

NPSP: Manage Relationships Settings

This administrator-level document explains Relationships settings and how they affect Relationship behavior.

This article contains these sections:

- Overview
- General Relationships Settings
- Reciprocal Relationships Settings
- Add a New Reciprocal Relationship to the List Setting
- List Setting Scenarios
- Relationships Autocreation Settings

Overview

Your Relationships Settings control how Relationships behave in the Nonprofit Success Pack. There are three main areas to the settings:

- General Relationships Settings
- Reciprocal Relationships Settings
- Relationships Autocreation Settings

This document walks you through each of the major areas.

You can find Relationship Settings by clicking the NPSP Settings Tab. Then click the Relationships menu to expand the settings.

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General Relationships Settings

There are three General Settings for Relationships:

- Reciprocal Method
- Gender Field
- Allow Auto-Created Duplicates

Reciprocal Method

This setting is perhaps the most important of your Relationships settings, because it determines how the Nonprofit Success Pack generates your reciprocal relationships. There are two options:

List Setting (the default) works in conjunction with gender and other predefined settings from your Reciprocal Relationships Settings “list” (see below) to set the appropriate Type on the reciprocal relationship. For example, if you create a relationship from a male’s Contact record with Type “Son,” the NPSP automatically creates a reciprocal relationship of “Father” on the son’s record. Most people leave the List Setting as the default and don’t change it.

Value Inversion works to reverse the relationship where it can. The key is to enter a Type with a delimiter around which the system will swap the words. So a Relationship with a type of "Mother-Daughter" would receive a reciprocal Type of "Daughter-Mother." Value Inversion does not use any of the values in Relationship Reciprocal Settings. Instead, you only need to create picklist values on the Relationship object’s Type field for both “Mother-Daughter” and “Daughter-Mother,” as in the above example.

With the List Setting method, Salesforce determines the appropriate gender-specific type based on one of two methods:

Pre-defined Gender field: The Reciprocal Relationships setting looks for Female or Male values in a custom field on Contact records specifically for the purpose of tracking gender (see below). **This field is not standard in Salesforce and must be created by a system administrator.**

Salutations: In the case where Salesforce cannot identify a gender on the contact, Salesforce evaluates the Salutation field to determine gender, if possible.

Ms. or Mrs. = Female

Mr. = Male

Gender Field

This field specifies the gender of a Contact for the purposes of creating a reciprocal relationship. The value in the Gender field “interacts” with the values in the Reciprocal Method field (described above) to determine the correct reciprocal relationship. For example, if you create a Relationship from a “Mother” Contact record to a female Contact record, the NPSP creates a reciprocal relationship of “Daughter,” as opposed to “Son.”

The Gender field can be any custom picklist or text field on the Contact record with the required values being Male and Female. You can add other values to the picklist as well without affecting the reciprocal relationship

feature.

Allow Auto-Created Duplicates

This setting is specific to the feature that auto-creates relationships based on a custom lookup field. (See Relationships Autocreation Settings for more information.)

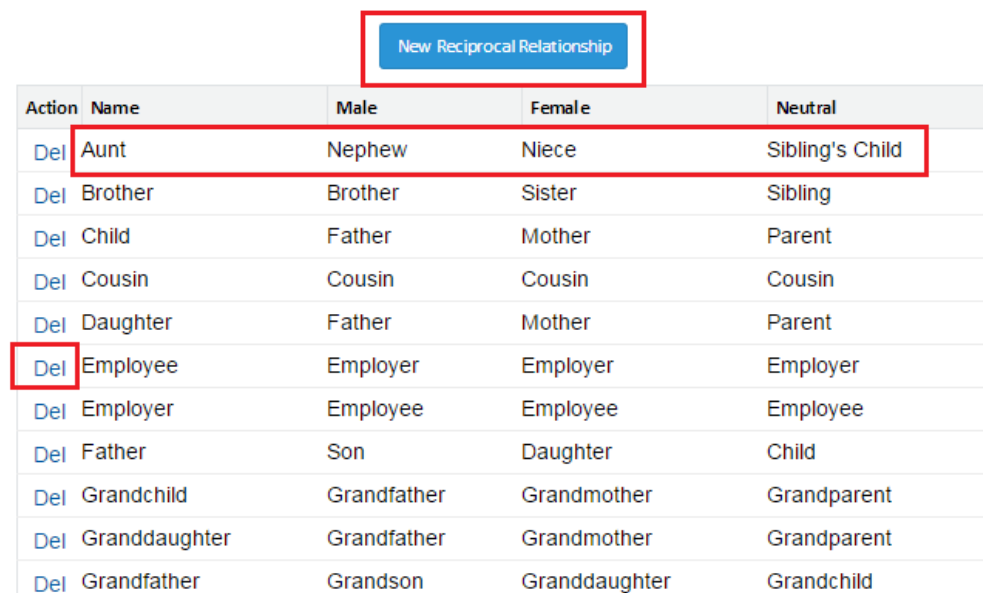
By default, when an auto-created Relationship is triggered, and a Relationship between those Contacts of the same Type already exists, the NPSP will not create a new, duplicate Relationship. You can override this behavior by checking this box and Salesforce will create a new Relationship each time the auto-create is triggered, regardless of any existing Relationships.

