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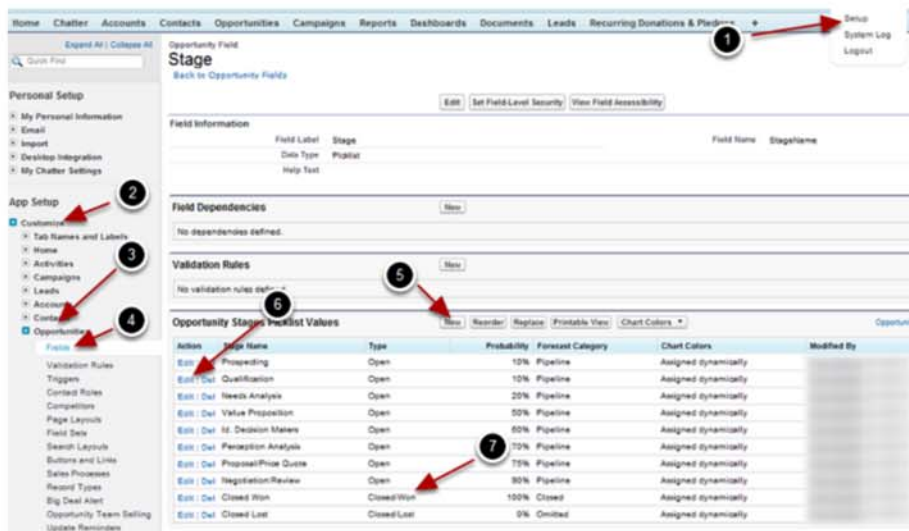
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NPSP: Installing the NPSP from the Appexchange

This article will show you how to install a managed version of the Nonprofit Starter Pack into a blank Enterprise Edition, or Developer Edition organization. When complete with the steps, you should have an org that is virtually identical to the pre-installed and configured Nonprofit Starter Pack available through the salesforcefoundation.org trial signup. (Note: If you're using a Developer Edition org, it is recommended that you remove the page, controller and tab included as part of the Developer Edition. The recommended deletion order is: Tab->Pages->Classes)

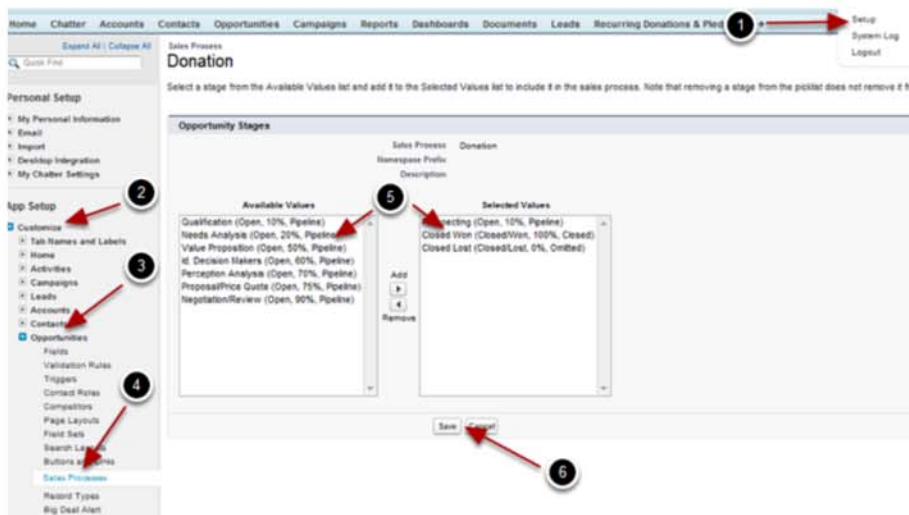
Setting Some Defaults in Your Org



First, you'll want to decide your stage name values for your Sales Process if you don't currently have one configured. You can use the default values provided, or create/modify your own.

