

NPSP: Enable New Features

The Nonprofit Success Pack releases a new update (dot version) approximately every two weeks. When new objects, fields, Apex Classes or Visualforce pages are included in a release, however, they are not automatically accessible to Administrators and end users.

This document walks you through the steps you should take on a regular basis to make sure you can see and take advantage of all Nonprofit Success Pack features.

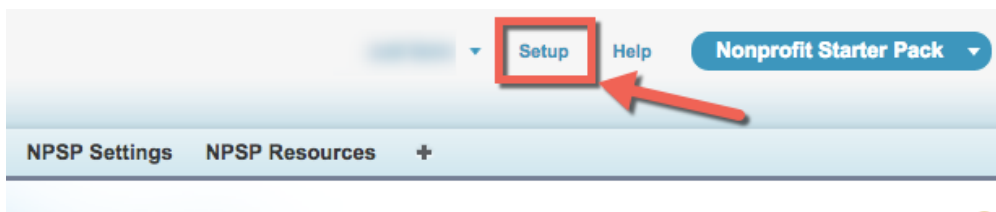
This article includes these sections:

- Confirm your Profile interface
- Enable Field Access, Apex Classes, and VisualForce Pages (Original Profile Interface)
- Enable Field Access, Apex Classes, and VisualForce Pages (Enhanced Profile Interface)

Confirm your Profile Interface

Before you begin making new features accessible, you need to know which Profile Interface you're using in Salesforce.

1. Click **Setup** on the top right-hand side of your screen. If you don't see a Setup link and you are a System Administrator, click **Setup** under your name instead.



2. Enter Profiles in the Setup sidebar search box and select **Profiles** under **Manage Users**.
3. Select the System Administrator Profile. (Note that you'll need to repeat these instructions for every Profile currently in use in your organization.)

If you're using **Original Profile Interface** you'll see something like this:

Profile Detail

[Edit](#) [Clone](#) [View Users](#)

Name	System Administrator		
User License	Salesforce	Custom Profile	<input type="checkbox"/>
Created By	Judi Sohn , 4/14/2015 3:07 PM	Modified By	Judi Sohn , 7/2/2015 9:07 AM

Console Settings

Console Layout [\[Edit \]](#)

Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Feed Item	Feed Item Layout [View Assignment]
Outlook	Not Assigned [View Assignment]	Goal	Goal Layout [View Assignment]
Home Page Layout	DE Default [View Assignment]	Goal Collaborator	Goal Collaborator Layout [View Assignment]
Account	Varies by Record Type [View Assignment]	Goal Link	Goal Link Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Idea	Varies by Record Type [View Assignment]
Campaign	Campaign Layout [View Assignment]	Job Tracker	Job Tracker Layout [View Assignment]
Campaign Member	Campaign Member Page Layout [View Assignment]	Lead	Lead Layout [View Assignment]
Case	Case Layout [View Assignment]	Macro	Macro Layout [View Assignment]
Case Close	Close Case Layout [View Assignment]	Opportunity	Varies by Record Type [View Assignment]

If you're using **Enhanced Profile Interface** you'll see something like this:

Profile Overview

Assigned Users

Description			
User License	Salesforce	Custom Profile	<input type="checkbox"/>
Created By	Judi Sohn, 4/14/2015 3:07 PM	Last Modified By	Judi Sohn, 7/2/2015 9:07 AM

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on Force.com
[Learn More](#)

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings that specify which record types, page layouts, and tabs are visible

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

External Data Source Access
Permissions to authenticate against external data sources

We provide instructions below for both the **Original Profile Interface** and the new **Enhanced Profile Interface**. You can switch between the two via the selection in Customize > User Interface as shown:

Setup

- ☒ Enable Enhanced Page Layout Editor
- ☒ Enable Enhanced Profile List Views
- ☐ **Enable Enhanced Profile User Interface**
- ☒ Enable Streaming API
- ☒ Enable Dynamic Streaming Channel Creation
- ☐ Enable Custom Object Truncate
- ☒ Enable Improved Setup User Interface
- ☒ Enable Advanced Setup Search (Beta)

Enable Field Access, Apex Classes, and VisualForce Pages
(Original Profile Interface)

1. Confirm your Profile Interface (instructions above), and select the Profile you need to give access to (for example, System Administrator).
2. Scroll to the Field-Level Security section and click **View** to the right of the object name. We show Account here, but **you will need to repeat these steps for Contact and Opportunity** objects.

