

NPSP: Create and Manage Levels

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Overview

NPSP Levels give you a way to track a constituent's level of commitment and engagement based on criteria such as total gifts or number of hours volunteered. For example, you may have defined Levels for donors based on the total gifts they've donated over time. A donor who's donated \$0 to \$100 dollars would be at the Bronze Level, \$101 - \$1000 at the Silver Level, \$1001 - \$10,000 at the Gold Level, and so on.

This information is important for helping to recognize milestones and determine how to continue building on and fostering the relationship.

In addition, Levels work with Engagement Plans so nonprofits are able to outline what, who, how, and how often to communicate with the constituent and keep them moving up the ladder of engagement.

Here's an example of a Level structure for Accounts:

Level Name	Target	Source Field	Level Field	Minimum Amount (>=) ↑	Maximum Amount (<)	Active
Bronze	Account	npo02__OppAmountThisYear__c	Level__c		100.00	✓
Silver	Account	npo02__OppAmountThisYear__c	Level__c	100.00	1,000.00	✓
Gold	Account	npo02__OppAmountThisYear__c	Level__c	1,000.00	10,000.00	✓
Platinum	Account	npo02__OppAmountThisYear__c	Level__c	10,000.00		✓

Note: Don't let the field names scare you! NPSP provides drop-downs to choose from when you define and edit your Levels.

LEVEL

Bronze

* Level Name

Bronze

* Target

Account

--None--

✓ Annual Revenue

Average Gift

Best Gift Year Total

Billing Latitude

Billing Longitude

Employees

Once configured for an object, the fields you created for Level and Previous Level are automatically calculated on a nightly basis.

Largest Gift ⓘ \$1,000.00

Smallest Gift ⓘ \$80.00

Best Gift Year Total ⓘ \$1,080.00

Level Gold

Previous Level Bronze

Setup—Before You Begin

If you started using NPSP at version 3.81

(<https://github.com/SalesforceFoundation/Cumulus/releases/tag/rel%2F3.81>) (September 2016) or later, you can skip this entire section and move on to Create Levels. If you don't know which version of NPSP you're using, check out Which Version of Nonprofit Success Pack Am I Using? (/articles/Resource/Which-Version-of-NPSP-Am-I-Using) to find out.

- Enable the Level Object
- Create Level Fields
- Enable Levels on Other Objects

Enable the Level Object

The **Level** object is new to NPSP.

Go to **Setup | Profiles** and edit the profiles for all users who will work with Levels to include the following permissions and settings:

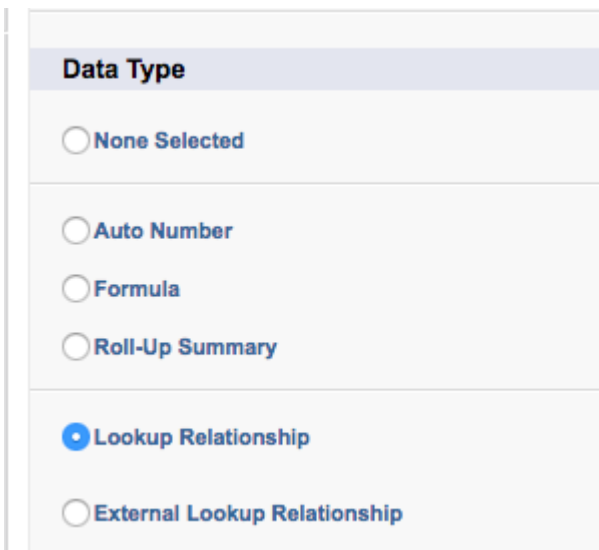
- Tab Settings set to **Default On**.
- Object permissions set to **Read**, **Create**, **Edit**, and **Delete**.
- For the System Administrator profile, Object Permissions set to **Modify All** and **View All**.
- In the Field Level Security section, the **Read Access** and **Edit Access** boxes are checked for each new field.

If you're not sure how to update the permissions and fields for these objects, see [Enable New Features \(/articles/Resource/NPSP-Enable-New-Features\)](/articles/Resource/NPSP-Enable-New-Features).

Create Level Fields

In order to show a Level or Previous Level on the Contact or other record, you need to add fields. These instructions are for the Account object, but you can repeat on Contact or any other object using Levels as well.

1. In Setup, enter `Fields` in the Quick Find box, then select **Fields** under the Accounts menu. Create a new field to display the Level. It doesn't matter what you name it (we suggest simply **Level**). Be sure to select Lookup Relationship as the field type and Level as the related object.



The screenshot shows a 'Data Type' selection interface. It has a header 'Data Type' and a list of radio button options. The 'Lookup Relationship' option is selected, indicated by a blue dot. The other options are 'None Selected', 'Auto Number', 'Formula', 'Roll-Up Summary', and 'External Lookup Relationship'.

2. Create a second Lookup Relationship field called **Previous Level** that is related to the Level object. If selected when you create a Level, this field will automatically be populated if a Contact or Account (or other object you configured Levels for) moves between Levels.

For example, this Level has the Level and Previous Level fields filled in:

LEVEL

Platinum

* Level Name

Platinum

* Target

Account

* Source Field

Total Gifts This Year

* Level Field

Level

Previous Level Field

Previous Level

So, when an Account's Total Gifts This Year moves from the Gold Level to the Platinum Level, the Level field AND the Previous Level field on the Account are updated:

▼ Donation Information

Level	<u>Platinum</u>
Previous Level	<u>Gold</u>

Enable Levels on Other Objects


You can add Levels to other objects by including additional picklist values on the Target field on the Levels object.

