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NPSP: Households Interface

This article shows you how to use and work with the Households interface. (Note, please see the article on installing version 2.4 to configure the new interface.)

Accessing the New Interface

The screenshot displays the 'Sample Household' detail page in the NPSP interface. The page is divided into several sections:

- Household Detail:** Includes fields for Household Name, Address, City, State/Province, Postal Code, and Country. It also shows the Owner, Primary Contact, and Household Phone.
- Donation Information:** A table showing donation history with columns for Date, Amount, and Status. It includes a 'Donation Totals' section with summary statistics.
- Household Members:** A table listing household members with columns for Name, Account Name, and Phone.

The interface is designed to provide a comprehensive view of a household's information and donation activity.

The interface is accessible on either 'Edit', or the creation of a new Household (assuming you've configured the page per the installation instructions, or received it out-of-the-box). On viewing a Household, the standard Salesforce detail record page will be used.

Understanding the Interface



There are several areas you can interact with in the new Households interface

1. Use drag and drop to reorder the members of your Household. The order affects the naming conventions in the Household Name, Formal Greeting and Information Greeting section. You can also exclude Contacts from the automatic naming altogether from this area.
2. Manipulate the Household address, select a new address from a Contact to use as the Household address, enter a new Household address from scratch, and set the Mailing Address of all Household members to the Household address using this area
3. Add members, with the option to merge or delete their existing Household information
4. Control Household naming and greetings, with the ability to override or re-instate automatic naming
5. Edit fields accessible from the standard page layout
6. **All actions require you to click the 'Save' button to save the information to the Household record**

Adding Contacts to a Household



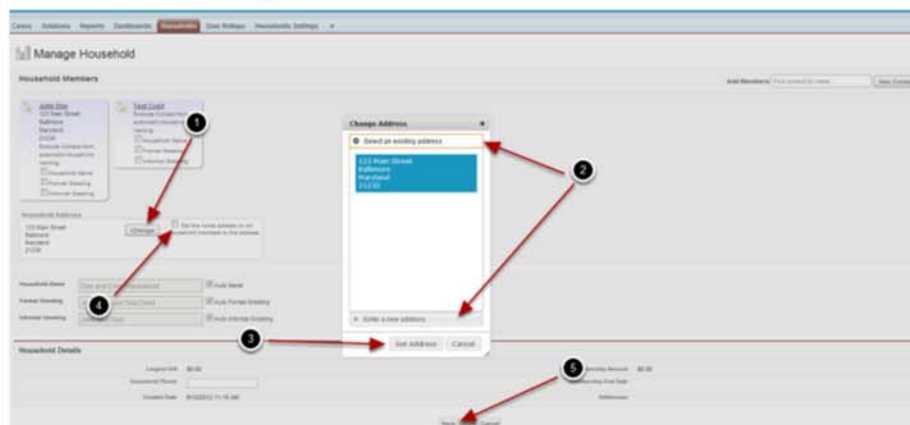
New members can be added to a Household by either merging existing members in, or creating new Contacts.

To merge existing members in:

1. Type the Member's name in the 'Add Members', the drop down menu will show you matching Contact values
2. Click 'Add' next to the Contact you wish to add
3. Decide if you wish to merge the entire member's Household in, or simply remove the member 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'

5. To create a new Contact, click the 'New Contact' button, and then 'Save' after entering the Contact's name on the new card.

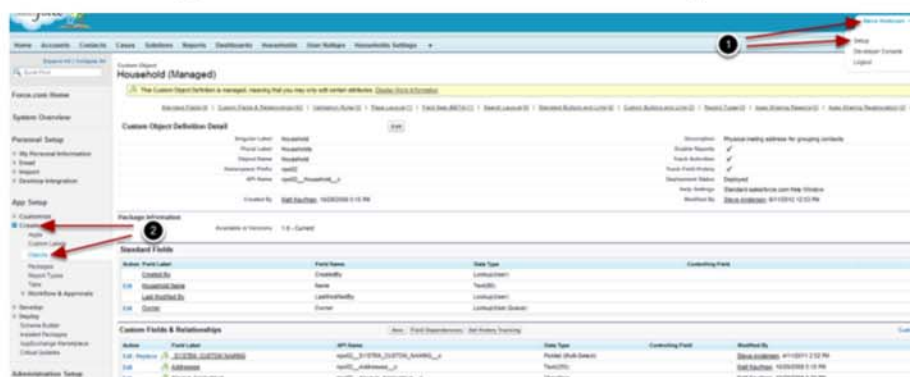
Changing Addresses



Addresses can be changed using the 'Change' button next to the 'Household Address' menu.

1. Click 'Change'
2. Select an existing address, or enter a new address by clicking on the menu
3. Click 'Set Address'
4. Optionally set other Contact's in the Household to this same address
5. Click 'Save'

Editing the Interface Layout - Step 1

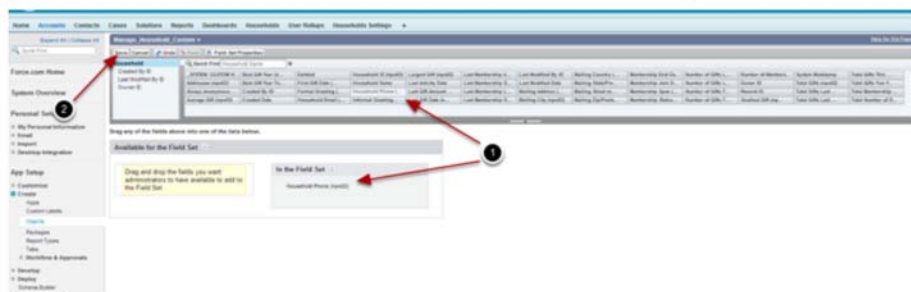


You can change the fields that appear in the 'Household Layout' section of the interface. To do so, you'll need to edit the 'Field Set'.

1. Your Name, Setup
2. Create, Objects

Click on 'Household'

Editing the Interface Layout - Step 2



Under the 'Field Sets' section, click 'Edit' next to 'Manage_Household_Custom'

1. Drag fields from the field menu down into the 'In the Field Set' section
2. Click 'Save' when complete



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