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NPSP: Installing Households v2.4

This article provides brief instructions on updating to Households version 2.4 from a previous version.

Confirm Package Details

Package Installation Details

Package Name	Households
Version Number	2.4
Version Number	2.4 (Beta 3)
Publisher	Enterprise.com Foundation
Description	

[Continue](#) [Cancel](#)

Package Components

▼ Objects (4)

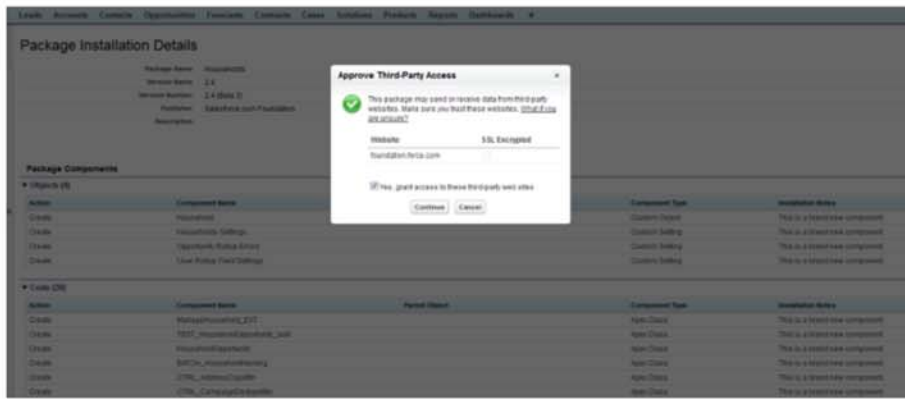
Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Household		Custom Object	This is a brand new component.
Create	Household Settings		Custom Setting	This is a brand new component.
Create	Opportunity Rollover Errors		Custom Setting	This is a brand new component.
Create	User Rollover Field Settings		Custom Setting	This is a brand new component.

▼ Code (8)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	ManageHousehold_EXT		Apex Class	This is a brand new component.
Create	TEST_HouseholdOpportunityRoll		Apex Class	This is a brand new component.
Create	HouseholdOpportunity		Apex Class	This is a brand new component.
Create	BATCH_HouseholdRolling		Apex Class	This is a brand new component.
Create	CRM_AddressCouples		Apex Class	This is a brand new component.

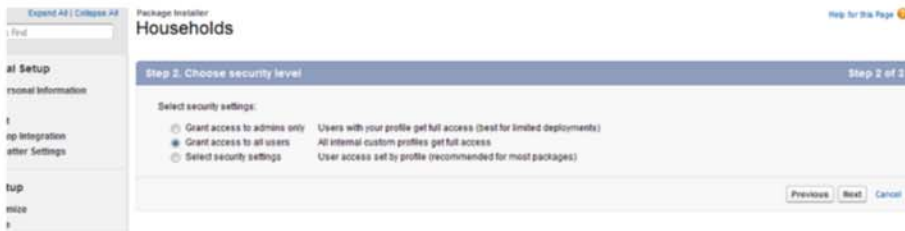
A link to the most recent version of Households can be found here (<http://foundation.force.com/packages/households>). After clicking through the link, you'll need to confirm your upgrade details. Click 'Continue' once confirmed.

Enable Remote Site Settings



During the installation, you'll be asked to confirm remote access for Foundation.force.com. This is used for the new package update availability utility and does not transfer any user data to the Foundation, nor does it allow the Foundation to access your data. Check the 'Yes, grant access to these third-party web sites' and click 'Continue'.

Grant Access to all Users



Select 'Grant access to all users' (or configure independent security settings if desired), and click 'Next'.

Confirm Installation

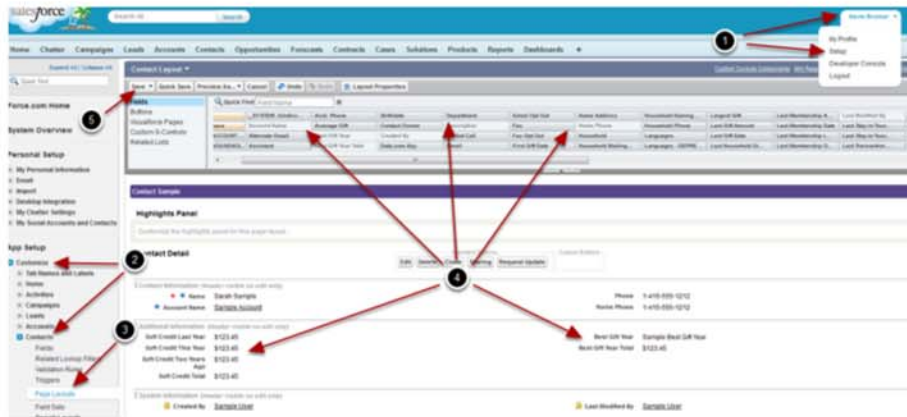


Temporarily disable any workflow or custom validation rules that have been added to your Nonprofit Starter Pack. Alternately, you may attempt to install with those rules enabled by clicking 'Ignore Apex test failures that may cause the installed application not to function properly.' If you do ignore test failures, you'll want to test the package manually after installation. Click 'Install' to continue. The package may take some time to install, and you'll be notified via email or in your browser when the installation is complete.

Contact record based on their Opportunity Contact role.

1. If desired, Enable Soft Credit Rollovers
2. Select the Opportunity Contact Role or Roles to use as the Soft Credit Rollover.

