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NPSP: Updating to Contacts & Organizations Version 2

If you're running an earlier version of the Contacts & Organizations package, we recommend you update your package to take advantage of the new features. Here's a walk through of how to go through the process.

Confirm Package Details

Package Upgrade Details

Package Name	Contacts & Organizations
Version Name	2.1
Version Number	2.1
Publisher	salesforce.com Foundation
Description	

Installed Version Information

Package Name	Contacts & Organizations
Version Name	2.0.2
Version Number	2.0.2
Description	

[Continue](#) [Cancel](#)

Package Components

▼ Pages (9)

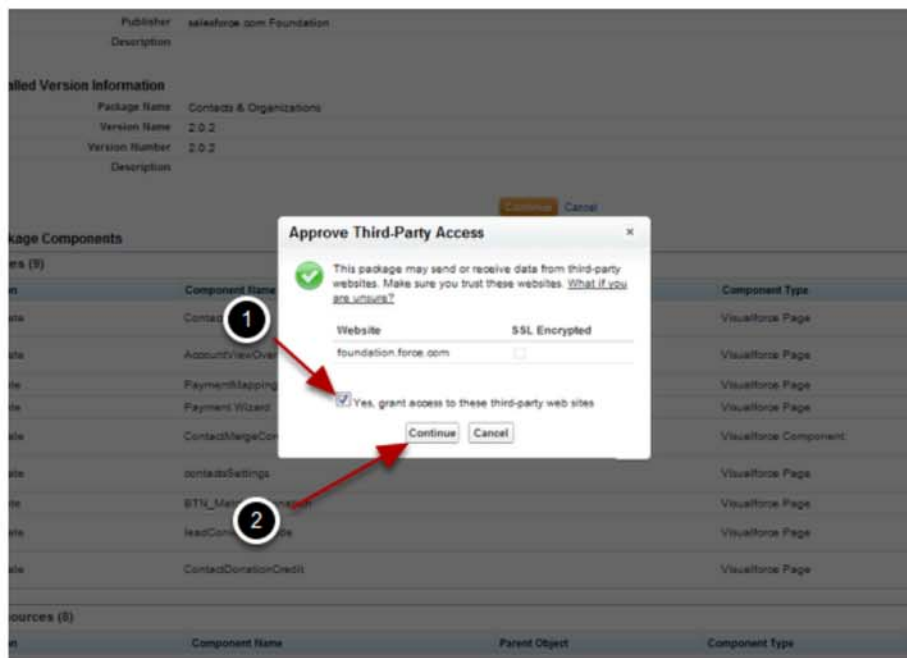
Action	Component Name	Parent Object	Component Type	Installation Notes
Update	ContactMerge		Visualforce Page	This is an upgraded component. It will be updated to the new version.
Update	AccountViewOverride		Visualforce Page	This is an upgraded component. It will be updated to the new version.
Create	PaymentMapping		Visualforce Page	This is a brand new component.
Create	Payment Wizard		Visualforce Page	This is a brand new component.
Update	ContactMergeContactDisplay		Visualforce Component	This is an upgraded component. It will be updated to the new version.
Update	contactsSettings		Visualforce Page	This is an upgraded component. It will be updated to the new version.
Create	BTM_MatchingDonation		Visualforce Page	This is a brand new component.
Update	LeadConvertOverride		Visualforce Page	This is an upgraded component. It will be updated to the new version.
Update	ContactDonationCredit		Visualforce Page	This is an upgraded component. It will be updated to the new version.

▼ Resources (8)

Action	Component Name	Parent Object	Component Type	Installation Notes
Update	Japanese		Language Translation	This is an upgraded component. It will be updated to the new version.
Create	Matching Donation	Donation	Button or Link	This is a brand new component.
Update	Add Matching Donation_DEPRECATED	Donation	Button or Link	This is an upgraded component. It will be updated to the new version.
Create	Schedule Payments	OppPayment__c	Custom Link within salesforce.com	This is a brand new component.
Update	French		Language Translation	This is an upgraded component. It will be updated to the new version.

