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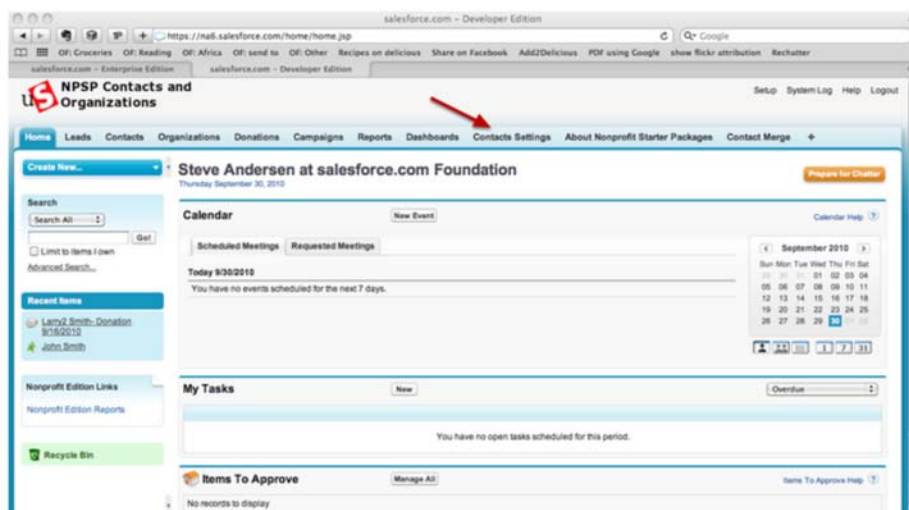
Version 1

Show Properties

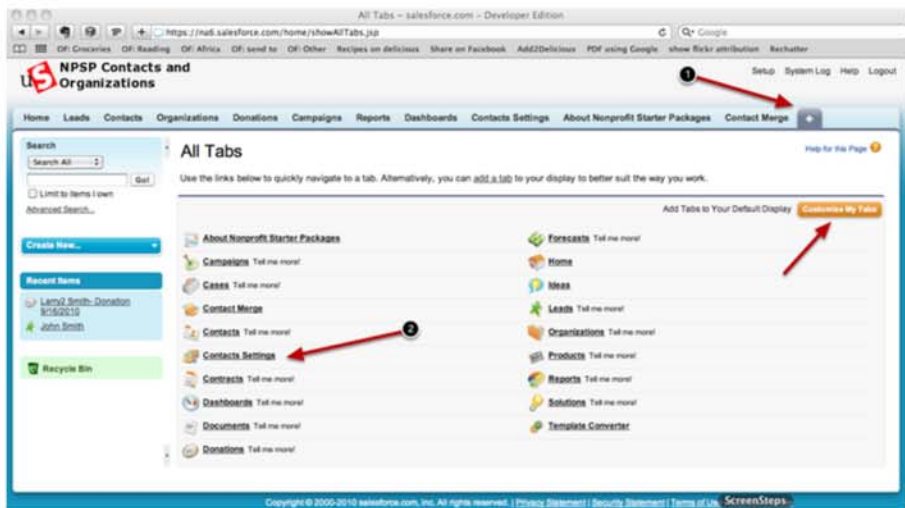
NPSP: Changing Contacts & Organizations Settings

The Nonprofit Starter Pack Contacts & Organizations package can be configured to run in a few different ways. This will show you how to change the configuration.

