

NPSP: Merge or Split Households

This article contains these topics:

- Merge Households
- Split a Household

NOTE: *These steps will work with any Nonprofit Success Pack account model. For more information on the data model options, see [What is an Account Model?](/articles/Resource/NPSP-What-is-an-Account-Model?popup=false&navBack=H4sIAAAAAAAAAAAluuVipWslLyzssvz0INSU_1yM9NVdJRygaKFSSmp4ZkluSA-KVAvn58aaZ-NkyhPpCDqqs2FgCHRwp0TQAAAA) (/articles/Resource/NPSP-What-is-an-Account-Model?popup=false&navBack=H4sIAAAAAAAAAAAluuVipWslLyzssvz0INSU_1yM9NVdJRygaKFSSmp4ZkluSA-KVAvn58aaZ-NkyhPpCDqqs2FgCHRwp0TQAAAA)*

Merge Households

Have you ever found yourself with two different Household Account records, both of which have the same mailing address? This often occurs during an online form integration where two of your Contacts registered with your organization separately. It can also occur as a result of a data import issue.

In addition to the above scenario, you might find that two of your Contacts, who weren't living together previously, are now living together.

Luckily, the Nonprofit Success Pack lets you easily merge Household Account records together without losing any data.

1. In the Nonprofit Success Pack, search for the Contact that you would like to be the Primary Contact on the final, merged Household. You can do this by typing the Contact's name in the search box at the top of Salesforce, or you can click the Contact tab and select from the list of recent contacts.

NOTE: *If you're not in the Nonprofit Success Pack application, you'll need to select it from the upper-right hand corner in Salesforce.*



2. Once you're on the Contact record, click the Household Name. If you're using the Household Account model in NPSP version 3.0 or later, the Household Name is the Account Name:

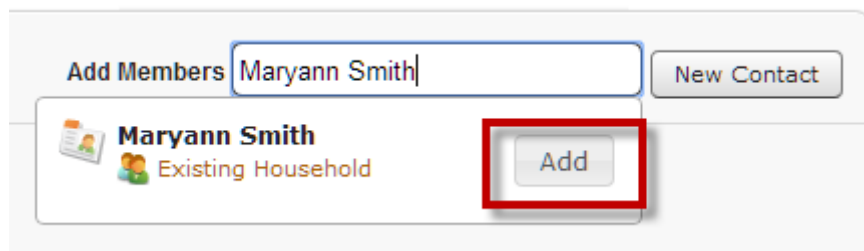
▼ Contact Details

Name Jimmy Smith

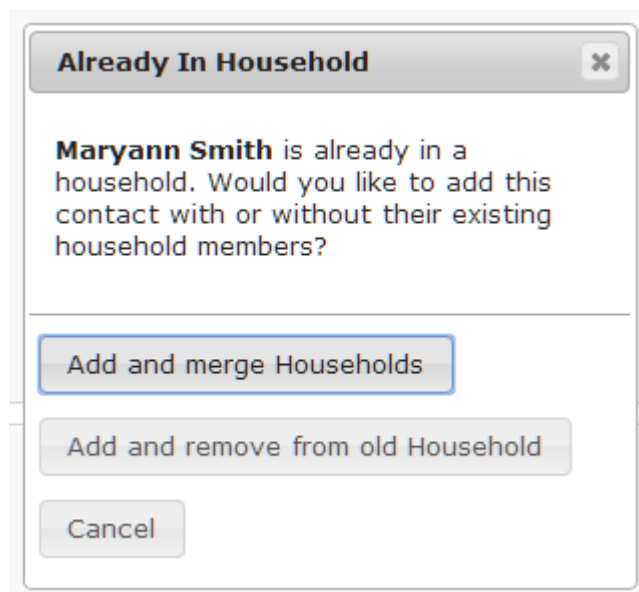
Account Name **Smith Household**

If you're using a previous Account Model (1-to-1 or Individual "Bucket" model), the Household is linked in the Household field.

3. On the Household record, click the Edit button.
4. In the upper-right hand corner of the Manage Household page, type the name of the other Contact that you want to add to this Household. Give it a moment to find the right record, and then click Add.



5. Salesforce then presents you with options on what to do with the Contact's Household. Click the one that does what you want to do.