A Sales Process is simply a collection or subset of the picklist values associated with the Stage Name field. You can edit those stage name values by going to Setup (1), Customize (2), Opportunities (3), Field (4), and clicking on the Stage field (not shown). You can then either create new values (5), or edit existing values (6). For an Opportunity to be counted, you'll need to make sure your 'closed' stage is also set as 'Closed/Won'. (7)

Sales Processes



You'll next need to create at least one Sales Process from your existing values.

Select Setup (1), Customize (2), Opportunities (3) and Sales Process (4). Then click 'New' (not shown) and provide a name for your Sales Process (not shown). You'll then need to select from the values available from the Stage

Name above. You can choose to use the default ones, or create your own as appropriate. Here, we've selected three of the existing values (5). Click Save when done (6).

Opportunity Recordtypes

The screenshot shows the 'New Record Type' setup page for 'Opportunity'. The page is titled 'Step 1. Enter the details'. It shows a form for creating a new record type. Red arrows and numbers 1 through 7 indicate the steps: 1. Click 'Setup' in the top right. 2. Click 'Customize' in the left sidebar. 3. Click 'Opportunities' in the left sidebar. 4. Click 'Record Types' in the left sidebar. 5. Select 'Donation' for 'Record Type Label', 'Record Type Name', and 'Sales Process'. 6. Click 'Next' at the bottom right. 7. Click 'Next' at the bottom right of the 'Record Types Currently Available' table.

Profile Name	Record Types Currently Available	Enable for Profile	Make Default
Contract Manager		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom Marketing Profile		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom Sales Profile		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom Support Profile		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - Free User		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gold Partner User		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Read Only		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Silver Partner User		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Solution Manager		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard Platform User		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard User		<input checked="" type="checkbox"/>	<input type="checkbox"/>
System Administrator		<input checked="" type="checkbox"/>	<input type="checkbox"/>

Next we'll want to create at least one Opportunity Record Type, though you may choose to create more. You may choose to create your record types using whatever names are most appropriate to your organization. The Nonprofit Starter Pack has four enabled at signup, Donation, Grant, Membership and Major Gift. You can use those, or select your own.

To create record types, go to Setup (1), Customize (2), Opportunities (3), Record Types (4) and click "New" (not shown). Then provide a name, label, and select the Sales Process (5) you wish to use for this record type. Finally, make sure the record type is enabled for the correct profiles (6), and click 'Next' (7). You'll then need to select a layout for this record type. You can select the default 'Opportunity Layout' for now, we'll discuss page layouts more shortly. (not shown).

Install the 5 Packages



Required Fields and Validation Rules

When packages are installed, code is run to make sure everything is working. If these 'tests' pass, the package can install correctly. If the tests fail, the package won't install.

Tests may fail for lots of reasons, but there are a couple common ones. If you have required fields on objects related to the package, the tests may not be able to create records, causing test failure. The same is true of validation rules--the test has no way of knowing what rules you have, and so can't create records.

If you get an install failure, you can try again after you've turned off your required fields and validation rules.

If you are upgrading an existing installation:

As of version 1.16, a 'Recurring Donations & Pledges' tab is included in the package. If you already have a tab with this name, you will have to delete it before upgrading this package.

To delete the tab:

1. Click on Setup | App Setup | Create | Tabs
2. Delete the tab named 'Recurring Donations & Pledges'>

You'll only have to delete that tab the first time you upgrade to 1.16 or higher.

It is recommended that you read the full [Installation Notes](#).

