

NPSP: Phone and Email Workflow Rules

This article provides more information about the phone and email workflow rules that come with the Nonprofit Success Pack.

This article contains these sections:

- Overview
- Where to Find Workflow Rules
- Email and Phone Fields and Workflow Rules for NPSP
- Workflow Rule Considerations

Overview

In Salesforce, a workflow rule causes certain actions to happen, when certain criteria are met. For example, the `Contact.EmailChanged_Work` workflow rules tells Salesforce to fill in the Work Email field with the value in the standard email field, every time you change or enter a standard email for a new or existing Contact. The Nonprofit Success Pack comes with a number of workflow rules, which you can adjust or disable to your liking.

Where to Find Workflow Rules

To see the pre-loaded NPSP workflow rules:

1. In **Setup**, enter `Workflow Rules` in the Quick Find box, then select **Workflow Rules** from the Workflow & Approvals menu.
2. Read the "What is Workflow" page if you haven't ever done that before!
3. Click **Continue**. You will see a list of all workflow rules in your Salesforce org.
4. Click on the rule name to see the rule detail and related workflow actions.

For more information about workflow rules, see [Workflow](https://help.salesforce.com/apex/HTViewHelpDoc?id=customize_wf.htm) (https://help.salesforce.com/apex/HTViewHelpDoc?id=customize_wf.htm) and [Create a Workflow Rule](https://help.salesforce.com/apex/HTViewHelpDoc?id=workflow_rules_new.htm) (https://help.salesforce.com/apex/HTViewHelpDoc?id=workflow_rules_new.htm) in the Salesforce Help & Training.

Email and Phone Fields and Workflow Rules for NPSP

If your organization uses the custom NPSP phone and email fields, these workflow rules enforce your organization's business rules and help you to maintain consistent data.

NPSP Custom Fields Used in Workflow Rules

- **Preferred Phone** - Picklist field used to identify the phone number preferred by this Contact; home, work, mobile or other. The standard Phone field is updated with the preferred phone number.
- **Home Phone** - Phone number field for the Contact's home phone number.
- **Work Phone** - Phone number field for the Contact's work phone number.
- **Mobile Phone** - Phone number field for the Contact's mobile phone number.
- **Other Phone** - Phone number field for an additional phone number for the Contact.
- **Preferred Email** - Picklist field used to identify the email address preferred by this Contact; personal, work, or alternate. The standard Email field is updated with the preferred email address.
- **Personal Email** - Email field for the Contact's personal email address.
- **Work Email** - Email field for the Contact's work email address.
- **Alternate Email** - Email field for an additional email address for this Contact.

Email Workflow Rules

Workflow Rule	Description	When Run/Evaluated
Contact.EmailChanged_Alternate	If the standard Salesforce Email field is newly entered or changed AND the Preferred Email picklist is set to Alternate THEN Salesforce will fill in the Alternate Email field with the email address entered in the standard email field.	When a contact is created, and every time it's edited.
Contact.EmailChanged_Personal	If the Salesforce Email field is newly entered or changed AND the Preferred Email picklist is set to 'Personal' or 'Home' THEN Salesforce will fill in the Personal Email field with the email address entered in the standard email field	When a contact is created, and every time it's edited.
Contact.EmailChanged_Work	If the standard Email field is newly entered or changed AND the Preferred Email picklist is set to 'Work' THEN fill in the Work Email field with the email address entered in the standard email field.	When a contact is created, and every time it's edited.
Contact.Preferred_Email__c	This workflow OVERWRITES the existing value in the standard Email field based on the Preferred Email field value.	When a contact is created, and every time it's edited.
Email only: Paste to Work	If there is a value in the standard Email field AND no values in any of the custom email fields (Personal, Work or Alternate) AND there is no value selected in the Preferred Email picklist, this Workflow updates 2 fields: Work Email is updated with the email address and Preferred Email is set to Work.	Evaluate the rule when a contact is created, and any time it's edited to subsequently meet the criteria.

Phone Workflow Rules

Workflow Rule	Description	When Run/Evaluated
Contact.PhoneChanged_Home	If the standard Phone field is newly entered or changed AND the Preferred Phone picklist is set to 'Home' THEN fill in the Home Phone field with the phone number entered in the standard phone field.	When a contact is created, and every time it's edited.
Contact.PhoneChanged_Mobile	If the standard Phone field is newly entered or changed AND the Preferred Phone picklist is set to 'Mobile' THEN fill in the Mobile Phone field with the phone number entered in the standard phone field.	When a contact is created, and every time it's edited.
Contact.PhoneChanged_Other	If the standard Phone field is newly entered or changed AND the Preferred Phone picklist is set to 'Other' THEN fill in the Other Phone field with the phone number entered in the standard phone field.	When a contact is created, and every time it's edited.
Contact.PhoneChanged_Work	If the standard Phone field is newly entered or changed AND the Preferred Phone picklist is set to 'Work' THEN fill in the Work Phone field with the phone number entered in the standard phone field.	When a contact is created, and every time it's edited.
Contact.Preferred_Phone__c	This workflow OVERWRITES the existing value in the standard Phone field based on the Preferred Phone field value.	When a contact is created, and every time it's edited.
Phone only: Paste to Work	If there is a value in the standard Phone field AND no values in any of the custom phone fields (Home, Work, Mobile or Other) AND there is no value selected in the Preferred Phone picklist, this Workflow updates 2 fields: Work Phone is updated with the phone number and Preferred Phone is set to Work.	Evaluate the rule when a contact is created, and any time it's edited to subsequently meet the criteria.

Workflow Rule Considerations

- If you are setting the standard **Email** field via import or a third party app, the NPSP **Email only: Paste to Work** workflow keeps the standard **Email** field in sync with the NPSP custom fields.
- If you are using only the standard Email and Phone fields and removed the NPSP custom fields from your page layouts (i.e., they are not in use), it does no harm to leave the workflow rules activated. You can simply ignore them. In fact, it may help to keep them active in case you change your process in the future and/or your third party email marketing tool interfaces with these fields.



(http://creativecommons.org/licenses/by-nc-sa/3.0/deed.en_US)

This work is licensed under a Creative Commons
Attribution-NonCommercial-ShareAlike 3.0 Unported
License. <https://creativecommons.org/licenses/by-nc-sa/3.0/>

(/ui/core/userprofile/UserProfilePage?u=00580000007qhGZAAAY) Contributions by Beth Saunders
(/ui/core/userprofile/UserProfilePage?u=00580000007qhGZAAAY) license (https://creativecommons.org/licenses/by-nc-sa/3.0/deed.en_US).
Beth Saunders Consulting



brought to you by



Copyright ©2000-2016 Salesforce.org | Community Guidelines | Terms of Service | Logout