

NPSP: Add and Manage Organization Accounts

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Organization Account Overview

Organization Accounts allow your nonprofit to keep track of entities that are not individual constituents or households. These entities might be foundations that fund your work, other nonprofits that you partner with, corporations that sponsor your work, or companies that employ your donors and constituents. Organization Accounts can help you better track the companies and foundations that you and your constituents interact with.

The Nonprofit Success Pack allows you to create and manage organization accounts, as well as the affiliations that your contacts have with those organizations.


Create or Modify an Organization Account

Before you can start keeping track of your contacts' organizational affiliations, you need to create the Organization Account records.

Create an Organization Account


1. In Salesforce, navigate to the Accounts tab.
2. Click **New**.

3. Select Organization from the Record Type picklist and click **Continue**.

 **New Account**
Select Account Record Type

Select a record type for the new account. To skip this page in the future, change your record type settings on y

Select Account Record Type

Record Type of new record | Organization ▼ 

Continue **Cancel**

Available Account Record Types

Record Type Name	Description
Household Account	An Account representing a Household containing one or more individuals
Organization	An Account representing an organization

4. Enter the Organization Name and other details.
5. Click **Save**.

Modify an Organization Account

1. Navigate to the Organization Account record you would like to update.
2. Click **Edit** at the top of the screen.
3. Change the Organization as needed and click **Save** when you're finished.

Create or Modify Affiliations

After you've created an Organization Account, you can create Affiliations to connect your Contact records to the Organization. An Affiliation is actually an independent, custom Salesforce object that links Contacts with Organizations. Affiliations can represent current or past connections between your Contacts and Organizations—much like Relationships (the key difference being that Relationships in the NPSP are for Contact-Contact connections, and Affiliations are for Contact-Organization connections).

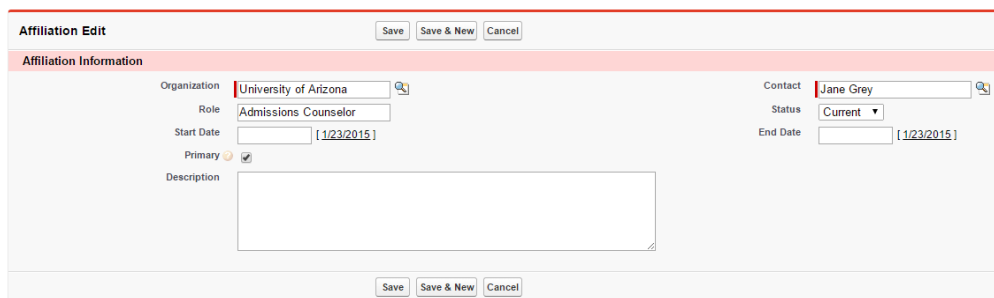
The NPSP allows you to mark one Affiliation for each Contact as the Contact's **Primary Affiliation**. This is typically used for representing the employer/employee connection between an Organization Account and Contact, but could also be used to represent another Affiliation that is more important for your organization's purposes, such as a donor being a board member for a specific foundation.

! IMPORTANT : You should carefully consider which affiliations are important for your organization to

track. If you create a new Affiliation for a Contact and mark it Primary, Salesforce will automatically uncheck the Primary option on the Contact's previous Primary Affiliation record, and switch the Contact's previous Primary Affiliation status from Current to Former. **A Contact can only have one associated Primary Affiliation record at any given time, though a single Organization Account may be designated as the Primary Affiliation for multiple Contacts.**

Create an Affiliation

1. Navigate to the Contact or Organization Account where you would like to add the Affiliation.
2. Scroll down to the **Organization Affiliations** related list (on the Contact) or the **Affiliated Contacts** related list (on the Organization Account).
NOTE: *If you do not see one of these related lists, you may need to add them to your page layouts for Contacts and Organization Accounts.*
3. Click **New Affiliation**. This will create a new Affiliation record that lets you link a Contact to an Organization.
4. Populate the Organization and Contact fields (these are required), as well as any other information you have for the Affiliation.