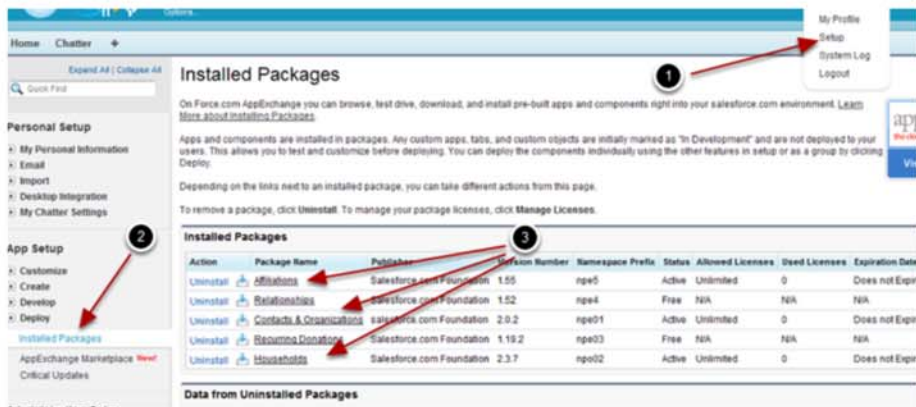
[Continue and install the package...](#)

You'll first need to install all five packages of the Nonprofit Starter Pack. The recommend install order is: Contacts & Organizations first, then any order of the remaining four packages: Recurring Donations, Affiliations, Relationships and Households.

You can find the packages by going to the Hub homepage (<https://powerofus.force.com/pubhome>)

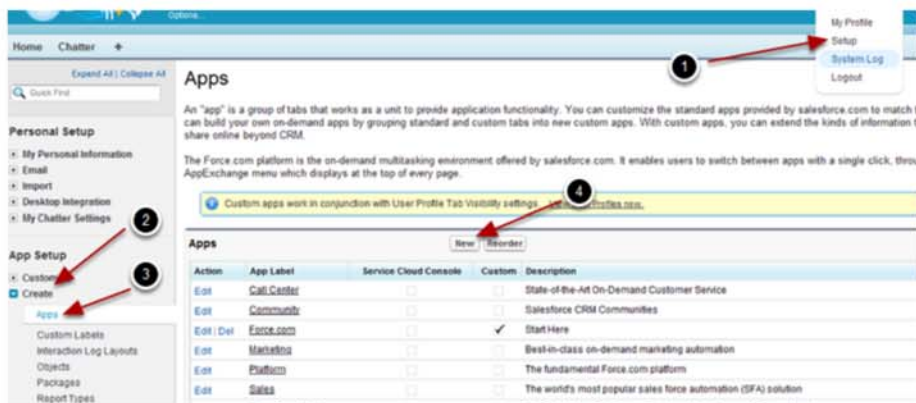
When installing, make sure to "Grant access to all users". You'll need to get confirmation that each package has installed successfully before attempting to install the next.

Confirm Installation



When complete, clicking on Setup (1) and then View Installed Packages (2) should show all five of your packages installed (3).

Create Apps



Next, we'll want to setup two new NPSP-specific apps to hold our tabs. One for our CRM, the other for the NPSP settings. We can do this by going to Setup (1), Create (2), Apps(3) and then clicking 'New' (4). If prompted, select 'Custom App'.

You'll then need to enter a name for your new app. This is the name that will appear in the drop-down list in the upper-righthand corner. You may choose any name you wish, the NPSP typically uses "Nonprofit CRM" and "Nonprofit Settings". You may also select a custom image to appear in the top-lefthand corner. Your organizations logo or picture may be used here. Please follow the help instructions for proper sizing and aspect ratios for the image.

Selecting Tabs for your App

New Custom App

[Help for this Page](#)

Step 4. Choose the Tabs Step 4 of 5

Choose the tabs to include in this custom app.

