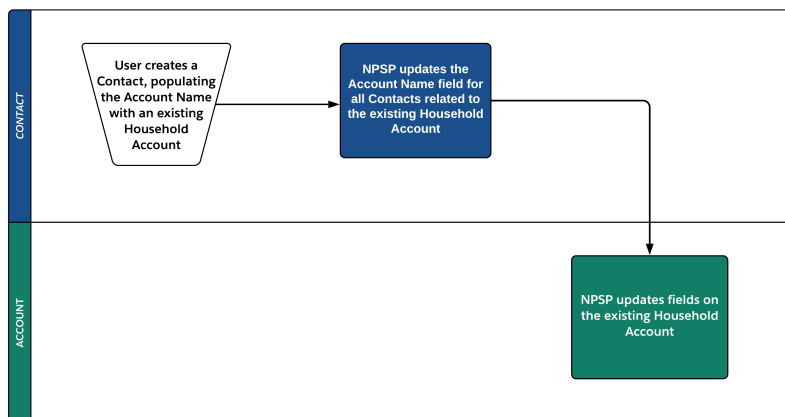
5. NPSP populates these Household Account fields:
 - a. Household Name
 - b. Formal Greeting
 - c. Informal Greeting
 - d. Number of Household Members
 - e. _SYSTEM: Account Type = Household Account
 - f. _SYSTEM: Is Individual = True

For more information, read [Add or Remove a Contact](#).

Link a New Contact to an Existing Household Account

Let's say you need to enter new donor information and you have the names of each partner in a household. When you create the first Contact record, NPSP automatically generates the Household Account. When you create the second Contact, you can enter the Household Account in the Account Name. Here's a workflow diagram for this process:

Here's a workflow diagram for this process:



1. A user creates a Contact, populating the Account Name field with an existing Household Account.
2. NPSP updates the Account Name field for all Contacts related to the existing Household Account.

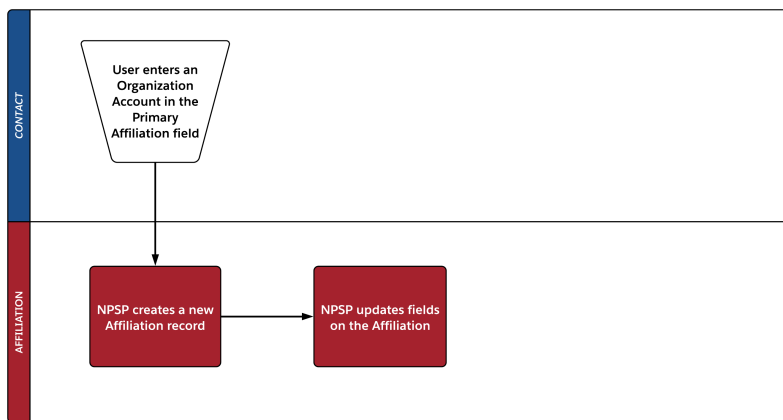
3. NPSP updates these Household Account fields:
 - a. Account Name
 - b. Formal Greeting
 - c. Informal Greeting
 - d. Number of Household Members

For more information, read [Add or Remove a Contact](#).

Set a new Primary Affiliation on a Contact

Affiliations link Contacts with Organization Accounts. Affiliations are great because they allow you to track a Contact's current and former Affiliations, so you can see your constituents' involvement in multiple organizations over time (as they move on to new jobs or join boards at different organizations, for example). When you enter a Primary Affiliation on a Contact, NPSP generates an Affiliation record automatically.

Here's a workflow diagram for this process:



1. A user enters an Organization Account in the Primary Affiliation field on a Contact.
2. NPSP creates a new Affiliation record.

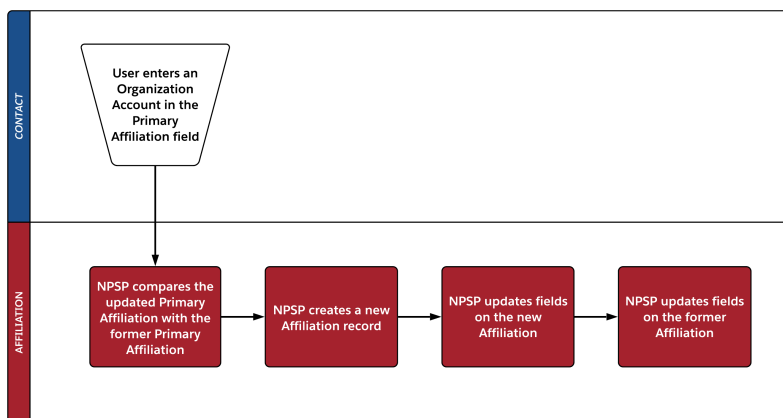
3. NPSP updates these Affiliation fields:
 - a. Primary = True
 - b. Status = Current
 - c. Start Date = Today
 - d. Role = The related Contact's Title
 - e. Organization = The same Organization Account in the related Contact's Primary Affiliation field

For more information, read [Create an Affiliation with an Organization](#).

