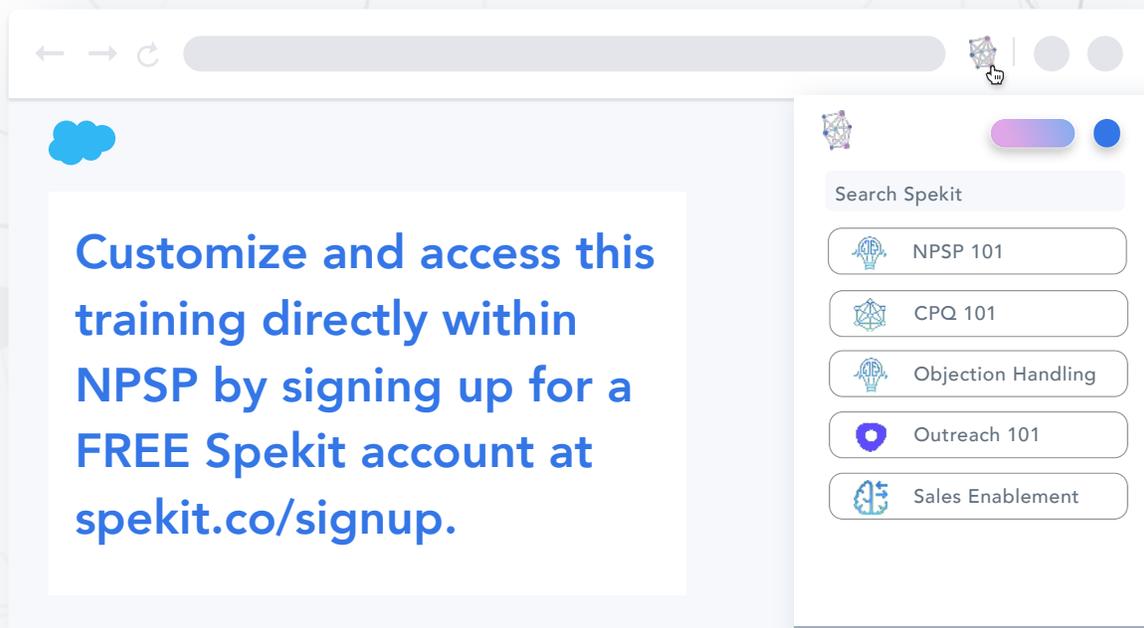


# NPSP 101

The complete guide to getting started with the Nonprofit Success Pack from Salesforce.

Content provided by



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# 02. What is NPSP?

## (1) What is NPSP and what is it used for?

The Nonprofit Success Pack helps nonprofit organizations get started using Salesforce by providing pre-built configurations that a nonprofit is likely to need. NPSP includes:

- **New custom objects** like Relationships, Affiliations, and Payments.
- **New custom fields on standard objects** like giving history at the Account and Contact level, and donation information on the Opportunity level.
- **New triggers (automation)** which run based on the creation or editing of certain records, like creating a Household-type Account for new Contacts.
- **Utilities** to help users keep data clean, like mass-updating Opportunity Names to keep them consistent and enabling bulk entry of several donations at one time.

## (2) Who created NPSP and how is it updated?

NPSP is an open-source project maintained by a combination of Salesforce professionals and a volunteer community. NPSP has gone through multiple versions since its creation in 2008 as a community-led project. A full-time team at Salesforce helps strengthen and stabilize core features, and a volunteer community gathers a few times a year to work on new desired features which gradually make their way into the core package. [Click here to learn more about how you can contribute](#) to strengthening NPSP.

## (3) FAQs

- [Why is NPSP awesome?](#)
- [How do I use NPSP in a sentence so I sound like I know what I'm talking about?](#)
- [What is the difference between NPSP and the Nonprofit Cloud?](#)
- [What is the difference between NPSP and the Power of Us program?](#)

## 02.1. Why is NPSP awesome?

### Why is NPSP awesome?

Without NPSP, all nonprofits who want to use Salesforce would have to do an extraordinary amount of work to configure Salesforce (which is built as a business-to-business corporate sales database) to understand the unique nature of nonprofit fundraising and program engagement. By installing NPSP with a couple clicks, nonprofits can reap the benefits of more than a decade of work contributed by thousands of people, giving their Salesforce configurations a jumpstart toward functioning and feeling more like the ways they do their work.

## 02.2. How do I use NPSP in a sentence so I sound like I know what I'm talking about?

### How do I use NPSP in a sentence so I sound like I know what I'm talking about?

- "We're using Salesforce with NPSP installed. It's really helpful for automatically setting up Households for our Contacts."
- "Email marketing isn't a part of NPSP right now. We'd have to find a different application to use."

## 02.3. What is the difference between NPSP and the Nonprofit Cloud?

What is the difference between NPSP and the Nonprofit Cloud?

- NPSP is a software package that can be installed into Salesforce. Nonprofit Cloud is a suite of products from Salesforce targeted for nonprofits, including NPSP.
- NPSP is free, but all other products in the Nonprofit Cloud are paid.
- To learn more about Nonprofit Cloud, .

## 02.4. What is the difference between NPSP and the Power of Us program?

What is the difference between NPSP and the Power of Us program?

- The Power of Us program offers 10 free Salesforce licenses to qualifying nonprofits.
- Those nonprofits can optionally choose to use NPSP installed in their Salesforce (most do).

# 03. What is an Account?

## (1) What is an Account and what is it used for?

If you are using NPSP 3.0 and later, it is likely you are using the Household Account model ([recommended by NPSP](#)). In this model, an Account represents an individual Household or organization with whom your nonprofit has a relationship.

