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NPSP: Auto-Created Relationships

Using the Auto-Create functionality, Relationships can be automatically generated off of any Contact lookup field on either the Contact or the Campaign Member.

Navigate to the Relationships Tab



You can either use the Nonprofit Settings app if configured (not shown), or go to the '+' sign at the far right-hand side of your tab row, and select Relationships Setting from the available tabs.

Auto-Created Relationships

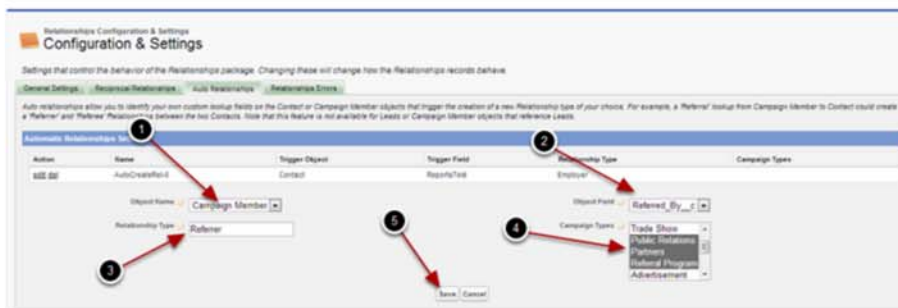


Navigate to the 'Auto Relationships' subtab (1).

Auto-created Relationships can be added to a Contact lookup field on either Contacts, or Campaign Members that are related to Contacts (Lead-based Campaign Members are not eligible). With the exception of the 'Reports To' field on the Contact, only custom fields can be used.

You can define multiple fields that when changed, will trigger the creation of a new Relationship between the two Contacts. The 'Name' of the Automatic Relationship Setting is automatically generated (2), the 'Trigger Object' defines what object your custom field is on (3), the 'Trigger Field' is Contact lookup field that trigger the new Relationship (4), while 'Relationship Type' is the type of Relationship to be created between the two Contacts (5). If you're using the Campaign Member object, you'll also need to define which Campaign Types to include in the auto-creation (6). Use the 'edit' and 'del' links to edit or delete existing Automatic Relationship settings (7). To add a new Auto-Created Relationships, click on the 'Add New Auto-Created Relationship' link (8).

Adding a New Auto-Created Relationship



(1) Select the Object Type (Contact or Campaign Member). The selection will determine the Object Field options that are available, as well as access to the Campaign Types picklist

(2) Select the Object Field. Here, I've chosen the 'Referred_By__c' custom Contact lookup field I created on the Campaign Member object

(3) Choose the Type of the Relationship to be created. The reciprocal Type will automatically be created as well. The Type does not have to be available in the Relationship Type picklist to be used here.

(4) Select the Campaign Types on which this auto-create should fire. Here we've selected three.

(5) Click 'Save' when complete.



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