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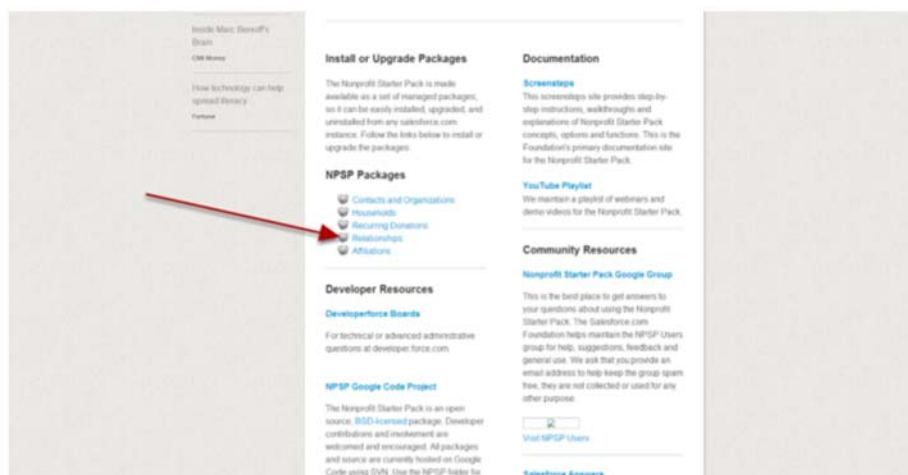
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NPSP: Installing or Updating to Relationships 2.0

This article will explain the steps necessary to install and configure Relationships 2.0 into a new or existing Salesforce.com org, including those running earlier versions of the Relationships package. NOTE: It is ALWAYS recommended to install to a sandbox or developer edition, prior to installing to your production instance, to confirm compatibility and test functionality.

Click on the install link for the application



Click on the installation link for the latest version of the Relationships package. The link can be found on the Salesforce Foundation website, or via the AppExchange listing for the package.

Login to the org you wish to install to

salesforce

User Name

Password

☐ Remember User Name

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You may need to login to your production, sandbox or developer edition org to install the package. Provide your credentials when prompted.

Confirm Package Details

Package Installation Details

Package Name	Relationships
Version Number	2.0
Publisher	Salesforce.com Foundation
Description	

[Cancel](#)

Package Components

▼ Objects (5)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Relationship Error		Custom Object	This is a brand new component
Create	Relationship Lookup		Custom Setting	This is a brand new component
Create	Relationship Auto Create		Custom Setting	This is a brand new component
Create	Relationship		Custom Object	This is a brand new component
Create	Relationship Settings		Custom Setting	This is a brand new component

▼ Tabs (1)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Relationship Settings		Tab	This is a brand new component

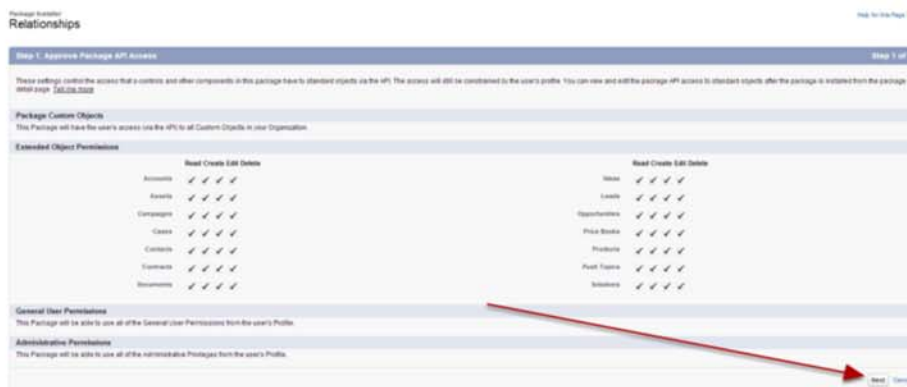
▼ Code (16)

