

NPSP: Customize Household Names

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Overview: About Household Naming

Nonprofit Success Pack 3.0 and later supports the Household Account model and something we call “automatic Household naming.” What that essentially means is that when you create a new Contact in Salesforce, the NPSP creates a new Household Account record for you, and “automatically” names the new Household Account according to the name of the new Contact. For example, when you create the Thomas Jefferson Contact record, the Nonprofit Success Pack creates the Jefferson Household for you at the same time.

NOTE: *NPSP 3.0 and later also supports automatic Household naming if you are using the One-to-One or Individual “Bucket” Account models with the older (separate) Household object. The behaviors described in this article are exactly the same for either of those scenarios.*

By default, the NPSP does a number of things for you around automatic Household naming. The NPSP:

- Creates the name of a new Household based on the last name of a new Contact.
- Creates formal and informal greetings when you add more Contacts.
- Updates Household names and greetings when you update Contact information.

The best place to see this in action is in the Account Detail section of the Household Account record:

Account Detail		Edit	Delete	Manage Household
Account Name	Jefferson Household [View Hierarchy]	Household Phone		
Primary Contact	Thomas Jefferson	Phone		
Formal Greeting	Thomas and Martha Jefferson	Number of Household Members	2	
Informal Greeting	Thomas and Martha			

In the above example, the NPSP is displaying the default naming conventions for two Contacts in the same Household: **Thomas Jefferson** and **Martha Jefferson**. But what if you wanted your Formal Greeting to be Mr. and Mrs. Jefferson? Or Mr. Thomas Jefferson and Mrs. Martha Jefferson? Or what if you wanted to remove a Contact from the Informal Greeting altogether?

The rest of this article describes how you can customize automatic Household naming according to your liking.

Customize the Household Name Format

The **Household Name Format** is the format that the NPSP uses to determine the Household Account Name (Household Account model) or the Household Name (One-to-One or Individual “Bucket” account models). The Nonprofit Success Pack gives you many different options beyond the default option of {Last Name} Household.

1. In NPSP Settings, click **People | Households**.
2. Click the **Edit** button at the top of the page.
3. From the Household Name Format pop-up menu, select the format that appeals to you. Here are the available options:
 - **-none-** Does not generate a Household Name, leaving it up to the user to assign one.
 - **{!LastName} Household** Generates a Household name such as “Smith Household” or “Smith and Jones Household,” depending on the number of Contacts in the Household.
 - **{!FirstName} {!LastName} Household** Generates a Household name such as “John Smith Household” or “John and Jane Smith Household”.
 - **{!LastName} (!FirstName) Household** Generates a Household name such as “Smith (John) Household”, “Smith (John and Jane) Household” or “Smith (John) and Doe (Jane) Household”.
 - **{!LastName} Family** Generates a Household name such as “Smith Family” or “Smith and Jones Family”.
 - **{!FirstName} {!LastName} Family** Generates a Household name such as “John Smith Family” or “John and Jane Smith Family”.
 - **{!LastName} (!FirstName) Family** Generates a household name such as “Smith (John) Family”, “Smith (John and Jane) Family” or “Smith (John) and Doe (Jane) Family”.

- You can also select **other** and specify your own naming convention.

As you make different selections, a preview box farther down the page shows you what the Household Name will look like.

Examples for Household Name Format

Smith (Sam) Household

Smith (Sam and Sally) Household

Smith (Sam, Sally and Suzie) Household

Smith (Sam, Sally and Suzie) and Doe (Daphne) Household

Smith (Sam, Sally and Suzie) and Doe (Daphne and Donald) Household

Note too that the Household Name convention also depends on other factors, such as how many Contacts might be part of the Household, how many of those Contacts you might want listed, the order of Contacts, and so on. More on all that below.

4. When you're finished, click **Save**.

Customize the Formal Greeting Format

The **Formal Greeting Format** is the format that the NPSP uses to determine how a Household's formal greeting appears. The Nonprofit Success Pack gives you many different options beyond the default option.

1. In NPSP Settings, click **People | Households**.
2. Click the **Edit** button at the top of the page.
3. From the Formal Greeting Format pop-up menu, select the format that appeals to you. Here are the available options:
 - **-none-** Does not generate a Formal Name at all. The field will remain blank.
 - **{!{FirstName}} {!LastName}** Generates a formal greeting such as "John Smith" or "John and Jane Smith".
 - **{!{Salutation}} {!FirstName}} {!LastName}** Generates a formal greeting such as "Dr. John Smith", or "Dr. John and Mrs. Jane Smith".
 - You can also select **other** and specify your own naming convention.