5. Check the Primary box if you want this Organization to appear in the Primary Affiliation field on the Contact's record. Remember, if you set this Affiliation to Primary and there is already another Primary Affiliation for that Contact, Salesforce will switch the pre-existing Primary Affiliation status to Former, and uncheck the Primary option for that Contact. The Primary Affiliation field on the Contact record always contains the Organization whose Affiliation record is marked Primary for that Contact.
6. Click **Save**.

The Affiliation record will now appear in the Organization Affiliations related list on the Contact record, and the Affiliated Contacts list on the Organization record. If you marked the Affiliation Primary, the Organization name will also appear in the Primary Affiliation field on the Contact record.

Contact Detail

▼ Contact Details

Name	Ms. Jane Grey
Account Name	Grey Household
Primary Affiliation	University of Arizona

Modify an Affiliation

1. Navigate to the Contact or Organization Account that lists the Affiliation you want to modify.
2. Scroll down to the **Organization Affiliations** related list (on the Contact) or the Affiliated Contacts related list (on the Organization Account).
NOTE: *If you do not see one of these related lists, you may need to add them to your page layouts for Contacts and Organization Accounts.*
3. Click **Edit** in the Action column for the Affiliation you want to modify.
4. Make any necessary changes to the Affiliation and click **Save**.

If your edits included unchecking the Primary box or changing a Primary Affiliation's status to Former, the Organization name will be removed from the Contact's Primary Affiliation field.

Organizational Affiliations versus Account Contact Roles

In your Salesforce database, you may come across something called an Account Contact Role. An Account Contact Role is a very simple way of connecting a Contact to an Account. For example, you might assign a Contact a "Decision Maker" Contact Role to show that the individual is responsible for making decisions within the organization. You may also see the Contact Role listed under **Setup | Customize | Account**, or as a related list on one of your Account or Contact page layouts. **Do not confuse Account Contact Roles with Affiliations.** While the two objects share some basic similarities, the Affiliation is a much more robust way to connect your Contacts to your Accounts.

The Account Contact Role is a native Salesforce junction object with very limited features. It gives the ability to create many-to-many relationships between Contacts and Accounts, but unlike Affiliations, you cannot track start and end dates, status, or any other custom fields. Account Contact Roles are limited to just listing the Account and Contact, along with a **Role** picklist (which is customizable). There is no automation on Account Contact Roles for managing an individual's primary Account Contact Role. Furthermore, the inability to add custom fields or track additional data about the Account-Contact connection severely limits the utility of Account Contact Roles—especially compared to the additional fields and features of the Affiliations object.

To prevent anyone at your organization from accidentally using Account Contact Roles instead of Affiliations, remove the Account Contact Role related list from any Account or Contact page layouts where it appears.

Organization Account Best Practices

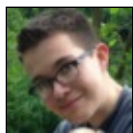
Don't create Contacts directly from Organization Accounts

If you are using Household Accounts (or 1-to-1 Accounts), the best practice is for you to associate every Contact in your Salesforce database with a Household Account (or 1-to-1 Account), and then for you to connect those Contacts to their Organization(s) via Affiliations. The Primary Affiliation will allow you to track the main affiliation for each Contact—typically representing an employer/employee connection.

It may help to remove the standard Contacts related list from your Organization Account layout, to ensure that Contacts are never entered directly using the Organization Account as their Account. This will help ensure that all Contacts are created with a Household Account, and can later be connected to Organization Accounts via Affiliations.

Use Affiliations to track a Contact's history of Organizational connections

Affiliations are also preferable for connecting Contacts to Organization Accounts because they allow you to track a Contact's current and former Affiliations, which in turn shows you how your constituents connect to multiple organizations over time (as they move on to new jobs or join boards at different organizations, for example). The Affiliation records for a Contact will show you all of the Organizations with which that Contact was or is involved.



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