Update the Primary Affiliation on a Contact with Existing Affiliations

Affiliations can tell you a lot about a Contact and their network. Say you know where your Contact works, but you've recently found out they're a board member at an influential non-profit. Knowing their employer is good, but their status as a board member is more relevant. To change the Primary Affiliation on a Contact, update the Primary Affiliation field, and NPSP takes care of the rest.

Here's a workflow diagram for this process:



1. A user enters an Organization Account in the Primary Affiliation field of a Contact.
2. NPSP compares the updated Primary Affiliation with the former Primary Affiliation.
3. NPSP creates a new Affiliation record.

4. NPSP updates the new Affiliation:
 - a. Primary = True
 - b. Status = Current
 - c. Start Date = Today
 - d. Role = Contact's Title
 - e. Organization = The same Organization Account in the related Contact's Primary Affiliation field
5. NPSP updates the former Affiliation:
 - a. Primary = False
 - b. Status = Former
 - c. End Date = Today

**Note**

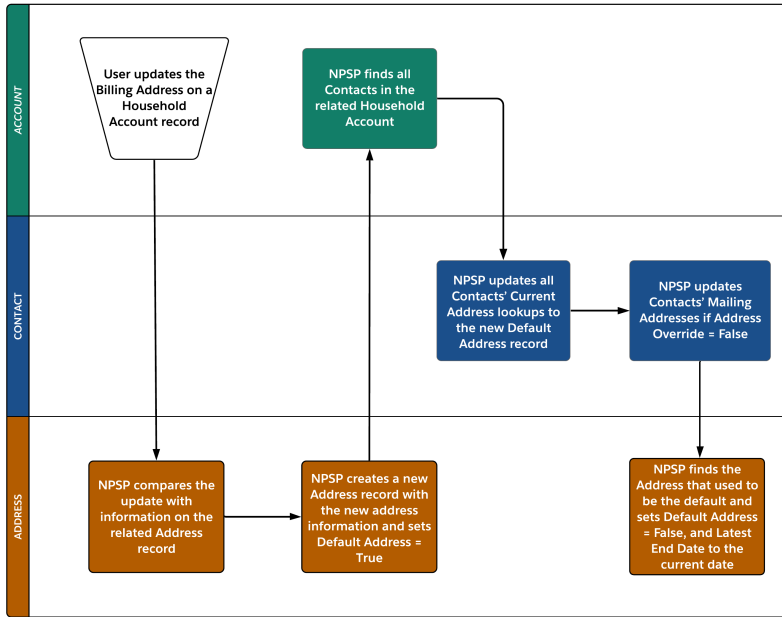
A Contact can have only one Primary Affiliation at a time.

For more information, read [Create an Affiliation with an Organization](#).

Update a Household Account's Billing Address

NPSP lets you track multiple addresses for each Household. For example, seasonal addresses, work addresses, home address, or other addresses you'd like to keep track of for mailings. For each address, you can specify the type of address it is, and whether or not the address is the default mailing address for the Household. When you update the Billing Address for a Household Account, NPSP updates the address information for all the Contacts in the Household.

Here's a workflow diagram for this process:



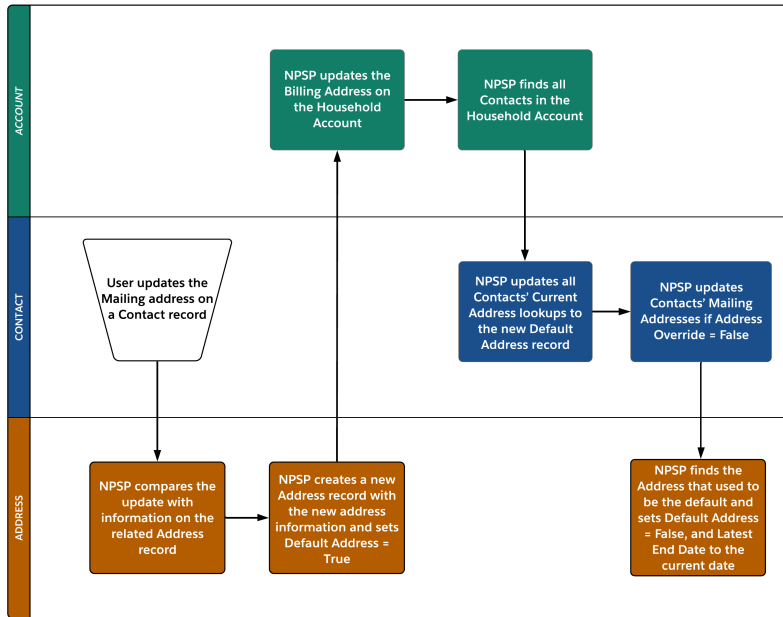
1. A user updates the Billing Address on a Household Account record.
2. NPSP compares the updated information with the existing Address record.
3. NPSP creates a new Address record with the new address information and sets Default Address = True.
4. NPSP finds all Contacts in the related Household Account.
5. NPSP updates Current Address on all the Contacts to the new Default Address record.
6. NPSP updates Contacts' Mailing Addresses if Address Override = False.
7. NPSP finds the Address record that used to be the default and sets Default Address = False, and Latest End Date to the current date.

For more information, read [Address Management Overview](#).

Update a Contact's Mailing Address

When you update a Contact's Mailing Address, NPSP automatically updates the address information for the Household Account and all other Contacts in the Household.

Here's a workflow diagram for this process:



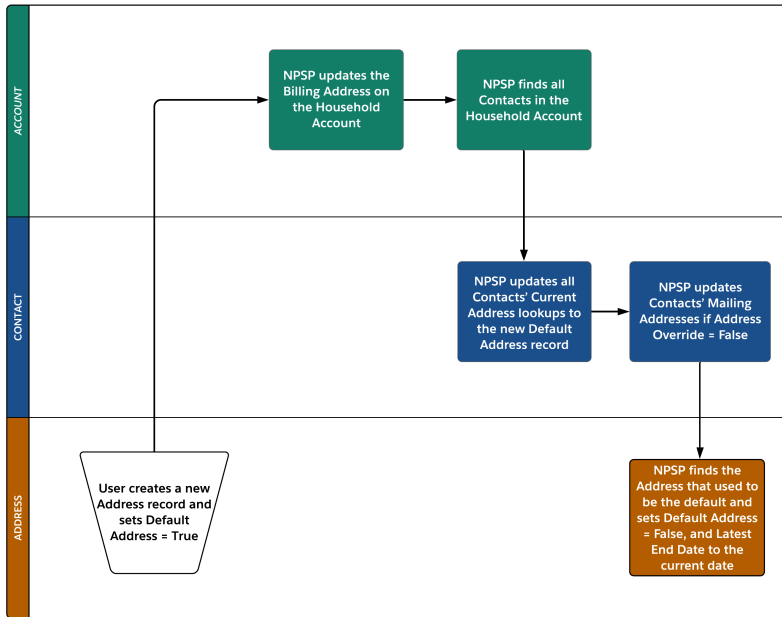
1. A user updates the Mailing Address on a Contact record.
2. NPSP compares the updated information with the existing Address record.
3. NPSP creates a new Address record with Default Address = True.
4. NPSP updates the Billing Address on the Household Account.
5. NPSP finds all Contacts in the related Household Account.
6. NPSP updates all Contacts' Current Address lookups to the new Default Address record.
7. NPSP updates Contacts' Mailing Addresses if Address Override = False.
8. NPSP find the Address that used to be the default and sets Default Address = False, and Latest End Date to the current date.

For more information, read [Address Management Overview](#).

Create Default Address Record Manually

Perhaps you want to load address data with the Data Loader or you want to add an Address record directly to an Account or Contact. NPSP automatically updates the address information for the Household Account and all other Contacts in the Household.

Here's a workflow diagram for this process:



1. A user creates a new Address record and sets Default Address = True.
2. NPSP updates the Billing Address on the Household Account.
3. NPSP finds all Contacts in the related Household Account.
4. NPSP updates all Contacts' Current Address lookups to the new Default Address record.
5. NPSP updates Contacts' Mailing Addresses if Address Override = False.
6. NPSP find the Address that used to be the default and sets Default Address = False, and Latest End Date to the current date.

For more information, read [Address Management Overview](#).