As you make different selections, a preview box farther down the page shows you what the Formal Greeting will look like.

Note too that the Formal Greeting convention also depends on other factors, such as how many Contacts

might be part of the Household, how many of those Contacts you might want listed, the order of Contacts, and so on. More on all that below.

4. When you're finished, click **Save**.

Customize the Informal Greeting Format

The **Informal Greeting Format** is the format that the NPSP uses to determine how a Household's informal greeting appears. The Nonprofit Success Pack gives you many different options beyond the default option.

1. In NPSP Settings, click **People | Households**.
2. Click the **Edit** button at the top of the page.
3. From the Informal Greeting Format pop-up menu, select the format that appeals to you. Here are the available options:
 - **-none-** Does not generate an Informal Name at all. The field will remain blank.
 - **{!{!FirstName}}** Generates an informal name such as "John" or "John and Jane".
 - **{!{!FirstName}} {!LastName}** Generates an informal name such as "John Smith" or "John and Jane Smith".
 - You can also select **other** and specify your own naming convention.

As you make different selections, a preview box farther down the page shows you what the Informal Greeting will look like.

Note too that the Informal Greeting convention also depends on other factors, such as how many Contacts might be part of the Household, how many of those Contacts you might want listed, the order of Contacts, and so on. More on all that below.

4. When you're finished, click **Save**.

Customize Name Connector, Name Overrun, and Name Sequence

The name connector, name overrun, and name sequence also affect the appearance of your Household names and greetings.

1. In NPSP Settings, click **People | Households**.
2. Click the **Edit** button at the top of the page.
3. Use the appropriate editable fields to customize the name connector, name overrun, or name sequence. See below for specific instructions.
4. When you're finished, click **Save**.

Customize the Name Connector

- The **Name Connector** joins multiple contacts together in the Name, Formal Name, or Informal Name fields.
- The default value is “and”, however you can override that value with any value, such as “&” or “y”. (There are no restrictions as to the value.)

Customize the Name Overrun

- The **Name Overrun** value is a text value that replaces a long list of names in a Household Name, Formal Greeting, or Informal Greeting. The **Contact Overrun Count** is the number that indicates the maximum number of names you want to show.
- For example, you might have nine members of a Household, but you certainly wouldn’t want to list out all of their names in the Household name or a greetings. By setting the Contact Overrun Count to 2, and the Name Overrun value to “Other Family Members,” your Household Name Format would look as follows:

Examples for Household Name Format

Sam Smith Family

Sam and Sally Smith Family

Sam, Sally Smith and Other Family Members Family

Sam, Sally Smith and Other Family Members Family

Sam, Sally Smith and Other Family Members Family

Name Overrun

Other Family Members

Specifies the text Salesforce uses to replace longer lists of names.

Contact Overrun Count

2

The number of Contacts Salesforce will explicitly name in Household names and greetings. After this number, Salesforce substitutes the Name Overrun value for names.

Customize the Name Sequence

You can change the order of Contact names in Household Names, Formal Greetings, and Informal Greetings.

1. Navigate to the Household Account or Household object record whose Contact names you want to re-order.

2. Click **Manage Household**.

NOTE: If you don't see the **Manage Household** button, you likely have an earlier version of NPSP, and might need to enable the button in Salesforce setup (</articles/Resource/NPSP-Enable-the-Manage-Household-Button>).

3. On the Manage Household page, drag the Contact cards from left to right to re-order them.

NOTE: If you don't see the Manage Household page, you likely upgraded to NPSP 3.0 or later from a previous version. Consult this post-upgrade checklist (</articles/Resource/NPSP-Post-Upgrade-Checklist>) for more information.

4. Click **Save**.

Exclude a Name

You can exclude Contact names from Household Names, Formal Greetings, and Informal Greetings.

1. Navigate to the Household Account or Household object record whose Contact you want to exclude from a Household Name or greeting.

2. Click **Manage Household**.

NOTE: If you don't see the **Manage Household** button, you likely have an earlier version of the NPSP, and might need to enable the button in Salesforce setup (</articles/Resource/NPSP-Enable-the-Manage-Household-Button>).