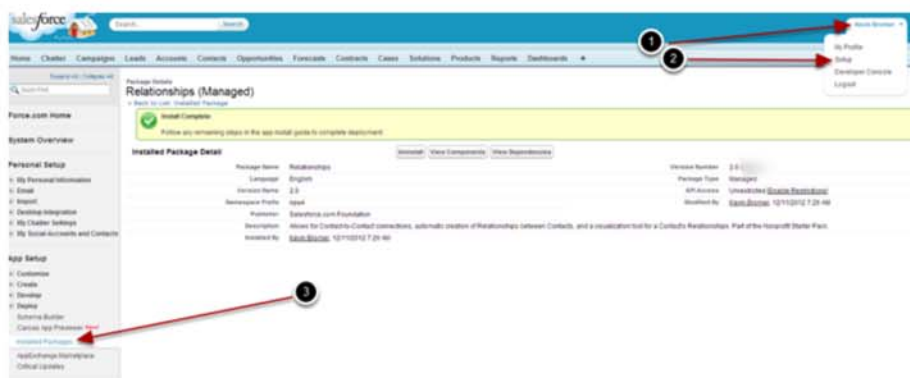
Action	Component Name	Parent Object	Component Type	Installation Notes
Create	TEST_Relationships		Apex Class	This is a brand new component
Create	Relationships_HIST		Apex Class	This is a brand new component
Create	Relationships	Relationships__c	Apex Trigger	This is a brand new component
Create	Relationships		Apex Class	This is a brand new component
Create	RelationshipSettings_CTR		Apex Class	This is a brand new component
Create	RelationshipViewer_CTR		Apex Class	This is a brand new component
Create	RelationshipCampaignMembers	Campaign Member	Apex Trigger	This is a brand new component
Create	Relationships_Old		Apex Class	This is a brand new component
Create	Relationships_PrivacyControl		Apex Class	This is a brand new component
Create	Relationships/Contacts	Contact	Apex Trigger	This is a brand new component

▼ Fields (0)

Action	Component Name	Parent Object	Component Type	Installation Notes
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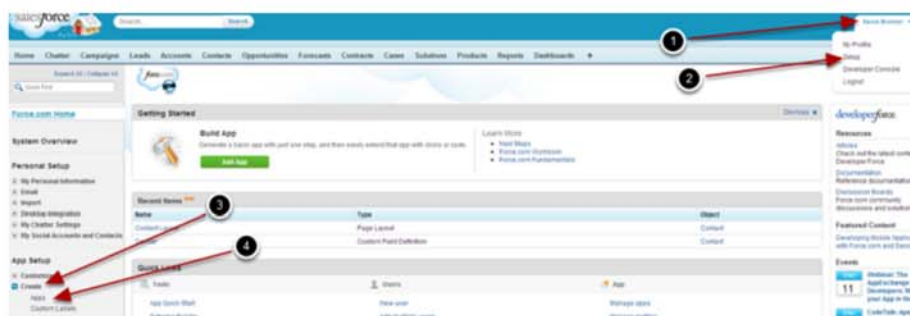
Once logged-in, you'll need to confirm the details of the package you're installing. Click 'Continue' when ready.





Confirm your package installation is complete. You may see the above screen, or may need to check manually by going to <Your Name>|Setup|Installed Packages and looking for the Relationships package.

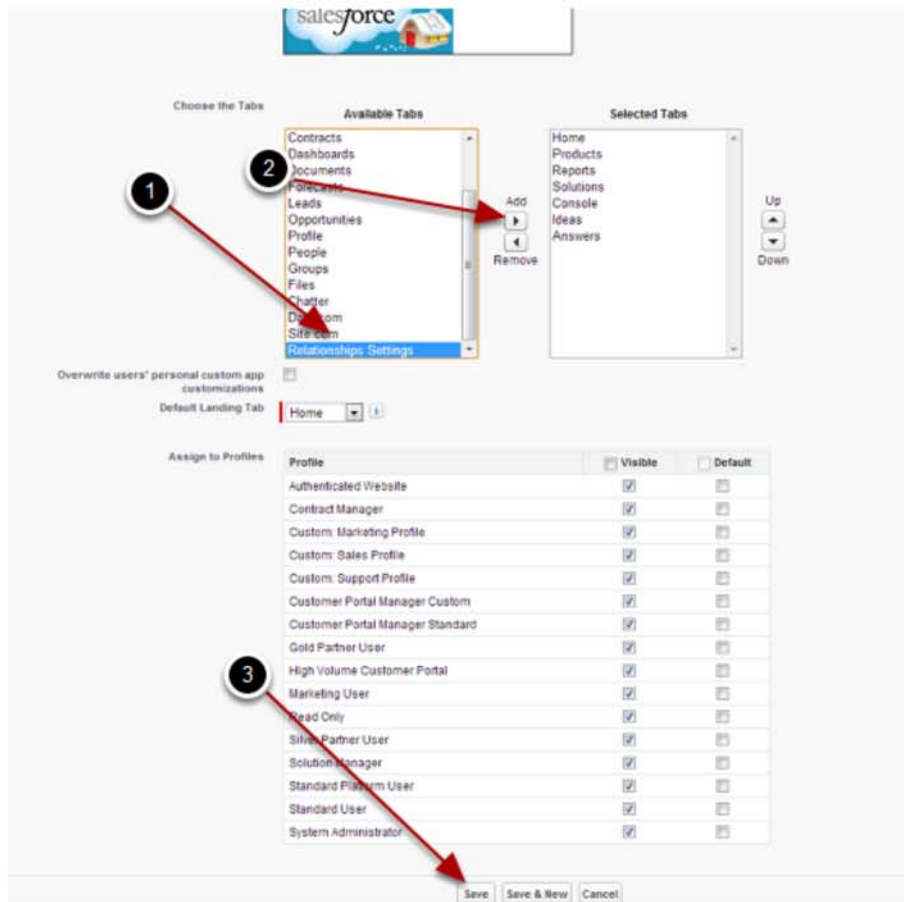
Add Relationships Settings Tab to your Nonprofit Settings App (Optional)



