

NPSP: Nonprofit Success Pack Post-Install Checklist

For "clean slate" organizations

! IMPORTANT: *If you're upgrading from a previous version of NPSP, this doc is not for you. See the [Nonprofit Success Pack Upgrade Guide \(/articles/Resource/Upgrade-to-NPSP3-from-a-Previous-Version-of-NPSP?popup=false&navBack=H4sIAAAAAAAAAAluuVipWslLyzssvz0INSU_1yM9NVdJRygaKFSSmp4ZkluSA-KVAvn58aaZ-NkyhPpCDqqs2FgCHRwp0TQAAAA\)](/articles/Resource/Upgrade-to-NPSP3-from-a-Previous-Version-of-NPSP?popup=false&navBack=H4sIAAAAAAAAAAluuVipWslLyzssvz0INSU_1yM9NVdJRygaKFSSmp4ZkluSA-KVAvn58aaZ-NkyhPpCDqqs2FgCHRwp0TQAAAA) instead.*

When installing Nonprofit Success Pack on top of new ("clean slate") Enterprise or Developer Editions of Salesforce, you'll need to perform these additional steps:

- Update Opportunity Sales Processes, Record Types, and Stages
- Assign New Record Types to Profiles
- Edit Page Layouts
- Assign Page Layouts
- Override Lead Conversion Button
- Run Health Check

Update Opportunity Sales Processes, Record Types, and Stages

The Nonprofit Success Pack only installs an NPSP Default Sales Process and Record Type.

Sales Processes

Use this page to create and maintain the Sales Processes used within your organization. A Sales Process contains the Stages an Opportunity follows through its sales cycle.

Note: After creating a new Sales Process, associate it with one or more [Opportunity Record Type](#) to apply it to new opportunities.

Sales Process			
New			
Action	Sales Process Name	Description	Active
Edit Del	NPSP_Default		✓

You will need to create additional Opportunity Stages, Opportunity Sales Processes and Opportunity Record Types to match your organization's business processes. For example, if your organization handles memberships, you'll want to create a Membership Record Type and appropriate stages for a Membership opportunity's process.

NOTE: *You will need to create a Record Type for Membership if you will use Membership features. You will need to create a new Opportunity stage for 'Pledged' set as an Open stage if you will use Payment scheduling or Recurring Donation features. The Probability and Forecast Category doesn't matter - it just has to be an Open stage and available on the Sales Process/Record Type where needed.*

Save Save & New Cancel

Stage Name Pledged

Type Open

Probability 50

Forecast Category Pipeline

Description

Chart Color Assigned dynamically

You may find that the 'Pledged' stage installed with NPSP is inactive and will need to be deleted (on a fresh install, you can just select another stage to replace it). Then you can create an active 'Pledged' stage as shown above.

Assign New Record Types to Profiles

Nonprofit Success Pack installs with additional Record Types for Account (Household and Organization), but they are not assigned to any profiles upon installation, so they will not be visible to anyone until enabled.

In Salesforce Setup, go to **Administer | Manage Users | Profiles**, click on each Profile used, and assign Account and Opportunity record types to the profile. In the old profile interface, you scroll to the Record Types section and click the [Edit] link:

Record Type Settings

Standard Record Type Settings

Accounts --Master--

[Edit]

Announcements

In the new profile interface, click Object Access and then the name of the object, then check the record types to add.

Edit Page Layouts

In Salesforce Setup, go to **Build | Customize | Accounts | Page Layouts**. Click on Household Layout and add additional Publisher Actions that are available as needed by business process requirements. You will also want to add the Addresses related list.

Related Lists

Contacts

Contact Name	Title	Email	Phone
Sarah Sample	Sample Title	sarah.sample@company.com	1-415-555-1212

Addresses

Address ID	Address Type	Default Address	Mailing Street	Mailing City	Mailing State/Province	Mailing Zip/Postal Code	Latest Start Date	Latest End Date
Sample Address ID	Sample Address Type	✓	Sample Mailing Street	Sample Mailing City	Sample Mailing State/Province	Sample Mailing Zip/Postal Code	8/25/2014	8/25/2014

Assign Page Layouts

Nonprofit Success Pack installs with one Page Layout for Contact, 2 page layouts for Account (Household and Organization) and 2 page layouts for Opportunity (Donation and Membership). To identify the NPSP page layouts, you'll need to look for the managed package icon and Installed Package as Cumulus.