Confirm the installation details and click 'Continue' when ready

Enable Remote Site Settings



Allow foundation.force.com access to your package. Click 'Yes, grant access to these third-party web site' (1) and then 'Continue' (2)

(This will not affect any data in your organization)

Grant Access to All Users



Select 'Grant Access to all users' (1) and click 'Next' (2)

Confirm Installation



When ready to install, click the 'Install' button.

Note: Installation can take a few minutes, an email will be sent once it is complete

Configure New Contacts Settings



Once your package is installed, navigate to the Contacts Settings (1). If the tab is not visible at the top of your row, you may need to change your app, (2) or click the '+' sign next to the list of tabs (3)

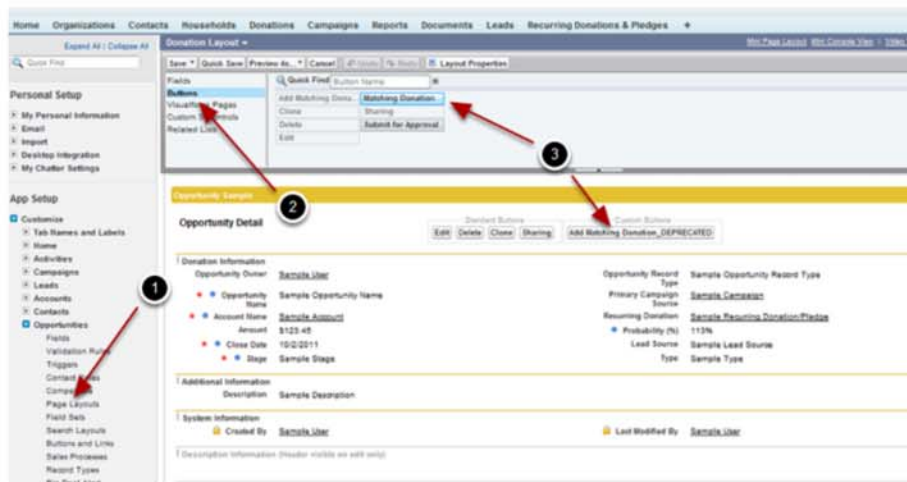
Click 'Enable Payments' (4) to enable the Payment object for your donation.

If you wish to create an Opportunity whenever you convert a lead, click 'Create Default Opportunity On Convert' (5) (*This behavior can be overridden when converting as well*)

Click 'Enable Update Check' (6) to automatically receive a notification in your settings page when a new version of this package is available. You can set your 'Update Check Interval' to vary the frequency of your check. (7)

Click 'Update the Contacts and Organizations Settings' to save your changes. (8)

Edit Layouts - New Matching Donation Button

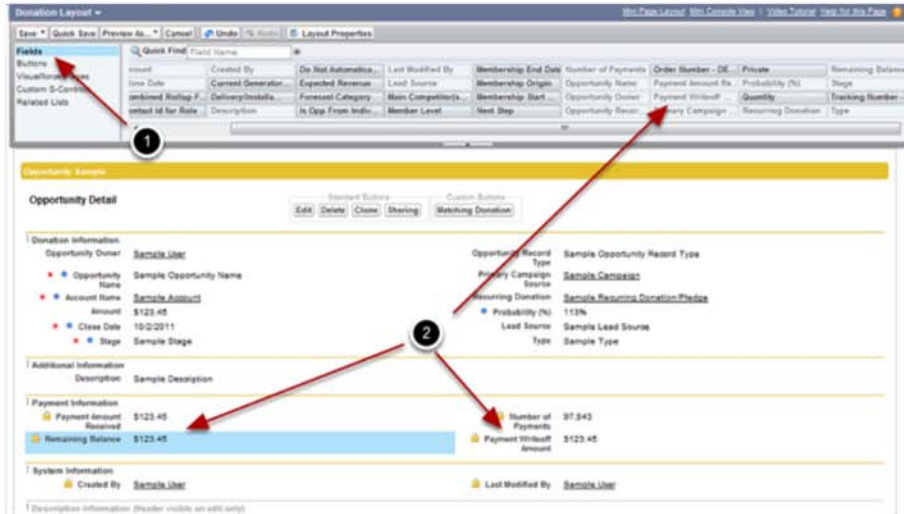


Go to Setup->Opportunities->Page Layouts to edit your Opportunity page layouts. (1)

