

# Troubleshooting the Nonprofit Success Pack

This article will help you fix the following issues:

- Why aren't my roll-up summary fields working properly?
- When I try to create a new contact in NPSP, the account isn't automatically created or I get an error
- I entered all my contacts and their donation information, but every night that data is disappearing!
- NPSP Data Importer error "The matching field you chose (Record ID) is not mapped and is required for an Update and Insert operation."
- NPSP installation failed with this error "Unmanaged custom object tab already exists."
- NPSP installation failed with this error "Opportunity Record Types - pick list value, prospecting not found"

## Why aren't my roll-up summary fields working properly?

There can be multiple reasons why roll-up summary fields aren't rolling up, or aren't showing the values you expect. Check out this article (</articles/Resource/NPSP-Troubleshoot-Rollups>) to learn about some common issues.

## When I try to create a new contact in NPSP, the account isn't automatically created or I get an error.

You're probably using a Contact page layout that has the Account field set to Required. Either edit the page layout you're using and uncheck the Required box on the Account field, or use the Contact page layout that comes with NPSP. To update or change the Contacts page layout, from Setup, enter **Contacts** in the Quick Find box, then select **Page Layouts**.

## I entered all my contacts and their donation information, but every night that data disappears.

On a contact, you must enter donation history as separate Opportunity records (using the Opportunities related list). You shouldn't enter data directly in to the fields on the Contact or Account that begin with "Best,"

“First,” “Last,” “Number,” “Soft Credit,” “Membership,” or “Total.” Those fields are automatically calculated every night, and if there aren't any opportunity records for the automation to pull from, the fields are reset to 0 and your entered data is lost. Check out the Fundraising Trail ([https://trailhead.salesforce.com/en/trail/nonprofit\\_fundraising](https://trailhead.salesforce.com/en/trail/nonprofit_fundraising)) to learn how Contact, Account, and Opportunity records are related. See this article (/articles/Resource/NPSP-Opportunity-Donation-Rollups-Overview) for more information on how donation roll up fields work.

When I try to import data using the NPSP Data Importer, I get this error “The matching field you chose (Record ID) is not mapped and is required for an Update and Insert operation.”

When importing to the NPSP Data Import object, you must **insert** the records. You are not matching on existing records at this point; that comes later when you run the utility from the NPSP Data Import tab. Make sure that in the Salesforce Data Import Wizard you have selected **--None--** for ALL matching fields. If you're using Data Loader or another tool, ensure that you've selected **insert** and NOT upsert or update. Check out the NPSP Administrator's Guide to Importing Donor Data (/articles/Resource/NPSP-Administrators-Guide-to-Importing-Donor-Data) for more information.

My NPSP installation failed with this error “Unmanaged custom object tab already exists.”

This is a common error that is easily fixed. From Setup, enter **Tabs** in the Quick Find box, then select **Tabs** under the Create menu. Look for the name of the tab mentioned in the error message. Click **Del** next to the tab name. Note that this only removes the tab, but not the related data. Then run the installer again.

My NPSP installation failed with this error “Opportunity Record Types - pick list value, prospecting not found.”

You are missing one or more of the default opportunity stages. You can fix this issue by creating them and re-running the installer. From Setup, enter **Opportunities** in the Quick Find box, then select **Fields** under the Opportunities menu. Click on **Stage** in the Opportunity Standard Fields section. You should have the following opportunity stages:

- Prospecting
- Qualification
- Needs Analysis
- Value Proposition
- Id. Decision Makers

- Perception Analysis
- Proposal/Price Quote
- Negotiation/Review
- Closed Won
- Closed Lost



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