Available Tabs

- Cases
- Contracts
- Customizable Forecasts
- Products
- Solutions
- Portals
- Console
- Ideas
- Profile
- People
- Groups
- Files
- Jigsaw
- About Nonprofit Starter Packag

Selected Tabs

- Home
- Chatter
- Accounts
- Contacts
- Opportunities
- Campaigns
- Reports
- Dashboards
- Documents
- Leads
- Recurring Donations & Pledges

Add
Remove
Up
Down

Default Landing Tab: Home

Previous Next Cancel

You'll next need to select tabs for your app. For your Nonprofit CRM app, the NPSP typically uses the following tabs: Home, Chatter, Accounts, Contacts, Opportunities, Campaigns, Reports, Dashboards, Documents, Leads, Recurring Donations & Pledges

For your Nonprofit Settings app, the NPSP typically uses:

Contacts Settings, Households Settings, Opportunity Rollups, Affiliation Settings, User Rollups, About the Nonprofit Starter Pack

Click 'Next' to determine your Profile settings (more information below)

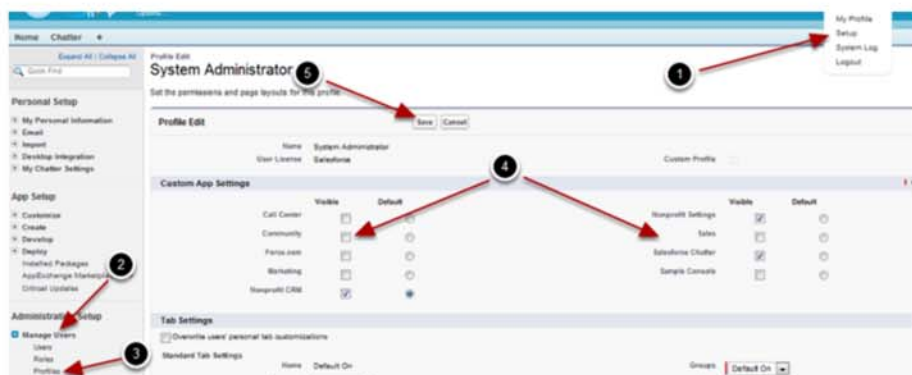
Setting Profile Visibility and Defaults for your Apps

Profile	Visible	Default
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input type="checkbox"/>	<input type="checkbox"/>
Customer Portal Manager Custom	<input type="checkbox"/>	<input type="checkbox"/>
Customer Portal Manager Standard	<input type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input type="checkbox"/>
High Volume Customer Portal	<input type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Read Only	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Silver Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Standard Platform User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

You'll next need to select the visibility of your app, as well as the default app for each of the profiles in your org. We recommend making the Nonprofit CRM visible and the default for most internal (non-portal) users, and the Nonprofit Settings app visible only for the System Administrator.

(Note: The profiles available in your organization may differ from the ones listed above)

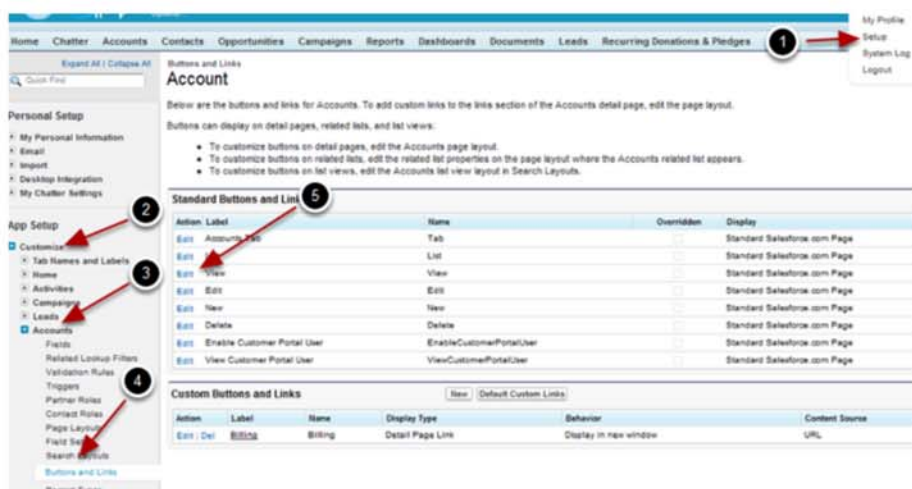
Removing Other Apps from View



You can optionally remove the visibility of other apps in your org. This is done on a profile-by-profile basis. Select the profile you want to edit by going to Setup (1) and then Manage Users (2) and the Profiles (3). Click 'Edit' next to the profile you wish to edit (not shown).

