

NPSP: Create, Edit, and View Relationships

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Overview

Relationships in the Nonprofit Success Pack connect one Contact to another. (This is different from *Affiliations*, which connect Contacts with Organizations.) When you create these connections, you can also define the type of relationship (Friend, Family, Mother, Daughter, and so on), and the relationship status (Current, Former).

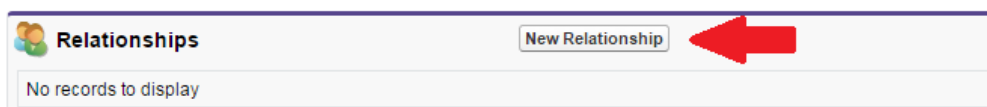
Whenever you create a Relationship in the Nonprofit Success Pack, the NPSP automatically creates a “reciprocal relationship,” which reflects this same relationship in the other direction. For example, if you create a relationship from Tom’s Contact record, and specify Sandy as his wife, Sandy’s Contact record will also reflect that she has a husband, Tom. The NPSP does this to ensure that relationship types are accurate, no matter where you’re viewing them from.

Relationship behavior in the Nonprofit Success Pack is controlled by your Relationships Settings. To learn more about these settings and the adjustments you can make to them, see [Manage Relationships Settings \(/articles/Resource/NPSP-Manage-Relationships-Settings?](#)

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Create a New Relationship

1. Navigate to the Contact you want to create the Relationship for.
2. Scroll down to the Relationships related list and then click New Relationship.



NOTE: If you don't see the Relationships related list, you might need to add it to your page layout. For more information, search "customizing page layouts" in Salesforce Help & Training (<https://help.salesforce.com/home>).

3. Enter relationship information into the fields. Here's an example of the fields you might see. (Your Salesforce instance might look a bit different.)

Relationship Edit Help fo

New Relationship

Relationship Information ! = Required

Contact ! Mr. Jeffrey Baron 🔍 Related Contact ! Lois Baron 🔍

Type ! Wife ▼ Status ! Current ▼

Description !

Save Save & New Cancel

Contact - the NPSP auto-populates this field with the name of your contact.

Related Contact - Lets you look up the related Contact record.

Status – Current or Former.

Type -- Specifies how you "relate" this contact to the Related contact.

! IMPORTANT : *The Relationship Type describes the Related Contact's relationship to the Main Contact, **not** the Main Contact's relationship to the Related Contact.*

4. Click Save.

In our example above, Lois Baron is Jeffrey Baron's Wife. Once we save the Relationship on Jeffrey Baron's record, the NPSP automatically creates a reciprocal Relationship on Lois Baron's Contact record.

As seen from Jeffrey Baron's record:

Action	Related Contact	Relationship Explanation	Status	Type	Created Date	Relationship Number
Edit Del	Lois Baron	Mrs. Lois Baron is Mr. Jeffrey Baron's Wife	Current	Wife	2/15/2015	R-000967

As Seen from Lois Baron's record:

Action	Related Contact	Relationship Explanation	Status	Type	Created Date	Relationship Number
Edit Del	Jeffrey Baron	Mr. Jeffrey Baron is Mrs. Lois Baron's Husband	Current	Husband	2/15/2015	R-000968

Edit an Existing Relationship

To modify an existing relationship, go to either Contact record, scroll to the Relationships related list, click Edit next to the Relationship you want to edit, and make your changes.

Relationships New Relationship				
Action	Related Contact	Relationship Explanation	Status	Type
Edit Del	Jane Smith	Mrs. Jane Smith is Mr. Joseph Smith's Wife	Current	Wife



View Relationships with the Relationships Viewer

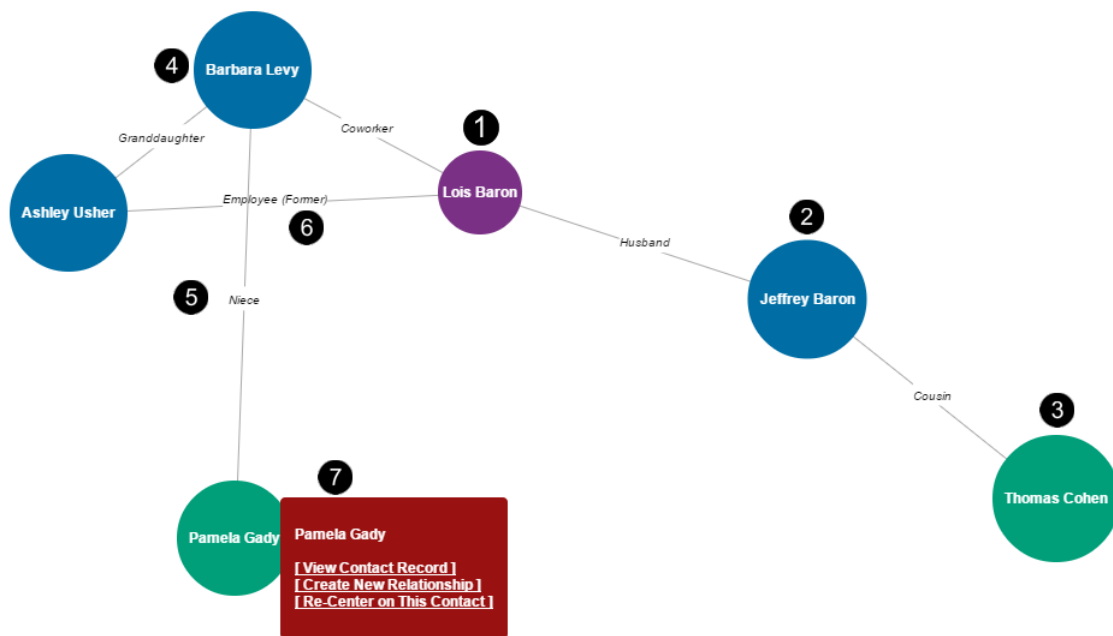
The Relationships Viewer provides a visual representation of how your contacts are connected. By default the Relationships Viewer shows connections for a single Contact (the base contact), but you can show second- and third-level relationships as well.

