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NPSP: Add or Remove a Contact

This article contains these topics:

- Household Account Model: Contacts Overview
- Add a New Contact and Household
- Add a Contact to an Existing Household
- Remove a Contact from a Household

Check out the video!

■ Nonprofit Success Pack How-To Series: Create a Contact (http://www.youtube.com/watch?v=k382pT7eooU&list=PLU8xqF8ZASbXWAHIF0SB1P9_3G4vvRMXI&index=1)

NOTE: *This documentation is specific to organizations using the Household Account model in NPSP version 3.0 or later. For more information, see NPSP: What is an Account Model? (/articles/Resource/NPSP-What-is-an-Account-Model)*

Household Account Model: Contacts Overview

Nonprofit, Higher Education, and Membership organizations often rely on individual constituents to create strong and vibrant communities. These individuals might support or subscribe to an organization on their own or collectively, with a spouse and other family members. NPSP refers to these collectives as Households.

In the Nonprofit Success Pack, we recommend that you manage every constituent as a Contact record connected to a Household Account. Even if that Household only contains a single member, it will make your Household Account management easier if you treat your community members consistently.

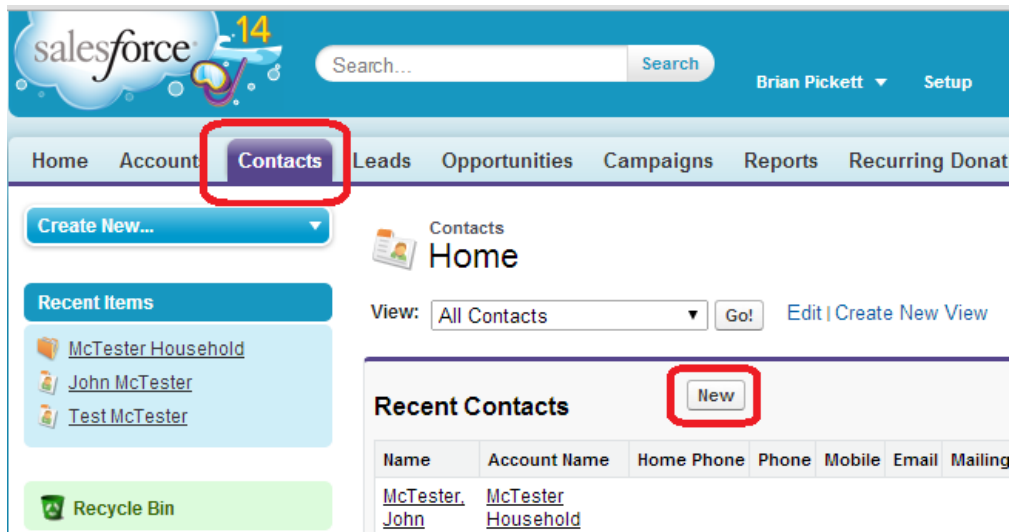
Add a New Contact and Household

Adding a new Contact in the Nonprofit Success Pack effectively creates a new Household. Here is the basic workflow for creating a new Contact and Household.

1. Make sure you're in the Nonprofit Success Pack application. If you're not, you'll need to select it from the upper-right hand corner in Salesforce.



2. Click the Contacts tab and click New.



3. Enter all relevant Contact details for your new Contact (including phone numbers, emails, and addresses), but **leave the Account Name field blank**. Leaving the Account Name field blank is the key step to creating a new Household.

A screenshot of the Salesforce Contact Edit form. The 'Contact Details' section is highlighted. The 'First Name' field contains 'Test', the 'Last Name' field contains 'McTester', and the 'Account Name' field is empty. A red box highlights the 'Account Name' field. The 'Private' checkbox is checked. The 'Birthdate' and 'Gender' fields are also visible.

Leave Account Name blank
to create a new Household.

4. When you're finished, click Save. Salesforce automatically creates a new Household, and derives the name of the new Household from the name of the new Contact. Salesforce formats the Household name according to the specifications in your Household Name Settings (**NPSP Settings | People | Households**).