Finally, deselect any checkboxes for apps you do not wish to be visible for that profile (4). Click 'Save' when done (5).

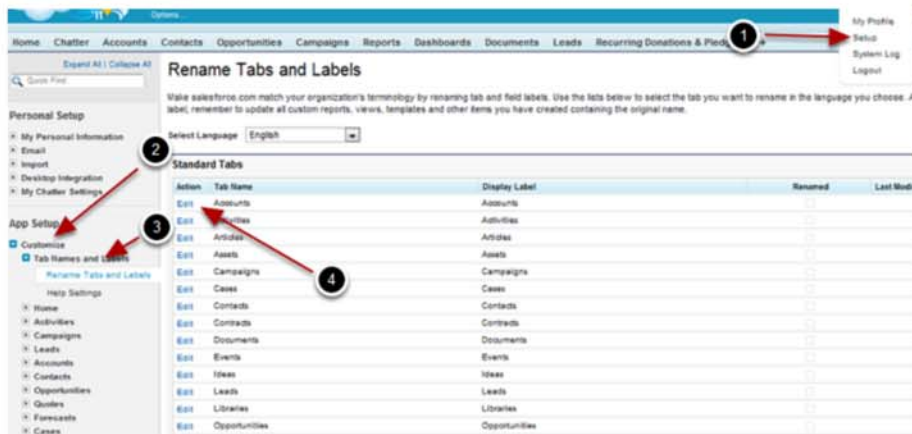
Visualforce Overrides



The Nonprofit Starter Pack also utilizes two different Visualforce overrides for standard actions. The first is the 1x1 Account View, the second is for Lead Conversion. For the Accounts, you can override the view by going to Setup (1), Customize (2), Accounts (3), Buttons and Links (4) and then clicking 'Edit' next to 'View' (5). Select 'Override with Visualforce Page' and select 'AccountViewOverride' and click 'Save' (not shown).

You'll then need to do the same for Lead Conversion. Setup (1), Customize (2), Leads (not shown), Buttons and Links and then clicking 'Edit' next to 'Convert'. Select 'Override with Visualforce Page' and select leadConvertOverride and click 'Save' (not shown).

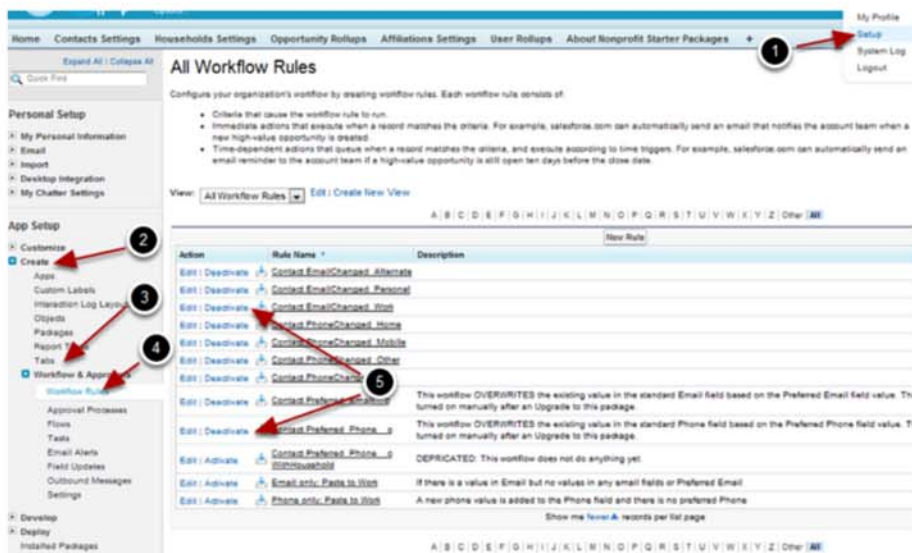
Renaming Tabs



You can optionally rename tabs by going to Setup (1), Customize (2), Tab Names and Labels (3) and clicking 'Rename Tabs and Labels'. As an example, click 'Edit' next to Accounts (4) and provide the new name for Accounts, and click 'Save' (not shown).

