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NPSP: Household Naming

For versions 2.2 and above of the Households package, automatic Household naming is now available. This article walks through the various features and functionality, and how to enable Household naming in a recently upgraded org.

Activating Household Naming - Upgrading Only

Exclude from Contact Rollups

from Contact Rollups

Existing Cust
Existing Cust
Existing Cust
New Custome

Household Name Settings

Clicking this button will activate advanced household naming, and populate your existing formal greeting, informal greeting and household name fields with new names. THIS IS AN IRREVERSIBLE PROCESS. While you can deactivate household naming, the newly populated names will remain. Toggling on, off, then on again may have unpredictable results. DISABLE ALL CUSTOM VALIDATION RULES ON HOUSEHOLDS BEFORE ACTIVATING. Once complete (100%), you may safely leave or refresh the page.

Activate Advanced Household Naming

Opportunity Membership Settings

If your organization is upgrading to Households version 2.2 from a previous version, you'll need to activate advanced household naming before the functionality will be available. This process does three main things:

1. Looks at all existing Household records. If any have names that are customized*, those Household names will be marked as custom in the system so they will not be overwritten.
2. Changes existing Household Names to take into account the last names of all Household members[0]
3. Populates values for the Informal and Formal Greeting for each Household.

Activating Household Naming is an IRREVERSIBLE PROCESS, you cannot undo the changes to the Household names. After disabling any custom validation on the Household object, click 'Activate Advanced Household Naming'

* NOT in the standard <Lastname> Household format (changes to the custom label value - including translations are respected)

Household Naming Fields

Household Detail		Edit	Delete	Clone	Copy H
▼ Household Information					
Household Name	Andersen and Bromer Household				
Formal Greeting	Mr. Kevin Bromer and Mr. Steve Andersen				
Informal Greeting	Kevin and Steve				

Advanced Household Naming consists of four new fields, three fields designed to be displayed on the page layout, and a system field. The new fields introduced by Advanced Household Naming are:

1. Household - Formal Greeting - A combination of all non-excluded contacts' full salutation, first name, and last name
2. Household - Informal Greeting - A combination of all non-excluded contacts' first names.
3. Household - _SYSTEM: Custom Naming - A system field, should NOT be displayed on layouts. This field helps determine if a user customization is in place for a particular field.
4. Contact - Naming Exclusions - A multi-select picklist with the three field above as values. This allows you to exclude the contact from the naming conventions for the Household, Formal Greeting or Informal Greeting, or any combination thereof. These values should not be changed, edited, or translated.

Contact Changes

Household Detail		Edit	Delete	Clone	Cop
▼ Household Information					
Household Name	Andersen and Bromer Household				
Formal Greeting	Mr. Kevin Bromer and Dr. Art Andersen				
Informal Greeting	Kevin and Art				

Changing the first name, last name, salutation or naming exclusion for an individual contact will automatically cause the Household names to be updated.

Excluding a Contact - 1

Naming Exclusions

Available	Chosen
Household__c.Formal_Greeting__c	Household__c.Name
	Household__c.Informal_Greeting__c

OK Cancel

Contact Owner: Kevin Bromer (Change)

Name: Dr. Art Andersen

Account Name: Art Andersen

Household: Andersen and Bromer Household

You can exclude a Contact record from any part of the Household name by selecting the values in the Naming Exclusion picklist on the Contact record.

Excluding a Contact - 2

Household Detail		Edit	Delete	Clone	Copy
Household Information					
Household Name	Bromer Household				
Formal Greeting	Mr. Kevin Bromer and Dr. Art Andersen				
Informal Greeting	Kevin				

The Household record will automatically be updated when you save the Contact with the exclusions. Here, we've excluded Art from the Household Name and the Household Informal Greeting fields.

Custom Names

Household Detail		Edit	Delete	Clone	Copy
Household Information					
Household Name	The Coolest House Ever				
Formal Greeting	Mr. Kevin Bromer and Dr. Art Andersen				
Informal Greeting	All you cool people...				

Advanced Household Naming will respect your custom names as well. If you enter a custom name for the Household Name, Formal Greeting or Information Greeting field, that field will no longer be updated by the system.

Returning to System Naming - 1

Household Detail		Save	Cancel
Household Information			
Household Name	REPLACE 		
Formal Greeting	Mr. Kevin Bromer and Dr. Art Andersen		
Informal Greeting	Deleted 		

If you later decide you'd like to return to system-generated names, you can use the custom naming keyword to signal to the system you want to return to the system naming convention. By default, this keyword is REPLACE, however, this may be changed (see below). For Formal Greetings and Informal Greetings, deleting the name entirely has the same effect.

Returning to System Naming - 2

Household Detail
[Edit](#) [Delete](#) [Clone](#) [Copy](#)
Household Information

Household Name	Bromer Household
Formal Greeting	Mr. Kevin Bromer and Dr. Art Andersen
Informal Greeting	Kevin

Note that the naming exclusions from the Contact record are still respected after returning to the system names.

Substituting Naming Custom Labels

New Custom Label				
Action	Name	Categories	Short Description	Value
1	DefaultHouseholdName	Households, Household Naming	DefaultHouseholdName	Household
2	HouseholdAnonymousGreeting	Households, Household Naming	HouseholdAnonymousGreeting	Sir or Madam
3	HouseholdAnonymousName	Households, Household Naming	HouseholdAnonymousName	Anonymous
4	HouseholdNameConnector	Households, Household Naming	HouseholdNameConnector	and
5	HouseholdNameOverrun	Households, Household Naming	HouseholdNameOverrun	friends

You can customize some aspects of your naming through the use of Custom Labels (Setup->Create->Custom Labels). The following fields are editable:

1. **DefaultHouseholdName** - The name that is appended to the end of the Household Name. (*Bromer Household*)
2. **HouseholdAnonymousGreeting** - If there are no valid contacts for a Household greeting (all have been excluded, or no first names), this value will be used instead.
3. **HouseholdAnonymousName** - If there are no valid contacts for a Household Name (all have been excluded), this value will be used instead.
4. **HouseholdNameConnector** - The junction word between multiple names. (*Bromer **and** Andersen Household*)
5. **HouseholdNameOverrun** - When more than 10 different contacts are included in a Household, the system will shorten the name with 'and friends'.

To edit these labels, you'll need to use the Translation Workbench. Please see the 'How to Edit Custom Labels' Lesson for more information.



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