Reciprocal Relationships Settings

OK . . . this setting really gets to the heart of the matter. The Reciprocal Relationships “list” is what the List Setting uses to determine reciprocal relationships. (Note that you don't use Reciprocal Relationships settings if you are using the Value Inversion relationship method.)

Here's basically how it works: If Salesforce can determine the contact's gender (based on the user-defined gender field or the salutation), then the reciprocal relationship will be created using the value that matches the gender. If no Gender is specified then Salesforce uses the Neutral value.

For example, line 1 of the below graphic shows that if you create a Relationship from a male Contact record to a Contact whose type is Aunt, the automatic reciprocal relationship will show the male contact as her Nephew. Similarly, if you create the Relationship from a female Contact record to an “Aunt,” Salesforce creates the reciprocal relationship showing the female contact as a Niece. If no Gender is specified on the male or female contact's record, then Salesforce uses the Neutral value, in this case, “Sibling's Child.”



Action	Name	Male	Female	Neutral
Del	Aunt	Nephew	Niece	Sibling's Child
Del	Brother	Brother	Sister	Sibling
Del	Child	Father	Mother	Parent
Del	Cousin	Cousin	Cousin	Cousin
Del	Daughter	Father	Mother	Parent
Del	Employee	Employer	Employer	Employer
Del	Employer	Employee	Employee	Employee
Del	Father	Son	Daughter	Child
Del	Grandchild	Grandfather	Grandmother	Grandparent
Del	Granddaughter	Grandfather	Grandmother	Grandparent
Del	Grandfather	Grandson	Granddaughter	Grandchild

You can add new reciprocal relationships by clicking on the New Reciprocal Relationship button. (See below for details.)

You can delete relationships by clicking on the Del link; doing this does not affect any existing Relationships.

NOTE: If you delete a Relationship from Reciprocal Relationship Settings, you'll also need to delete the picklist value from the Type field on the Relationship object. Otherwise, users will still be able to select the Relationship Type on a record.

Add a New Reciprocal Relationship to the List Setting

To add a new Relationship option, follow these steps:

- Update the Relationship Type Picklist field
- Create the Reciprocal Relationship in Reciprocal Relationships Settings

Update the Relationship Type Picklist field

Before you can create a new Relationship Type, you must first add the value(s) to the Relationship object's picklist field.

1. From Setup, enter Objects in the Quick Find box, then select Objects under the Create menu.
2. Click on Relationship (in the Label column – NOT the Installed Package).
3. Scroll down to the Custom Fields & Relationships section, and click Type.
4. Under Picklist Values, click New.

A small rectangular button with a light gray border and the word "New" in bold black text.

5. Type the new values into the text box, placing each on separate line.

A screenshot of a text box in a software interface. The text box is light gray with a thin border. Inside, the words "Brother", "Sister", and "Sibling" are listed vertically, each on a new line. The text is in a standard sans-serif font.

6. Click Save.

Create the Reciprocal Relationship in Reciprocal Relationships Settings

1. Back at the Relationship Settings tab, under Reciprocal Relationships, click the New Reciprocal Relationship button.

A blue rectangular button with rounded corners and the text "New Reciprocal Relationship" in white, bold, sans-serif font.