You can optionally add the Relationships Settings tab to your Nonprofit Settings App, if available (not all orgs will have this app). To do so, go to <Your Name>|Setup|Create|Apps

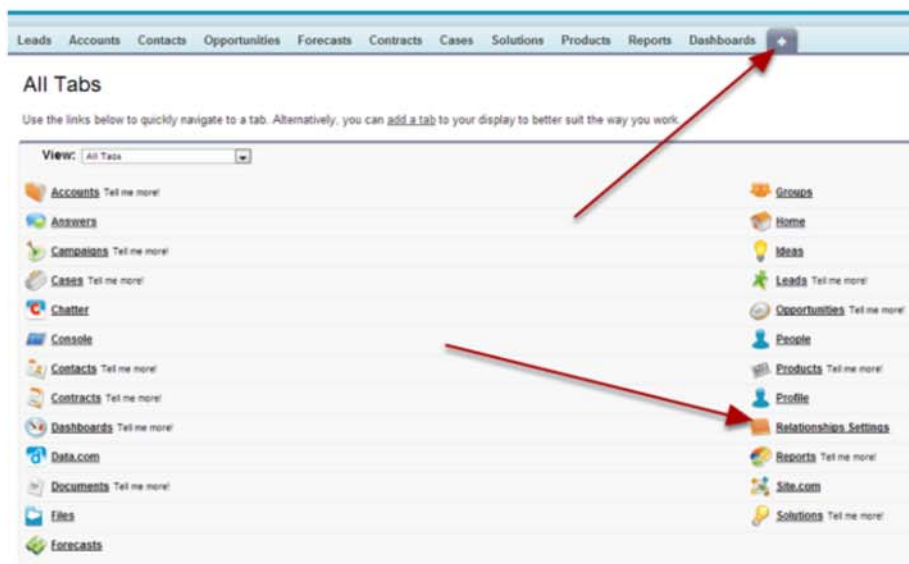
Click on 'Nonprofit Settings' and then 'Edit' (not shown)

Add Relationships Settings Tab to your Nonprofit Settings App (Optional, cont.)



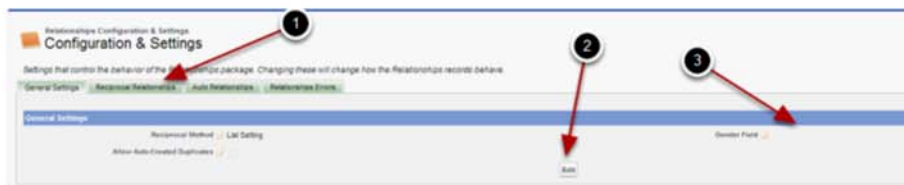
Highlight the 'Relationships Settings' tab under 'Available Tabs', and click 'Add' to add it to your list of tabs. Click 'Save' when complete.

Navigate to the Relationships Settings Tab



Navigate to the Relationships Settings tab, either by selecting it from your Nonprofit Settings App, or click on the '+' sign at the far right-hand side of your tab row, and select it from the list of available tabs.

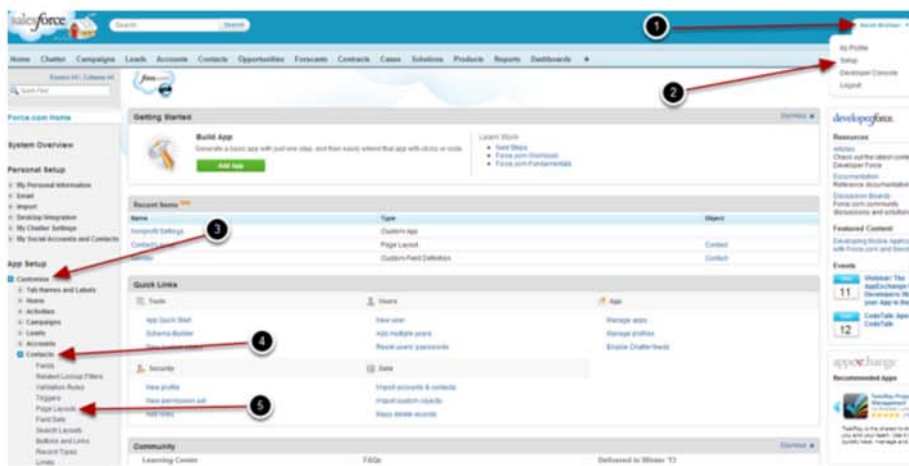
Confirm Settings - (Optional: Set gender field)



Confirm your Relationships settings. 'Reciprocal Relationships' should have default values populated (1).