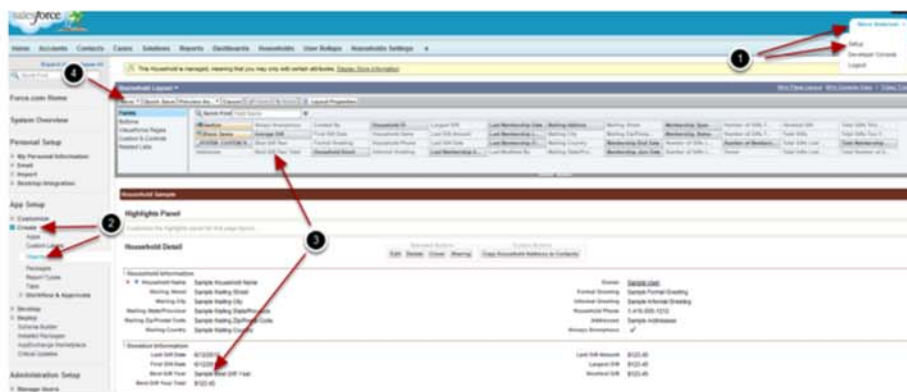
Edit Contact Layout



Version 2.4 introduces several new fields. You can edit your Contact layouts to include those fields. To do so, go to:

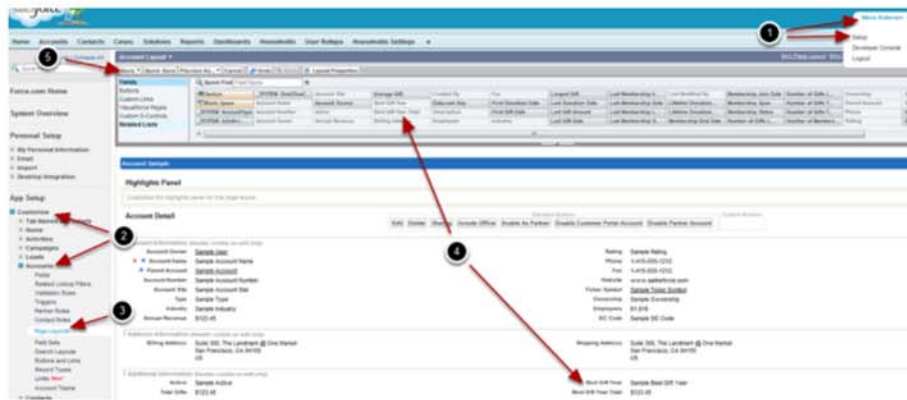
1. Your Name, Setup
2. Customize, Contacts
3. Click on 'Page Layouts' and then 'Edit' next the layout you wish to edit
4. Drag the field from the list of available fields into the position on the layout you wish to see them. The six new Contact fields are:
 - Soft Credit Last Year
 - Soft Credit This Year
 - Soft Credit Two Years Ago
 - Soft Credit Total
 - Best Gift Year
 - Best Gift Year Total
5. Click 'Save'

Edit Households Layout



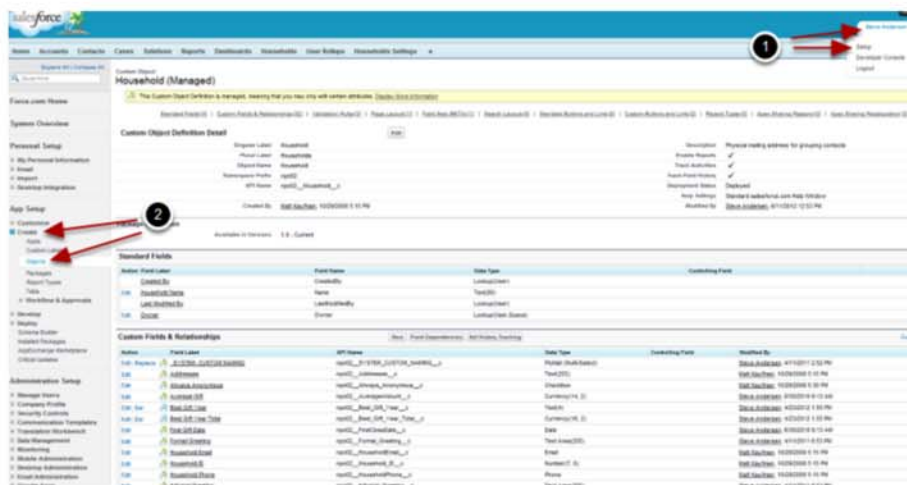
1. Click on Your Name, Setup
2. Create, Objects
- (not shown). Click on 'Households', then under 'Page Layouts', select 'Edit' next to the layout you wish to edit
3. Drag the two new fields onto the page layout (Best Gift Year, Best Gift Year Total)
4. Click 'Save'

Edit Account Layout



1. Your Name, Setup
2. Customize, Accounts
3. Click on 'Page Layouts' and then 'Edit' next the layout you wish to edit
4. Drag the two new fields onto the page layouts (Best Gift Year, Best Gift Year Total)
5. Click 'Save'

Add New Households Interface - Step 1



1. Your Name, Setup
2. Create, Objects
(not shown). Click on 'Households'
- (not shown). Under the 'Standard Buttons and Links' section. click 'Edit' next to 'Edit'

Add New Households Interface - Step 2

Override: Standard Button or Link

Edit

Overriding standard buttons and links changes the meaning of the salesforce.com URL and any calls to that URL, such as a salesforce.com page, a browser shortcut, c
Select the custom s-control or Visualforce Page to use in place of the salesforce.com URL for this standard button or link.

1. Select 'Visualforce Page'
2. Select 'Manage Household'
3. Click 'Save'

Repeat steps if desired for the 'New' button as well.



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