To launch the Relationship Viewer, navigate to a Contact record and click the Relationships Viewer button. (It's at the top of the Contact Detail section.)

Contact Detail		Edit	Delete	Relationships Viewer
▼ Contact Details				
Name	Mrs. Jane Smith			
Account Name	Smith Household			
Primary Affiliation	👤			

If you don't see the button, you probably need to add it to your page layout. (See [Add the Relationships Viewer to the Page Layout](#) for more details.)

Understanding the Connections



We've color-coded the order of connections, and it goes like so:

Base Contact (1): The Contact record you started from (purple). The Relationships Viewer uses this contact as the base from which to create the connections. (There can only be one base contact)

First-Connection (2): All first-order relationships as they relate to the base contact (blue).

The colors for each additional contacts beyond first-order Relationships will differ based on how far they are from the original Contact. In this example, second-order Relationships are shown in **green**. (3)

Double-Click on other contacts to add the next order of related Contacts and Relationships. (4)

The Type of Relationship is:

- Shown on the line connecting the Contacts. (5)
- If the Relationship is no longer current, the Viewer indicates the Former status in parentheses next to the Relationship Type. (6)

Hover over a contact to see a menu (7) of available options (the red box). The menu displays information about the Contact and associated Account with links to:

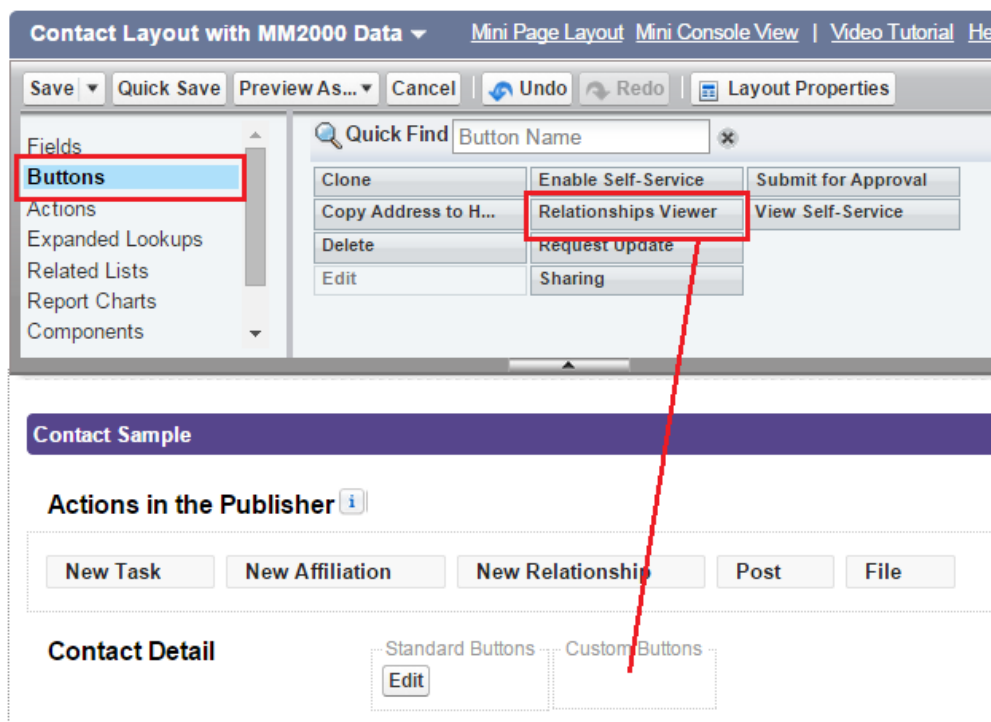
- Viewing the Contact detail page in a new window
- Creating a new Relationship for this contact
- Re-centering the Relationship Viewer on this Contact

Add the Relationships Viewer to the Page Layout (if necessary)

If the Relationships Viewer button on Contact records isn't visible, you can add it to the Contact layout by following these steps:

1. From Setup, enter Contacts in the Quick Find box, then select Page Layouts under the Contacts menu.
2. Click Edit next to the appropriate Contact Layout.

3. Select Buttons from the left column, drag the Relationships Viewer item to the Custom Buttons section, and click Save.



Special thanks to Brian Pickett, who also contributed to this documentation.



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