Contact Detail Edit Delete Relationships Viewer

▼ Contact Details

Name	Test McTester	Private
Account Name	McTester Household	Birthdate
Primary Affiliation		Gender
Title		Naming Exclusions
Description		

Add a Contact to an Existing Household

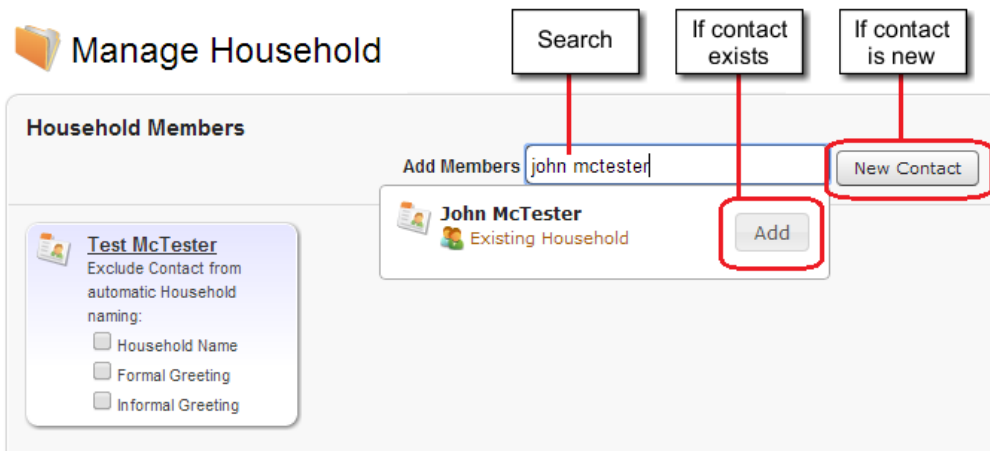
For Households that already exist in your Salesforce organization, you might need to add a spouse or a child as new contact. These contacts may or may not already exist in Salesforce.

1. In the NPSP, search for the Household you're interested in (for example, "Smith Household"), or click the Accounts tab to see a list of recent Accounts.
2. Click the Account Name of the Household Account you want to add the Contact to, and then click the Edit button.

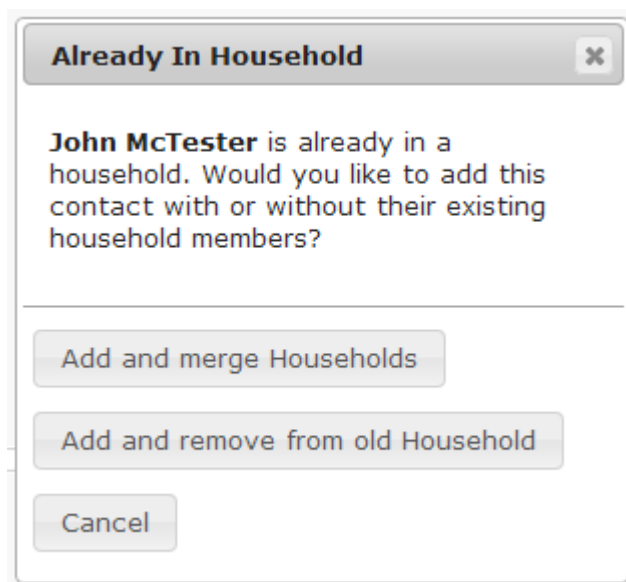
Account Detail Edit Delete

Account Name	McTester Household View Hierarchy	Phone
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3. Do one of the following:
- If the Contact does not yet exist in Salesforce, click the New Contact button, enter the Contact's name in the Contact card, and then click Save.
 - If the Contact already exists in Salesforce, begin typing the Contact's name, wait for the Contact to appear, and then click the Add button.



When adding an existing Contact, decide if you want to merge the new Contact's entire Household in with current Household, or simply remove the Contact from their existing Household.



NOTE: If the Contact is the last remaining member of their Household, that Household will be deleted automatically.

4. Click Save.

Remove a Contact from a Household

Occasionally you might want to remove a Contact from a Household.

1. In the NPSP, search for the Household you're interested in (for example, "Smith Household"), or click the Accounts tab to see a list of recent Accounts.
2. Click the Account Name of the Household Account you want to remove the Contact from, and then click the Edit button.
3. Hover your mouse over the Contact card, click the Delete (-) icon in the upper-right corner.



4. Click Save.

The contact will no longer be a member of this Household but will still exist in Salesforce. In fact, Salesforce will automatically create a new Household for this Contact. To DELETE a contact from Salesforce (rarely recommended), navigate to the Contact record and click the Delete button. If the Contact is the last remaining member of their Household, Salesforce automatically deletes the Household.



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North Peak