The process is the same for Opportunities or other standard tabs.

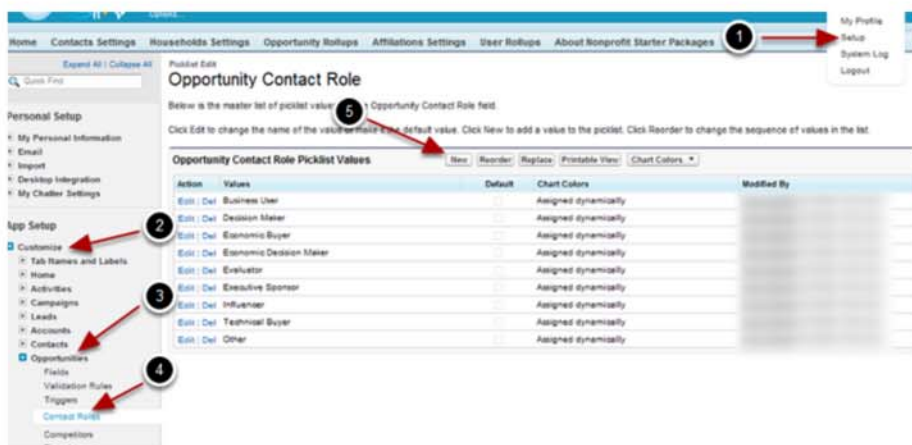
Turn on Workflow



The workflow that comes with the Nonprofit Starter Pack is disabled by default, you'll want to enable it. You can do so by going to Setup (1), Create (2), Workflow & Approvals (3), and then Workflow Rules (4). Click 'Activate' next to the workflow rules your organization wishes to use (5). If you're installing into an existing organization, you'll want to make sure you fully understand the implications of the workflow being enabled before installing. It is always recommended to test in a sandbox environment first.

The first 9 workflow rules are recommended for all organizations utilizing the Nonprofit Starter Pack.

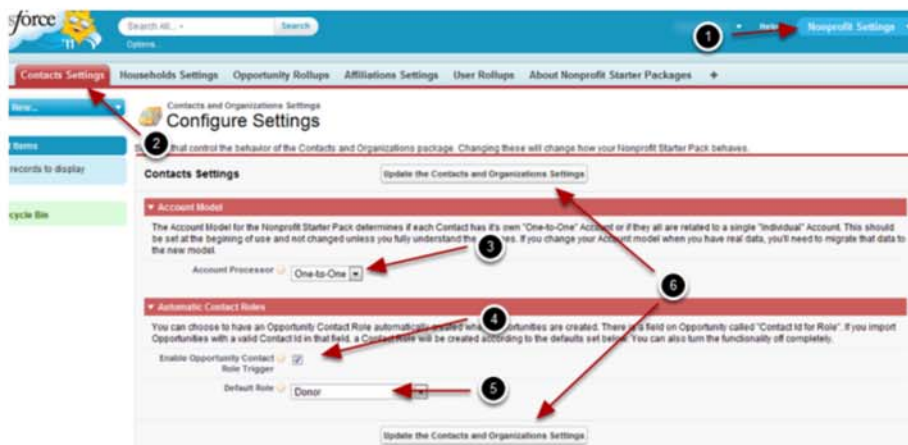
Opportunity Contact Roles



It is recommended that you create at least two new Opportunity Contact Roles. You can do this by going to Setup (1), Customize (2), Opportunities (3) and selecting Contact Roles (4). Click 'New' (5), and create two new roles, 'Donor' and 'Household Member'.