**Household Accounts:** Households are used to track and engage with donors, members, volunteers and other constituents that share a home with the same address.

- Imagine having a Contact named Harry Potter. If his partner Ginny Weasley was also in your Salesforce as a Contact, they would both belong to the Harry Potter & Ginny Weasley Household Account. This would enable you to track any donations or membership dues that came in from their Household and to send a thank you letter with a warm greeting to both of them.
- If Ginny Weasley was not in Salesforce, then your Harry Potter Contact would be placed in his own Harry Potter Household Account. You'll notice that the "Account" on Harry's Contact record is listed as his Household. Even though Harry doesn't share a Household with anyone else in this scenario, every Contact in your Salesforce needs a Household to keep your data consistent and reliable.

**Organization Accounts:** Organization Accounts are used to track institutions such as foundations, schools, corporate donors, vendors, government institutions, etc.

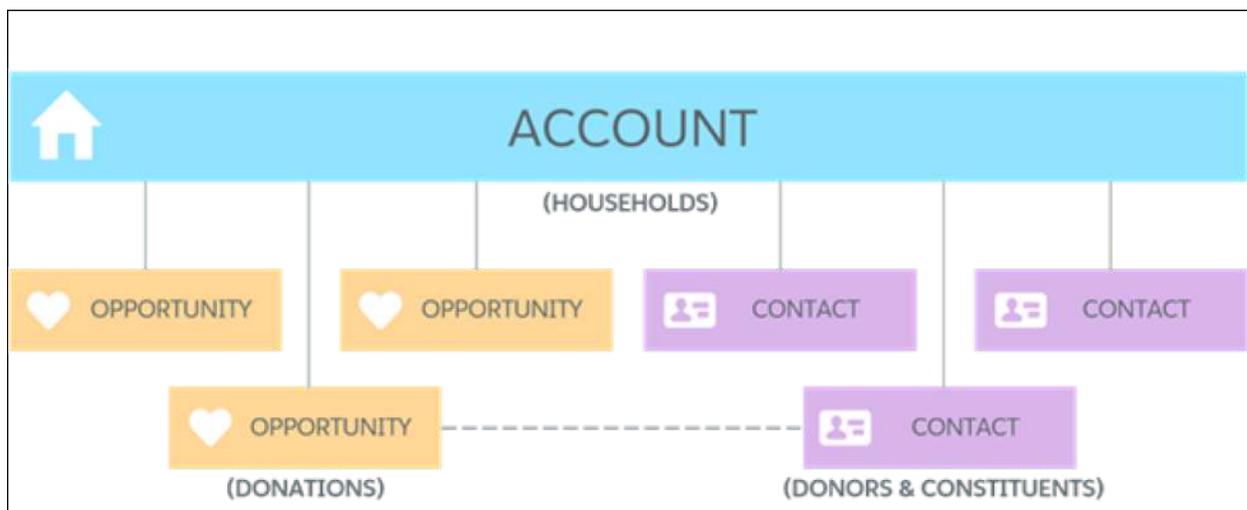
- Tracking these separate from Household allows you to separately report on Households (ex: giving via donations and membership dues) v. Organizations (ex: giving via grants and sponsorships).
- NPSP also makes it possible for you to track Contacts' [Affiliations](#) with Organization Accounts (ex: you can track a grant officer as a Contact in your Salesforce, the funding Organization (Account) they work for and information about their Affiliation

with that Account such as their start date. Harry Potter can have an Affiliation record with Hogwarts *and* a Household of the Harry Potter and Ginny Weasley Household.

With NPSP you can relate records like Opportunities and Cases to a Contact and an Account.

For example:

- Imagine you've received a donation from Ginny Weasley. On the donation Opportunity you create in Salesforce you can track Ginny as the Opportunity's "primary contact" since she sent you the check, but you always want to track Ginny and Harry's Household as the Opportunity's "Account" since she sent the check on behalf of both of them.
- Imagine you've received a grant payment from a funder organization. It's likely you will want to track both the grant officer (Contact) that sent it to you and the organization (Account) that it is from.



## (2) Why did NPSP create the Account Model this way?

Salesforce was initially designed as an application for companies to improve their sales process.

As a result, the original Salesforce data model was focused on Account-to-Account

# 04. What is a Household?

## (1) What is a household and what is it used for?

In your work, you may often think about and engage with your constituents in relation to other individuals with whom they share a home or family unit (ex: partners/spouses, parents, children, siblings, etc).

- NPSP enables you to group these Contacts within a household Account and customize settings for that family's household (their household address, mailing greeting, donations you've received from individuals on behalf of their household, etc.).
- If a Contact does not share a household with any other individuals in your org, they will live in their own household record (as the only "Household Member").

A Household is simply an Account with a record type of "Household", although the functionality you gain from using households - especially for your fundraising teams - is powerful!



Account

**Harry Potter and Ginny Weasley Household**



Primary Contact

[Harry Potter](#)

Total Gifts

\$200.00

Total Number of Gifts

1

## **(2) Why did NPSP create households this way?**

The Household Account Model was designed to make it easier for you to:

- Track and report on Contacts within a household
- Manage settings for each household (ex: current and former addresses, which names should be included in a mailing greeting, etc).
- Easily see aggregate information about records related to a household and its household members (ex: "total number of household members," "household lifetime giving" or "total soft credits")
- Send warm and streamlined communications to families (via personalized greetings)

## **(3) FAQs**

- [How is a household Account different from an organization Account?](#)
- [How do I add Contacts to a household or split a household?](#)
- [How do I make a Contact's address different from their households?](#)
- [If a Contact does not share a Household with anyone, why does it still need a Household?](#)

## **(4) Build your skills in this area!**

- Complete this Trailhead challenge on [households](#)