Navigate to the 'Buttons' section (2)

Remove the old 'Add Matching Donation_DEPRECATED' button and replace with the new 'Matching Donation' button. (3)

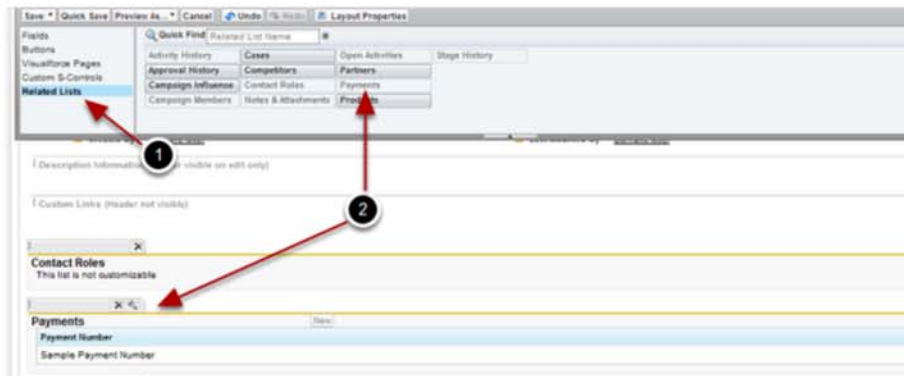
Edit Layouts - Payment Fields



Navigate to the 'Fields' section of the layout. (1)

Drag the four payments-related fields onto the layout. (2)

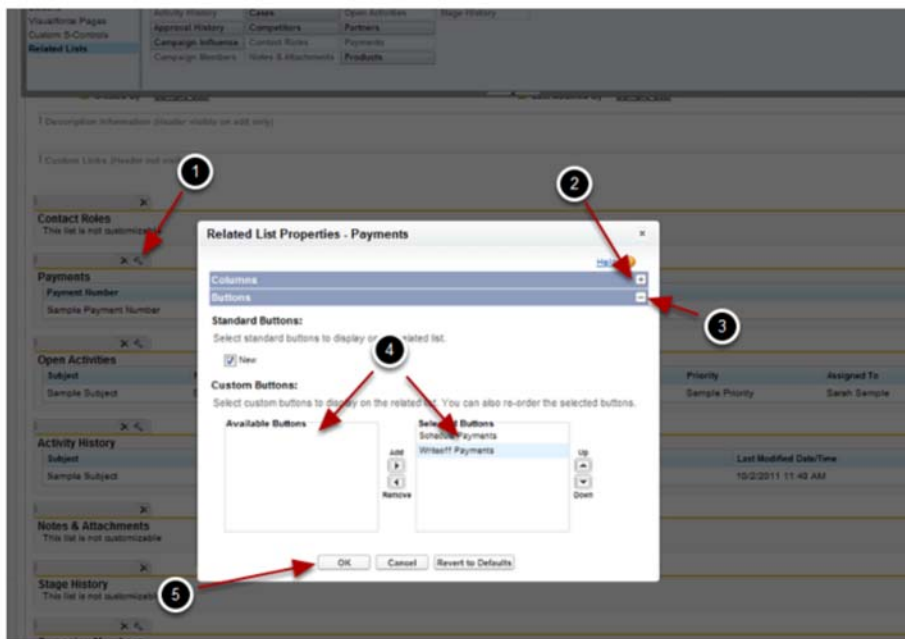
Edit Layouts - Payments Related List



Navigate to the 'Related Lists' section (1)

Drag the 'Payments' related list onto the page layout (2)

Edit Layouts - Payment Wizard Buttons



- Click the edit wrench on the Payments related list. (1)
- Optionally add additional columns to the related list (2)
- Expand the Buttons section (3) and select 'Schedule Payments' and 'Writeoff Payments' from the available buttons. (4)
- Click 'OK' (5) & save your page layouts. Repeat for other Donation (Opportunity) page layouts as needed.



(/_ui/core/userprofile/UserProfilePage?u=00580000003egB0AA) Attribution: Not required. License: CC BY-NC-SA
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