Field-Level Security	
Standard Field-Level Security	
Account	[View]
Asset	[View]
Campaign	[View]
Campaign Member	[View]
Case	[View]
Coaching	[View]
Contact	[View]

Refer to this data dictionary spreadsheet (https://docs.google.com/spreadsheets/d/1TW_H-DIfUUEA1waCZis2UOxsyYBw6UUY28tvVbzTVnE/edit?usp=sharing) for a complete listing of all fields that are installed with NPSP and the version they were introduced.

3. Click **Edit** at the top of the screen.
4. Scan the list of fields and look for fields where the box is not checked in the Visible column. (These will usually be fields added in a Nonprofit Success Pack update.) For example, in this screenshot, **Funding Focus** and **Grantmaker** are new fields that were added as part of the release that included Grant Management.

First Gift Date	Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Formal Greeting	Text Area	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Funding Focus	Picklist (Multi-Select)	<input type="checkbox"/>	<input type="checkbox"/>
Grantmaker	Checkbox	<input type="checkbox"/>	<input type="checkbox"/>
Household Phone	Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Industry	Picklist	<input checked="" type="checkbox"/>	<input type="checkbox"/>

5. Check the box(es) under the Visible column, then click **Save** at the top of the screen.

IMPORTANT: *Don't forget, you'll need to repeat this process for Contact and Opportunity objects!*

6. Click Back to Profile to return to the Profile. (Don't click **Edit**!)
7. Scroll down to the **Enabled Apex Class Access** section (it's pretty far down there), and then click **Edit**.

Login IP Ranges

New

No login IP ranges specified. Users from any IP address are allowed to log in.

Enabled Apex Class Access

Edit

Apex Class Name	AppExchange Package Name
apsona.ApsonaUtils	Apsona for Salesforce
npe01.IndividualAccounts	Contacts & Organizations
npe4.Relationships_INST	Relationships
npo02.Households	Households
npsp.ADDR_Validator_REST	Nonprofit Starter Pack
npsp.BDI_DataImport_API	Nonprofit Starter Pack
npsp.CONV_Account_Conversion_BATCH	Nonprofit Starter Pack

- If there are any Apex classes that begin with npsp., click the arrow button to add them to the Enabled Apex Classes column.

Enable Apex Class Access

Save

Cancel

Available Apex Classes

Enabled Apex Classes

npsp.ADDR_Validator_REST

npsp.BDI_DataImport_API

npsp.ERR_Handler_API

npsp.TDTM_Config_API

npsp.UTIL_CustomSettings_API

npsp.UTIL_RecordTypes_API

Add

Remove

npe01.IndividualAccounts

npe4.Relationships_INST

npo02.Households

npsp.CONV_Account_Conversion_BATCH

npsp.HH_ManageHousehold_EXT

npsp.REL_RelationshipsViewer_CTRL

npsp.STG_InstallScript

npsp.STG_UninstallScript

npsp.TDTM_Runnable

npsp.UTIL_IScheduled

- Click **Save**.

- Back on the Profile page, scroll down to the **Enabled Visualforce Page Access** section, and then click **Edit**.

Enabled Visualforce Page Access		Edit
Visualforce Page Name	AppExchange Package Name	
apsona.ApsonaForSalesforce	Apsona for Salesforce	
apsona.apsonaEchoCSV	Apsona for Salesforce	
npe01.BTN_MatchingDonation	Contacts & Organizations	
npe01.ContactDonationCredit	Contacts & Organizations	
npe01.ContactMerge	Contacts & Organizations	
npe01.ContactNewOverride	Contacts & Organizations	
npe01.PaymentMapping	Contacts & Organizations	
npe01.PaymentWizard	Contacts & Organizations	
npe01.accountViewOverride	Contacts & Organizations	
npe01.contactDeleteOverride	Contacts & Organizations	

- As before, if there are any Visualforce pages that begin with npsp. on the Available side, click the arrow to move them to the Enabled side.