In Salesforce Setup, go to **Build | Customize | (object) | Page Layouts**. Click on the Page Layout Assignment button, then Edit Assignment and select the managed package layouts to replace the standard layouts.

Edit Page Layout Assignment

Account

Help for this Page

The table below shows the page layout assignments for different record type and profile combinations. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the dropdown.

SaveCancel

Page Layout To Use:

Organization Layout

22 Selected

44 Changed

Profiles	Record Types			(1-3 of 3)
	Master	Household Account	Organization	
Contract Manager	Account Layout	Household Layout	Organization Layout	
Cross Org Data Proxy User	Account Layout	Household Layout	Organization Layout	
Custom: Marketing Profile	Account (Marketing) Layout	Household Layout	Organization Layout	
Custom: Sales Profile	Account (Sales) Layout	Household Layout	Organization Layout	
Custom: Support Profile	Account (Support) Layout	Household Layout	Organization Layout	
Customer Community Login User	Account Layout	Household Layout	Organization Layout	
Customer Community User	Account Layout	Household Layout	Organization Layout	
Customer Portal Manager Custom	Account Layout	Household Layout	Organization Layout	
Customer Portal Manager Standard	Account Layout	Household Layout	Organization Layout	
Force.com - App Subscription User	Account Layout	Household Layout	Organization Layout	
Gold Partner User	Account Layout	Household Layout	Organization Layout	
High Volume Customer Portal	Account Layout	Household Layout	Organization Layout	
Marketing User	Account Layout	Household Layout	Organization Layout	
Partner App Subscription User	Account Layout	Household Layout	Organization Layout	
Partner Community Login User	Account Layout	Household Layout	Organization Layout	
Partner Community User	Account Layout	Household Layout	Organization Layout	
Read Only	Account Layout	Household Layout	Organization Layout	
Silver Partner User	Account Layout	Household Layout	Organization Layout	
Solution Manager	Account Layout	Household Layout	Organization Layout	
Standard Platform User	Account Layout	Household Layout	Organization Layout	
Standard User	Account Layout	Household Layout	Organization Layout	
System Administrator	Account Layout	Household Layout	Organization Layout	

SaveCancel

Repeat for the Page Layouts in other objects.

Override Lead Conversion Button

In Salesforce Setup, go to **Build | Customize | Leads | Buttons, Links and Actions**. Click Edit to the left of Convert and select LD_LeadConvertOverride [np__LD_LeadConvertOverride] Visualforce page:

Override Properties Save Cancel

Label	Convert
Name	Convert
Default	Standard Salesforce.com Page
Override With	<input type="radio"/> No Override (use default) <input type="radio"/> Custom S-Control --None-- <input checked="" type="radio"/> Visualforce Page LD_LeadConvertOverride [npsp__LD_LeadConvertOverride]
Comment	<div></div>

Save Cancel

You should also set these additional button changes:

- **Household Account model only:** Account: Edit 'Edit' button to use HH_ManageHHAccount [npsp__HH_ManageHHAccount] Visualforce page
- **One to One or Individual bucket model only:** Account: Edit 'View' button to use ACCT_ViewOverride [npsp__ACCT_ViewOverride] Visualforce page
- **One to One or Individual bucket model only:** Household custom object: Edit 'View' and 'New' buttons to use HH_ManageHousehold [npsp__HH_ManageHousehold] Visualforce page

Run Health Check

At this point, you should run Health Check in the **NPSP Settings tab | System Tools**. Running Health Check will tell you if there are any configuration steps that you need to correct.

You should also create a test contact, account/household and opportunity to confirm that everything appears as it should.



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