Go to the Contacts Settings tab

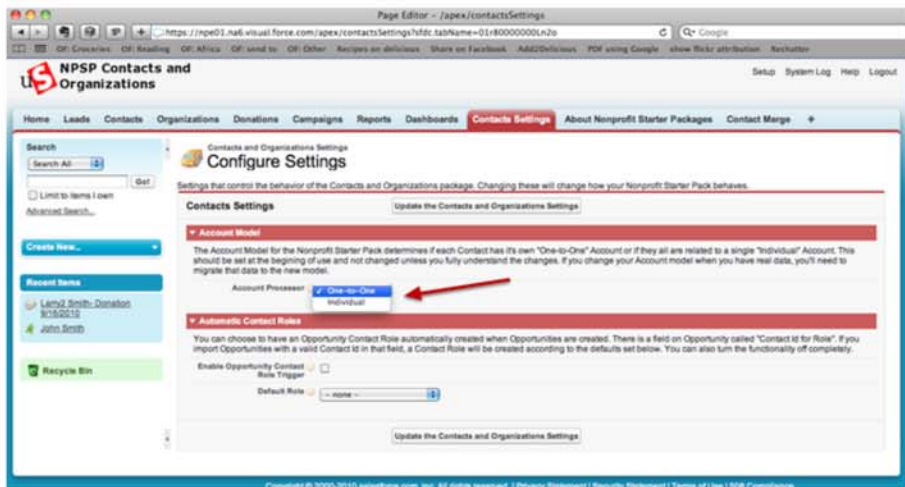


If you don't see the Tab, click the plus tab



Select the Contacts Setting Tab. You can add it to your tab set by clicking the Customize my Tabs button

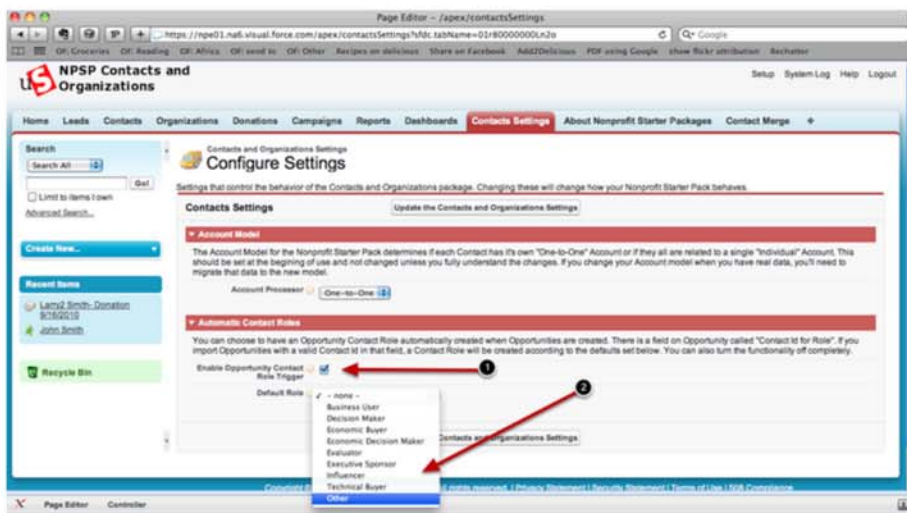
Select the configuration setting for the Account Model



There are two account models in the Nonprofit Starter Pack--One-to-one and Individual. Selecting One-to-one gives each unaffiliated Contact its own Account. Selecting Individual places all unaffiliated Contacts in a single account.

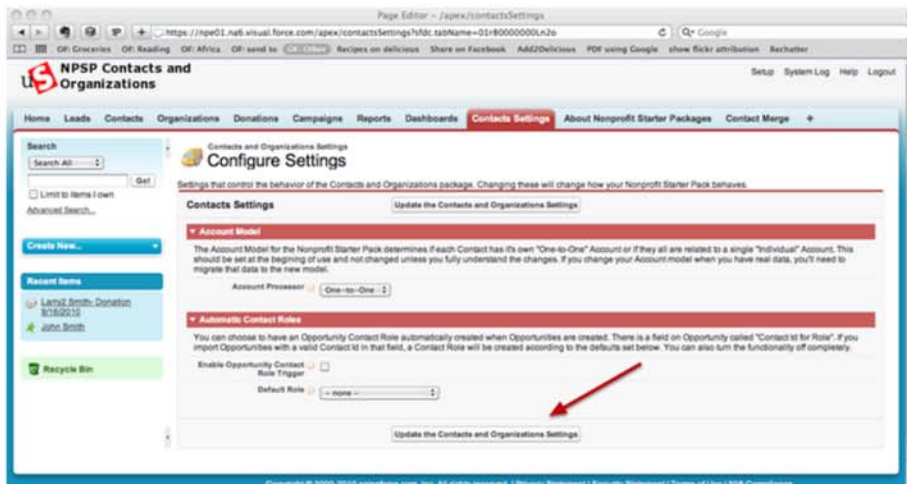
Once you select one of these options, all unaffiliated Contacts will be treated in the way you've selected.

Configure Automatic Contact Roles



When creating Opportunities (renamed Donations) you can supply a Contact Id in a field on the object. If you enable Opportunity Contact Role Trigger, a Contact Role will be created linking the Contact to the Opportunity. Select the Default Role value that should be used on that Contact Role.

Update the settings



Click Update to save your changes.



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