Enable Visualforce Page Access

Save

Cancel

Available Visualforce Pages

npsp.ALLO_ManageAllocations

npsp.ALLO_RollupBTN

npsp.BDI_DataImport

npsp.OPP_OpportunityNamingBTN

npsp.OPP_SendAcknowledgmentBTN

npsp.STG_PanelAlloBatch

npsp.STG_PanelAllocations

npsp.STG_PanelOppNaming

Add

Remove

Enabled Visualforce Pages

npe01.BTN_MatchingDonation

npe01.ContactDonationCredit

npe01.ContactMerge

npe01.ContactNewOverride

npe01.PaymentMapping

npe01.PaymentWizard

npe01.accountViewOverride

npe01.contactDeleteOverride

npe01.contactsSettings

npe01.leadConvertOverride

npe03.RecurringDonationsSettings

npe03.RecurringDonations_AddDonationsBTN

npe4.RelationshipsSettings

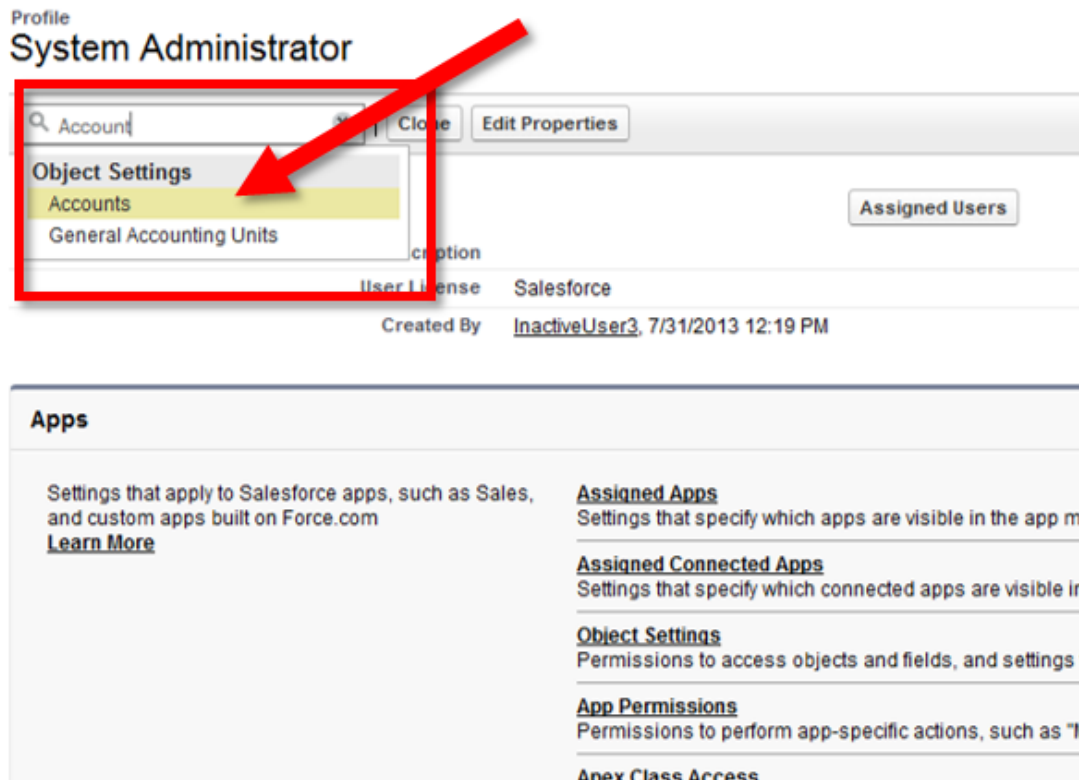
npe4.RelationshipsViewer

- Click **Save**.

Lastly, you'll want to make sure these fields are added to page your layouts, if not already there. Review your page layouts and drag over any new fields you selected in the above steps. For more information, see the page layouts documentation (https://help.salesforce.com/apex/HTViewHelpDoc?id=customize_layout.htm&language=en_US) in Salesforce Help & Training.

Enable Field Access, Apex Classes, and VisualForce Pages (Enhanced Profile Interface)

1. Confirm your Profile Interface (instructions above), and select the Profile you need to give access to (for example, System Administrator).
2. In the **Find Settings box** enter Accounts, and click on **Accounts** under the **Object Settings Section**.
You will need to repeat these steps for Contact and Opportunity objects.



3. Click **Edit** at the top of the screen.

Profile

System Administrator

Find Settings...



Clone

Edit Properties

Profile Overview >

Object Settings



Accounts



Accounts

Tab Settings

Default On

Edit

4. Scroll to the **Field Permissions** section. Scan the list of fields and look for fields where the box is not checked in the Visible column. (These will usually be fields added in a Nonprofit Success Pack update.) For example, in this screenshot, **Funding Focus** and **Grantmaker** are new fields that were added as part of the release that included Grant Management.