1. In Setup, enter **Objects** in the Quick Find box, then click **Objects** under the Create menu.
2. In the list of objects, click **Level** (don't click Edit).
3. In the list of Custom Fields, click **Target** (don't click Edit).
4. In the Picklist Value Set, click **New**.

Level Custom Field Target (Managed)

[Help for this Page](#) ?

[Back to Level](#)

 This Custom Field Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Custom Field Definition Detail

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#)

Field Information

Field Label	Target	Object Name	Level
Field Name	Target	Data Type	Picklist
Namespace Prefix	np		
API Name	np__Target__c		
Description	The object that this Level applies to.		
Help Text	The object that this Level applies to.		
Created By	Nonprofit Starter Pack, 9/20/2016 6:02 PM	Modified By	Nonprofit Starter Pack, 9/20/2016 6:02 PM

Picklist Value Set

[New](#) [Reorder](#) [Replace](#) [Printable View](#) [Chart Colors](#) [Picklist Value Set Help](#) ?

Action	Values	Default	Chart Colors	Modified By
Edit Del Deactivate	Account	<input type="checkbox"/>	Assigned dynamically	Nonprofit Starter Pack, 9/20/2016 6:02 PM
Edit Del Deactivate	Contact	<input type="checkbox"/>	Assigned dynamically	Nonprofit Starter Pack, 9/20/2016 6:02 PM

Inactive Picklist Values

No Inactive Picklist Values values defined.

5. Enter the API name (not the label) for the object. For example, if your custom object has the label of Registrants (that's what appears on your tab), and has the API name of Registrants__c, you would add Registrants__c as a picklist value for that field.

Add Picklist Values

Target

Add one or more picklist values below. Each value should be on its own line.

Registrants__c

[Save](#) [Cancel](#)

6. Click **Save**.

Don't forget to create Level fields on the object after enabling it.

Create Levels

You only need to set up your levels once and thereafter NPSP will monitor the fields you've selected and automatically update related Level fields on a nightly basis.

1. Click the **Levels** tab from the tab bar or All Tabs.
2. You can review already created Levels on this page or from a custom list view.
3. Click **New** to create a new Level. You'll see a special interface designed to help you select the correct fields without knowing the API Developer Name.

The screenshot shows the 'LEVEL' creation form in NPSP. It features several input fields and checkboxes, each with a red circle and a number indicating its function:

- 1**: Level Name (Text field containing 'Bronze')
- 2**: Target (Dropdown menu containing 'Account')
- 3**: Source Field (Dropdown menu containing 'Total Gifts')
- 4**: Level Field (Dropdown menu containing 'Level')
- 5**: Previous Level Field (Dropdown menu containing 'Previous Level')
- 6**: Maximum Amount (<) (Text field containing '100')
- 7**: Engagement Plan Template (Text field, currently empty)
- 8**: Active (Checkbox, currently checked)

Additional fields include 'Minimum Amount (>=)' (empty), 'Description' (text area containing 'The first Level'), and a 'Previous Level Field' label above the dropdown.

Level Name (1)—The Name that will appear in the Level field on the Account or Contact. You must type in a name before you can enter any other fields.

Target (2)—The object that this level applies to. Select either Account or Contact. See [Enable Levels on Other Objects](#) for how to add additional objects.

Source Field (3)—The field that will be totaled across all records to determine what Level the Contact or Account is in. For our example, we selected Total Gifts (a currency field) however you can select any currency or number field.

Level Field (4)—Remember that custom field you created earlier? Here's where you select it.

Previous Level Field (5)—This field is optional. It stores the previous Level value if the Level changes. Select the custom Previous Level field you created earlier.

Minimum and Maximum Amount (6)—This defines the range of this Level. You can leave Minimum blank to cover all up to (but not including) the Maximum Amount. Likewise, you can leave Maximum Amount blank to cover all amounts over (and including) the Minimum Amount (such as your very top level). Remember, Amount is not necessarily currency.

Engagement Plan Template (7)—If you want to have a series of Task Activities that are automatically generated when a Contact or Account reach a certain Level, this is where you would select that Engagement Plan. See [Create and Manage Engagement Plans \(/articles/Resource/NPSP-Create-and-](#)

Manage-Engagement-Plans) for information on configuring and using Engagement Plans.

Make sure **Active** is checked and give your Level an appropriate **Description (8)**.

4. If this is the first Level you're creating, click **Save & New**. This will automatically clone the existing Level and adjust the Maximum and Minimum values. Just give the new Level a name. You can very quickly set up a series of Levels this way. Click **Save** on the final Level.

Manually Recalculate Levels

That's it! Now, as the Source Field changes on your Account or Contacts, Levels are automatically calculated (on a nightly basis). Due to the processing involved, Levels are not applied instantly. Instead, Levels will be updated as part of the nightly batch process that NPSP runs. However, at any time you can update all your records with the correct Levels. Simply navigate to **NPSP Settings | Bulk Data Process | Level Assignment Batch** and click **Run Batch**.

****Special thanks to Brian Pickett, who also contributed to this documentation.****



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