2. Fill out the text boxes and click Create Reciprocal Relationship.

Name

Brother

The Name of the Reciprocal Relationship

Male

Brother

The value used if the Contact's gender field matches the values in the Male Custom Label or the Contact's Salutation indicates gender.

Female

Sister

The value used if the Contact's gender field matches the values in the Female Custom Label or the Contact's salutation indicates gender.

Neutral

Sibling

The value used if the Contact's gender field does not match either the Male or Female Custom Labels, and the Contact's salutation does not infer gender.

Create Reciprocal Relationship

Cancel

In this example we are saying that, whenever someone saves a relationship with a Type (Name) of “Brother”:

- If the reciprocal contact is male, create a reciprocal relationship of Brother.
- If the reciprocal contact is female, create a reciprocal relationship of Sister.
- If the reciprocal contact's gender is undefined, create a reciprocal relationship of Sibling.

NOTE: *In this use case, we would normally define two more Reciprocal Relationship Types – one for Sister and one for Sibling – so that Salesforce would know what to do with all new types we've added.*

List Setting Scenarios

The NPSP comes with predefined list settings for some common relationships. Here are some ideas for other common relationships you might want to add.

Siblings

For tracking siblings we suggest that you add these three List Setting entries:

Name	Male	Female	Neutral
Brother	Brother	Sister	Sibling
Sister	Brother	Sister	Sibling
Sibling	Brother	Sister	Sibling

Deceased Spouses

For tracking deceased spouses we suggest that you add these three List Setting entries:

Name	Male	Female	Neutral
Widow	Deceased Spouse	Deceased Spouse	Deceased Spouse
Widower	Deceased Spouse	Deceased Spouse	Deceased Spouse
Deceased Spouse	Widower	Widow	Deceased Spouse

Divorces and Former Spouses

For tracking divorces and former spouses we suggest that you add these three List Setting entries:

Name	Male	Female	Neutral
Ex-Husband	Ex-Husband	Ex-Wife	Former Spouse
Ex-Wife	Ex-Husband	Ex-Wife	Former Spouse
Former Spouse	Ex-Husband	Ex-Wife	Former Spouse

Relationships Autocreation Settings

Auto-created Relationships allow a custom Contact lookup field on the Contact or Campaign Member objects to automatically trigger the creation of a new Relationship type of your choice. For example, you might have a “Referred by” lookup field on the Campaign Member object to represent when a person new to your organization was brought to an event by an existing constituent. Use the Relationships Autocreation setting to have a new relationship automatically established between these two contacts.

Before adding a new Auto-Created Relationship, an administrator must do the following:

1. Create a custom contact lookup field on either the Contact or Campaign Member.
2. Update the picklist values on the Relationship object’s Type field (if they don’t already exist – see the previous sections).
3. Add new Reciprocal Relationships in NPSP Settings (if they don’t already exist – see the previous sections).

Add a New Auto-Created Relationship

Navigate back to the NPSP Settings tab, select **Relationships | Relationships Autocreation**, and click New Automatic Relationship. Then:

1. Select the Object with which you want to make the association.
2. Select the Object Field. The example below shows a “Referred By” custom Contact lookup field, created on the Campaign Member Object.
3. Choose the Type of the Relationship. The reciprocal Type will automatically be created as well.
4. Select the Campaign Types on which this auto-create should fire.
5. Click Create Automatic Relationship.
6. (Optional) Create a new Automatic Relationship for each field that should trigger an auto-creation.

NEW AUTOMATIC RELATIONSHIP

- 1 **Object**

The object this Auto-Relationship is associated with
- 2 **Field**

The field insert or update that triggers the creation of this Relationship
- 3 **Relationship Type**

The Relationship type to be created between the base object and the lookup object. The lookup object will receive the reciprocal Relationship, if one is available.
- 4 **Campaign Types**

- Event
 - Conference
 - Webinar
 - Trade Show

List of eligible Campaign types for this Campaign Member auto-create. (Will be blank for Contact auto-create)
- 5

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



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