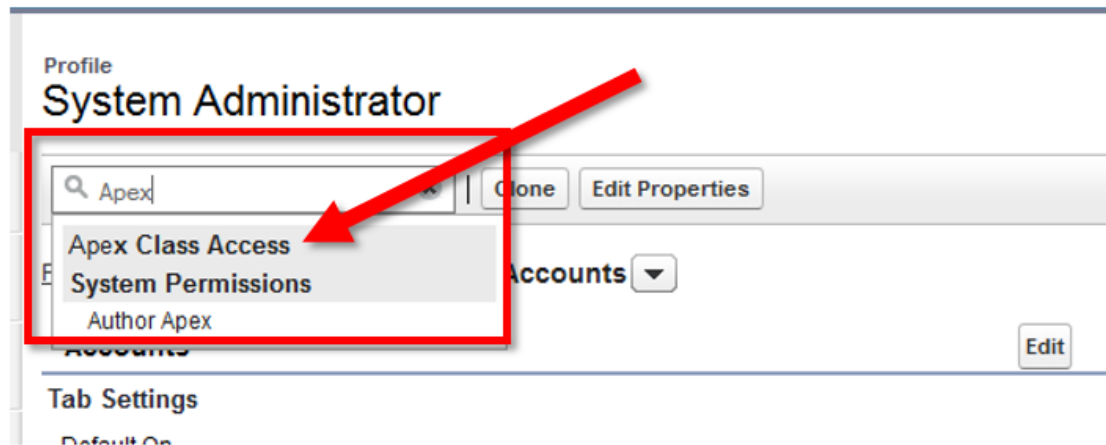
First Donation Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
First Gift Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Formal Greeting	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Funding Focus	<input type="checkbox"/>	<input type="checkbox"/>
Grantmaker	<input type="checkbox"/>	<input type="checkbox"/>
Household Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Industry	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Informal Greeting	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Refer to this data dictionary spreadsheet (https://docs.google.com/spreadsheets/d/1TW_H-DIfUUEA1waCZis2UOxsyYBw6UUY28tvVbzTVnE/edit?usp=sharing) for a complete listing of all fields that are installed with NPSP and the version they were introduced.

5. Check the box(es) under the Read and Edit columns, then click **Save** at the top of the screen.

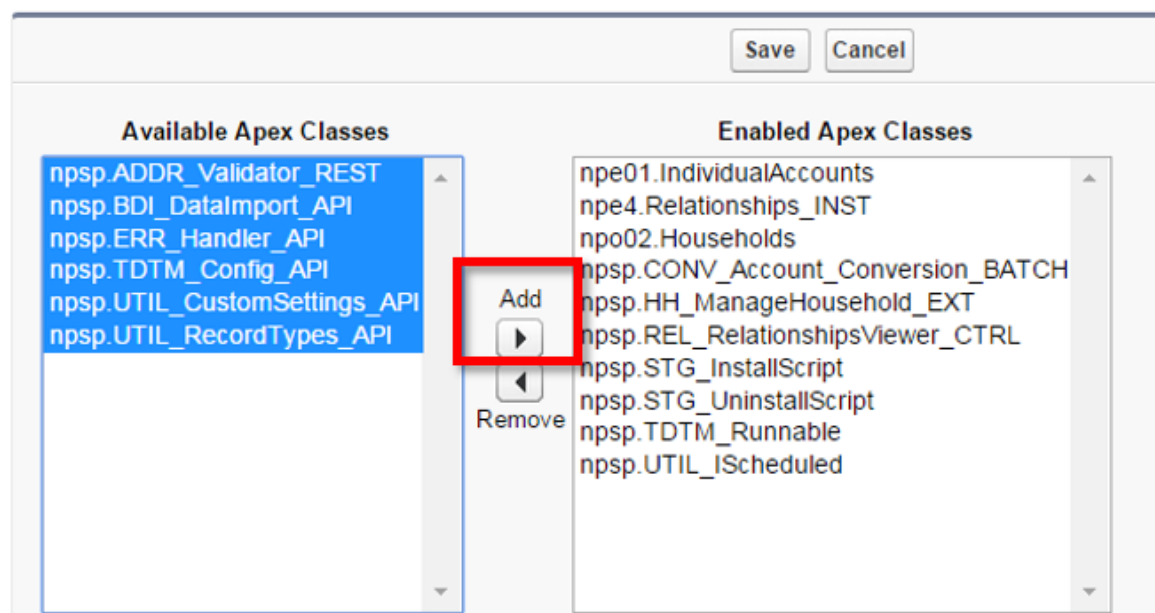
IMPORTANT: *Don't forget, you'll need to repeat this process for Contact and Opportunity objects!*

6. Enable Apex Class Access by going back to the top of the Profile and typing in Apex in the search box, and then choosing **Apex Class Access**.
7. Click **Edit**.