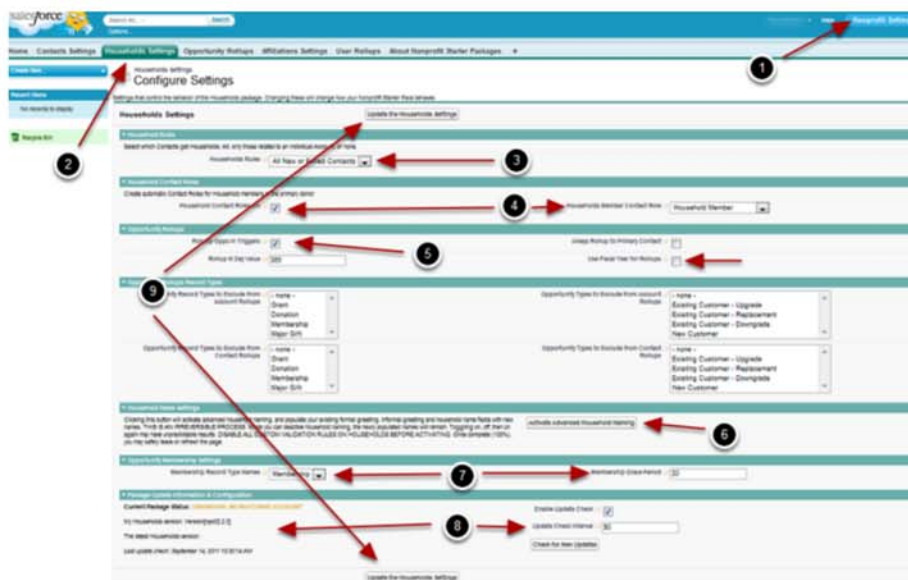
Note: DO NOT SET A DEFAULT Opportunity Contact Role!

Configure Contacts Settings



Next you'll want to configure your Contacts Settings. You can do this by selecting your Nonprofit Settings app (1), then the Contacts Settings tab (2). The default settings for the Nonprofit Starter Pack are using the One-to-One Account model (3). You can find more information about the Account model under the Contacts & Organizations section of this help site. Next, enable the Opportunity Contact Role trigger by checking the box (4). Then select your Default Role as 'Donor' (5). Finally, click 'Update the Contacts and Organizations Settings' to confirm your selections (6).

Configure Households Settings



Next you'll want to configure your Households Settings. You can do this by selecting your Nonprofit Settings app (1), then the Households Settings tab (2). The following settings are the defaults for the Nonprofit Starter Pack, you'll

want to configure them as appropriate for your organization:

3. Household Rules set to 'All New or Edited Contacts'
4. Household Contact Roles are checked, and Household Member Contact Role is set to 'Household Member'
5. Rollup Opps in Triggers is checked
6. Click Activate Advanced Household Naming
7. Select the 'Membership' record type as your Membership Record Type Name, and set your Membership Grace Period to 30.
8. Check 'Enable Update Check'
9. Click 'Update the Households Settings'

Page Layouts

You have several options to configure your page layouts. If you're comfortable with the Force.com IDE and the meta-data API, you can pull the default NPSP page layouts from Github. The URL for the repository can be found here: <https://github.com/SalesforceFoundation/NPSP-SignupOrg/tree/master/src/layouts> (<https://github.com/SalesforceFoundation/NPSP-SignupOrg/tree/master/src/layouts>)

Alternately, you can duplicate the layouts from the trial signup by manually copying them from below. There are four main layouts: Contacts, Accounts and two Opportunity Layouts. For the Opportunity layouts, you'll need to assign the layout to the appropriate record type. This can be found by going to Setup->Customize->Opportunities->Page Layouts->Page Layout Assignment. You'll also want to disable the default requirement of an 'Account' on the Contact page layout. Simply edit the existing Contact layout and click the wrench that is visible when hovering your mouse over the Account field. Uncheck the box for 'Read-Only'.