Add and merge Households: This option adds the Contact to the current Household, combines fields from the old Household with the current one, and deletes the old Household. If there are other members in that old Household, Salesforce moves them over as well.

Add and remove from old Household: This option relocates the Contact to the new Household, but does not copy over any fields from the other Household, and leaves the other Household, as well as the members and opportunity history of the Household, intact. The option does move over any opportunities for which the Contact was the primary donor.

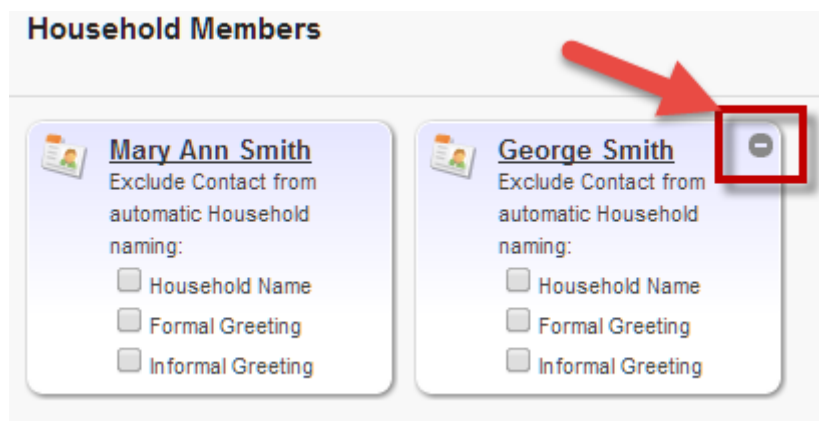
Split a Household

You may also find that you need to separate members of a Household. For example, if a child moves away, or if Household members go through a divorce.

You may also want to remove a deceased person from a Household. Doing this allows you to retain history on that Contact and establish relationships to other contacts. At the same time it ensures that you won't be sending communications to a Household that includes the deceased person in greetings.

1. Navigate to the Household record that currently contains all Household members. (If you're using the Household Account model, this is the Household Account record; if you're using the 1-to-1 or Individual "Bucket" account model, this is the Household object record.)
2. Click the Edit button.
3. On the Manage Household page, hover over the Contact card of the Contact you want to remove, and click the Delete (-) icon. When you click the Delete icon, Salesforce moves the Contact to their own separate Household.

❗ IMPORTANT : *Don't remove a Primary Contact from a Household. Remove secondary contacts only.*



4. Salesforce prompts you to save the new Household record. Click the Save button. If you don't, the Contact will remain in the current Household.

Manage Household

Changes have not been saved.

Household Members



5. On the Household record's related list, click the Opportunity name to open the Opportunity record. Then change the Opportunity's Account to the Contact's new Household record.

Opportunity Edit

George Smith- Donation 8/12/2014

Opportunity Edit

Save Save & New

Donation Information

Opportunity Name George Smith- Donation 8

Account Name Smith Household

Amount 100.00

Close Date 8/12/2014 [8/12/2014]

Lead Source --None--

Type --None--

Description

Search - salesforce.com - Enterprise Edition - Google Chrome

https://na17.salesforce.com/_ui/common/data/LookupPage?lkm=c...

Lookup

Smith Household Go! New

You can use "*" as a wildcard next to other characters to improve your search results.

< Clear Search Results

Search Results

Account Name	Account Record Type	Type	Primary Contact
Smith Household	Household Account	Household	Jimmy Smith
Smith Household	Household Account	Household	Mary Ann Smith
Smith Household	Household Account	Household	George Smith

When you save the Opportunity record, Salesforce associates and connects the Opportunity with the correct Household for that Contact.



(http://creativecommons.org/licenses/by-nc-sa/3.0/deed.en_US)

This work is licensed under a Creative Commons

(/ _ui/core/userprofile/UserProfilePage?u=00580000005PpNSAAQ) Contrib Med Cyn On Drcl d Ss Alike 3.0 Unported
(/ _ui/core/userprofile/UserProfilePage?u=00580000005PpNSAAQ) License (https://creativecommons.org/licenses/by-nc-
KELL Partners (ISV Partner Main) sa/3.0/deed.en_US).



brought to you by



salesforce.org
(<http://www.salesforce.org>)