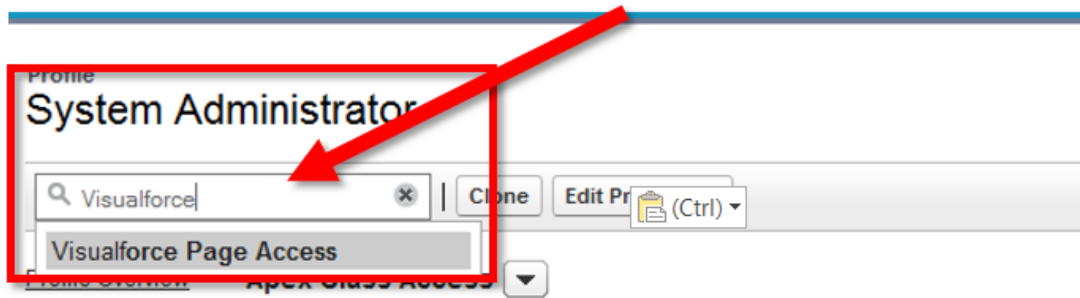


8. If there are any Apex classes that begin with npsp., click the arrow button to add them to the Enabled Apex Classes column.

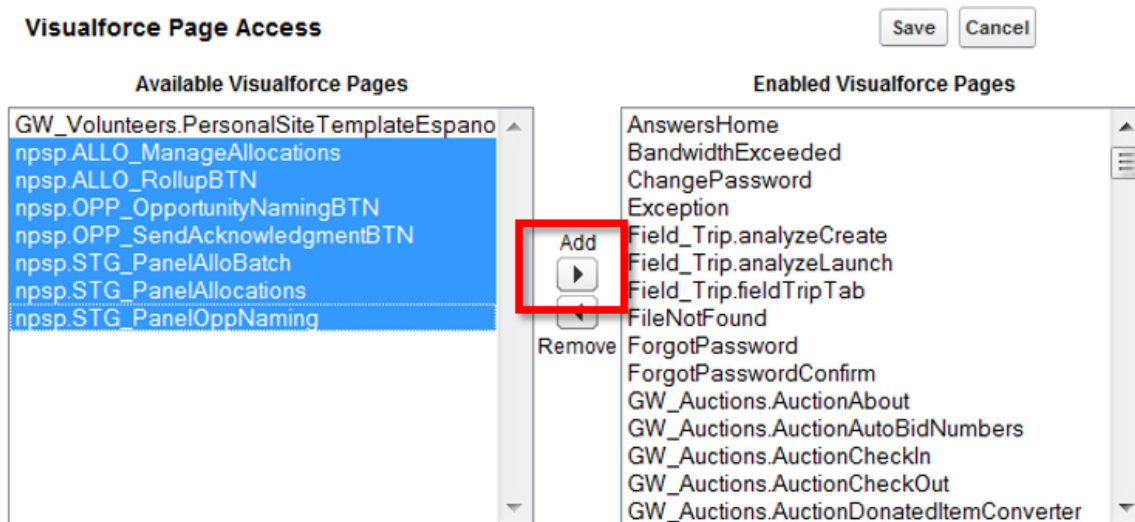
Enable Apex Class Access



9. Click **Save**.
10. Next, you will want to grant **Visualforce Page Access** by going back to the top of the Profile and typing in Visualforce in the search box. and then choosing **Visualforce Page Access**. Then click **Edit**.



11. As before, if there are any Visualforce pages that begin with npsp. on the Available side, click the arrow to move them to the Enabled side.



12. Click **Save**.

Lastly, you'll want to make sure these fields are added to page your layouts, if not already there. Review your page layouts and drag over any new fields you selected in the above steps. For more information, see the page layouts documentation (https://help.salesforce.com/apex/HTViewHelpDoc?id=customize_layout.htm&language=en_US) in Salesforce Help & Training.



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