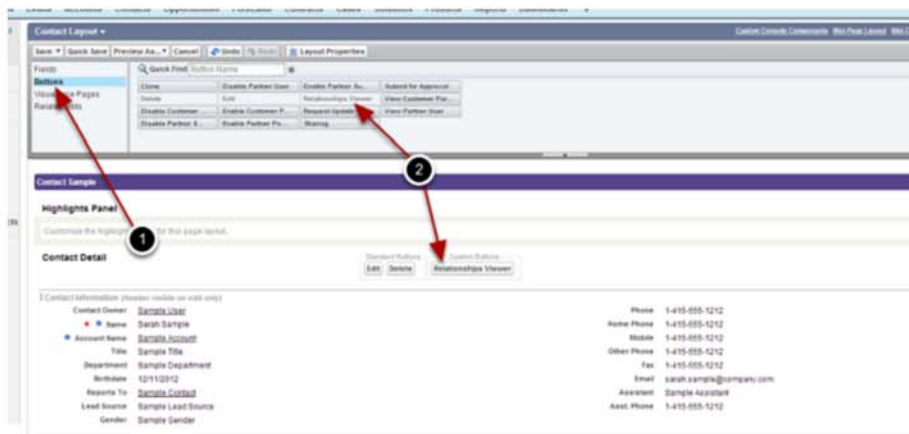
In 'General Settings', you can optionally select a field used to define a Contact's gender, if your organization has one available. Click 'Edit' (2), and then select available custom fields to use for Contact gender (3). More information on this option is available in the Configuration and Settings section for Relationships of these Screensteps.

Configure Contact Layout



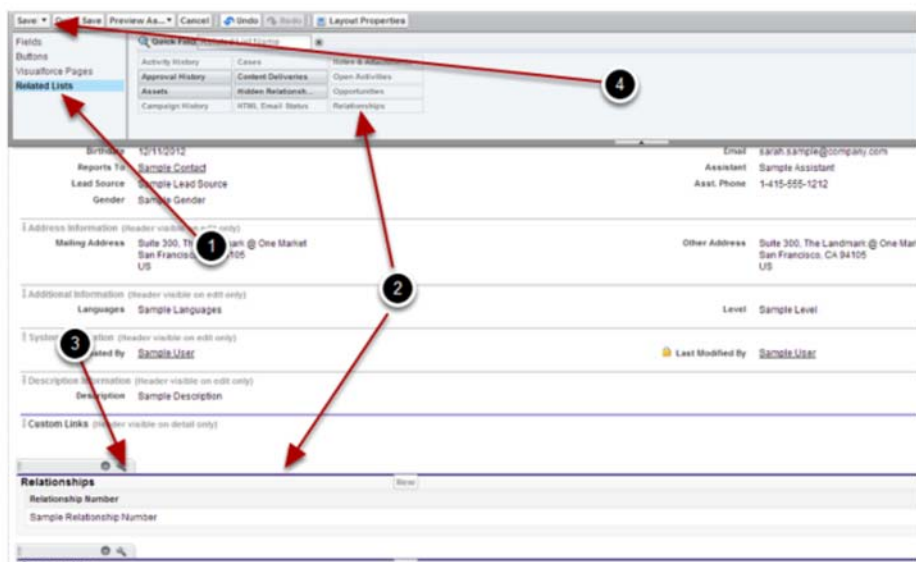
Configure the Contact page layout to display the correct buttons and related lists. Go to <Your Name>|Setup|Customize|Contacts|Page Layouts and then click 'Edit' next to the name of the page layout you wish to edit (not shown).

Configure Contact Layout (cont.)



In the 'Button' menu (1), click and drag the 'Relationships Viewer' button into your custom buttons section (2).

Configure Contact Layout (cont.)



In the 'Related List' menu (1), drag the 'Relationships' related list onto the layout (2).

Click the wrench symbol (3) to edit the fields displayed. Type, Status, Relationships Explanation and Related Contact are recommended fields for the related list layout. (not shown)

Click 'Save' when complete (4).



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