3. On the Manage Household page, choose your exclusions from the Contact cards.

Household Members

Contact Name	Exclude Contact from automatic Household naming:
Thomas Jefferson	<input type="checkbox"/> Household Name <input checked="" type="checkbox"/> Formal Greeting <input checked="" type="checkbox"/> Informal Greeting
Martha Jefferson	<input type="checkbox"/> Household Name <input type="checkbox"/> Formal Greeting <input type="checkbox"/> Informal Greeting

NOTE: If you don't see the Manage Household page, you likely upgraded to NPSP 3.0 or later from a previous version. Consult this post-upgrade checklist (</articles/Resource/NPSP-Post-Upgrade-Checklist>) for more information.

4. Click **Save**.

Refresh All Household Names

Once you've made changes to Household Name formatting, you can refresh the naming for all existing Household names and greetings. **However, name refreshing is an irreversible process, and should not be done without careful consideration.**

TIP: Before running this process, create a backup of your data by exporting a full report of all Household Accounts or Household object records that contain these four fields: ID, Name, Formal Greeting, Informal Greeting.

1. In NPSP Settings, click **People | Households**, and then click **Edit**.
2. Scroll down the page and **carefully review the WARNING section before refreshing Household names.**
3. If you haven't already, disable all custom validation rules. (See below for more information.)
4. Click the Refresh All Household Names button to start the process.

Disabling Custom Validation Rules.

Custom validation rules can prevent the automatic Household naming process from properly completing. You should disable all custom validation rules on the Account object (Household Account model) or on the Household object (One-to-One and Individual "Bucket" models) before you begin the refresh process. Once the refresh process is complete, you can re-enable your custom validation rules.

1. Click Setup at the top of Salesforce to open Salesforce Settings.
2. Disable custom validation rules in one of the following places:
 - **Customize | Accounts | Validation Rules** (Household Account model)
 - **Create | Objects | Households** (One-to-One or Individual models)

Disable Automatic Household Naming

If you don't want the NPSP to name your Households automatically for you, you can disable the automatic Household Naming feature.

1. In NPSP Settings, click **People | Households**.
2. Click the **Edit** button at the top of the page.
3. Deselect the Automatic Household Naming checkbox and click **Save**.

Household Naming FAQ

- What happens if I manually edit the Household Name or the Formal/Informal Greetings?
- How do I reset one of the 3 Name fields back to automatic naming?
- How do I build my own naming format?
- How do I include custom fields in the Household Name?
- How do I prevent validation rules from blocking changes to the Household Name fields?

What happens if I manually edit the Household Name or the Formal/Informal Greetings?

Salesforce will detect that you have manually overridden one of these three fields on the Household Account or (older) Household object, and will exclude that field from future naming.

How do I reset one of the 3 Name fields back to automatic naming?

Use the custom naming keyword to tell Salesforce that you want to return to the automatic naming convention. By default, this keyword is REPLACE, however, you can change this by modifying the “NameReplacementText” Custom Label value (**Setup | Create | Custom Labels**). For Formal Greetings and Informal Greetings, deleting the name entirely has the same effect.

You can also edit the Household Account or (older) Household object. Doing so opens the Manage Household page, which lets you make appropriate selections for automatic naming.

How do I build my own naming format?

Use the following guidelines:

- Use {!fieldname}, where fieldname is the full developer name of a field on a Contact record. The field name must be of type Text, TextArea, or Picklist.
- Surround the part of the name spec that holds the fields that are not part of the Lastname with an additional {! }. For example:

```
{!{!Salutation} } {!Firstname} } {!Lastname}
```

This tells Salesforce which fields to use from Contacts that have the same Lastname.

How do I include custom fields in the Household Name?

You can include any custom or standard Contact field in the custom naming formats. You need to format the field as {!fieldname}. For example:


```
{!LastName} {!Name_Suffix__c}, {!FirstName}}
```

Field names are case-insensitive.

How do I prevent validation rules from blocking changes to the Household Name fields?

If your organization has custom validation rules that prevent saving records with missing or invalid data, those rules could block automatic Household Naming. To prevent this from happening, add this logic to the validation rules:

```
&& NOT (OR (ISCHANGED (Name), ISCHANGED (np02_Formal_Greeting__c),  
ISCHANGED (np02_Informal_Greeting__c)))
```

Adding the above conditions to your Account or Household validation rules forces those validation rules to ignore any modifications you make to Name, Informal_Greeting__c or Formal_Greeting__c.



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