Contact Layout

Contact Detail		Edit Delete Clone Copy Address to Household	
▼ Contact Details			
Name	Sample Contact	Private	<input type="checkbox"/>
Household	Contact Household	Contact Owner	Change
Account Name	Sample Contact	Birthdate	
Title		Naming Exclusions	<input type="checkbox"/>
Description			
▼ Contact Information			
Preferred Phone		Preferred Email	
Home Phone		Personal Email	
Mobile		Work Email	
Work Phone		Alternate Email	
Other Phone		Fax	
▼ Address Information			
Primary Address Type		Secondary Address Type	
Mailing Address		Other Address	
▼ Donation Information			
First Gift Date		Last Gift Amount	\$0.00
Last Gift Date		Largest Gift	\$0.00
Average Gift	\$0.00	Smallest Gift	\$0.00
▼ Donation Totals			
Total Gifts	\$0.00	Total Number of Gifts	0
Total Gifts Last N Days	\$0.00	Number of Gifts Last N Days	0
Total Gifts This Year	\$0.00	Number of Gifts This Year	0
Total Gifts Last Year	\$0.00	Number of Gifts Last Year	0
Total Gifts Two Years Ago	\$0.00	Number of Gifts Two Years Ago	0
▼ Household Donation Info			
Total Household Gifts	\$0.00	Last Household Gift Date	
Total Household Gifts This Year	\$0.00		
Total Household Gifts Last Year	\$0.00		
▼ Membership Information			
Last Membership Origin		Membership Join Date	
Last Membership Date		Total Membership Amount	\$0.00
Last Membership Level			
Last Membership Amount	\$0.00		
Membership End Date			

Account Layout

Organization Detail		Edit Delete Include Offline	
Account Name	Sample Organization View Hierarchy	Account Owner	Change
Type		Phone	
Account Number		Fax	
		Website	
▼ Address			
Billing Address		Shipping Address	
▼ Description			
Description			
▼ Donation Information			
First Gift Date		Last Gift Amount	\$0.00
Last Gift Date		Largest Gift	\$0.00
		Smallest Gift	\$0.00
▼ Donation Totals			
Total Gifts	\$0.00	Total Number of Gifts	0
Total Gifts Last 260 Days	\$0.00	Number of Gifts Last N Days	0
Total Gifts This Year	\$0.00	Number of Gifts This Year	0
Total Gifts Last Year	\$0.00	Number of Gifts Last Year	0
Total Gifts Two Years Ago	\$0.00	Number of Gifts Two Years Ago	0
▼ System Information			

Donation Layout

Donation Detail [Edit](#) [Delete](#) [Clone](#) [Add Matching Donation](#)

▼ **Donation Information**

Opportunity Name	Sample Contact- Donation 9/14/2011	Private	<input type="checkbox"/>
Account Name	Sample Contact	Primary Campaign Source	
Amount	\$10.00	Recurring Donation	
Close Date	9/14/2011	Stage	Closed Won
Description		Probability (%)	100%
		Lead Source	

▼ **System Information**

Opportunity Owner	[Change]	Opportunity Record Type	Donation [Change]
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Membership Layout

Donation Detail [Edit](#) [Delete](#) [Clone](#)

Opportunity Name	Sample Contact- Donation 9/14/2011	Recurring Donation	
Account Name	Sample Contact	Private	<input type="checkbox"/>
Amount	\$50.00	Primary Campaign Source	
Close Date	9/14/2011	Probability (%)	100%
Stage	Closed Won	Is Opp From Individual	true
Description		Lead Source	
		Type	

▼ **Member Information**

Membership Start Date	9/14/2011	Member Level	Gold
Membership End Date	9/14/2012	Membership Origin	New

▼ **System Information**



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