

# NPSP: Mark a Contact as Do Not Contact or Deceased

This article contains these topics:

- Mark a Contact as Do Not Contact
- Mark a Contact as Deceased
- Remove Contacts Marked Do Not Contact from Reports
- What if I don't see these fields?

At some point, you will have a contact who is deceased or a contact who has asked to be removed from your lists and not contacted again. In both of these situations, you want to remove the person from your mailing lists. For a deceased contact, you also want to make sure that the contact's name doesn't appear in the Household naming fields.

## Mark a Contact as Do Not Contact

1. In the Nonprofit Success Pack, navigate to the Contact record of the person you want to mark as Do Not Contact and click **Edit**.
2. Select the Do Not Contact checkbox and click **Save**.

When you save the record, Salesforce automatically selects the Do Not Call and Email Opt Out standard fields.

[Cohort Members \(Contact\) \[1\]](#) | [Relationships \[1\]](#) | [Organizations \[1\]](#)

### Contact Detail

[Edit](#) [Delete](#) [Details](#)

#### Contact Details

Name	Maria Sanchez
Account Name	<a href="#">Sanchez and Smith Household</a>
Formal Household Greeting	Maria Sanchez and John Smith
Do Not Contact	<input checked="" type="checkbox"/>
Deceased	<input type="checkbox"/>
Email Opt Out	<input checked="" type="checkbox"/>

## Mark a Contact as Deceased

1. In the Nonprofit Success Pack, navigate to the Contact record of the person you want to mark as deceased and click **Edit**.
2. Select the Deceased checkbox and click **Save**.

When you save the record, Salesforce automatically selects the Do Not Contact, Do Not Call, and Email Opt Out fields. In addition, Salesforce removes the contact from all Household name fields. (In the above example, Sanchez and Smith Household changes to Smith Household. Formal Greeting changes from Maria Sanchez and John Smith to John Smith).

The screenshot shows the 'Contact Detail' page for Maria Sanchez. At the top right are buttons for 'Edit', 'Delete', 'Donor Profile', and 'Re...' (partially visible). Below the header is a section titled 'Contact Details' with a dropdown arrow. The details are as follows:

Name	Maria Sanchez
Account Name	Smith Household
Formal Household Greeting	John Smith
Do Not Contact	<input checked="" type="checkbox"/>
Deceased	<input checked="" type="checkbox"/>
Email Opt Out	<input checked="" type="checkbox"/>

Below the details is a section titled 'Contact Information' with a right-pointing arrow.

## Remove Contacts Marked Do Not Contact from Reports

You will want to update your reports used for communications or mailings to filter out the contacts you've marked Do Not Contact.

1. In the Nonprofit Success Pack, navigate to the Report that you want to use.
2. Select Customize on the Report.
3. Click **Add** next to Filter and select Field Filter.
4. Add Do Not Contact equals False to the filter.
5. Click **Save**.

The screenshot shows the 'Report Builder' interface for a report titled 'Unsaved Report' of type 'Contacts & Accounts'. At the top are buttons for 'Save', 'Save As', 'Close', 'Report Properties', 'Add Report Type', and 'Run Report'. The interface is divided into 'Fields' and 'Filters' sections.

**Fields:** A 'Quick Find' search bar is at the top. Below it, a list of fields is shown, including 'Bucket Fields', 'Add Bucket Field', 'Contact: General', 'Contact Owner', and 'Contact Owner Alias'. A message says 'Drag and drop to add fields to the report.'

**Filters:** A section titled 'Filters' with an 'Add' button. Below it, a 'Show' dropdown is set to 'All accounts'. A 'Date Field' section shows 'Created Date' with a 'Range' of 'All Time'. The filter criteria is 'Do Not Contact equals "False"'. There are 'From' and 'To' date pickers.

# What if I don't see these fields?

If you upgraded to the Nonprofit Success Pack from a previous version, or signed up for your NPSP trial before February 10, 2015, then you will likely need to:

- Set field-level security to expose these fields to each profile you want to grant access to
- Add the fields to your page layouts.

## Set field-level security

1. In Salesforce, click **Setup** in the upper right-hand corner.
2. Under **Build | Customize** on the left-hand side, click **Contacts | Fields**.
3. Find the Deceased field, under Custom Fields. Click on the word Deceased. (Be sure to click the word Deceased, and not the Edit link.)
4. Click on **Set Field Level Security**.
5. Select the Visible checkboxes for the appropriate profiles and click **Save**.
6. Click **Back to Contact fields**.
7. Repeat the previous steps for the Do Not Contact field.

Set Field-Level Security  
Do Not Contact

Save Cancel

Field Label Data Type	Do Not Contact Checkbox
Field-Level Security for Profile	
ALF Read Only	<input checked="" type="checkbox"/> Visible <input type="checkbox"/> Read-Only
ALF Staff	<input checked="" type="checkbox"/> <input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/> <input type="checkbox"/>
FormAssembly	<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"/>
Solution Manager	<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"/>

## Update Page Layout

1. In Salesforce, click **Setup** in the upper right-hand corner.
2. Under **Build | Customize** on the left hand side, click **Contacts | Page Layouts**.
3. Click **Edit** next to the page layout you want to change.
4. Drag the Deceased and Do Not Contact fields from the top on to the page layout and click **Save**.
5. Repeat the previous steps for all Page Layouts you use.



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