

NPSP: Populate Contacts Automatically for New Relationships Viewer Contacts

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- Overview
- Edit Relationships Custom Settings

! IMPORTANT : *This article describes advanced options for customizing NPSP Relationships. Please be careful when using these options, because improper configuration can cause unexpected side-effects in your Relationships records.*

Overview

The Relationships Viewer (<https://powerofus.force.com/articles/Resource/NPSP-Create-Edit-and-View-Relationships###View>) is a tool that lets you visualize the ways Contacts are related to each other in Salesforce. Hovering over a Contact's name in the Relationships Viewer allows you to optionally create a new Relationship. By default, clicking the **Create New Relationship** link does not auto-populate that Contact's name in the Contact field—something users may expect if they're accustomed to creating new records from Related Lists.

This setup step is optional, but if completed will allow you to auto-populate that Contact field in the way other users may expect.

Edit Relationships Custom Settings

To setup auto-population of the Contact field, you'll just need to edit some custom settings.

1. From Setup, enter Custom Settings in the Quick Find box, then select Custom Settings under the Develop menu.
2. Click the letter **R** to narrow down the list.
3. Click the **Manage** link next to Relationship Settings.

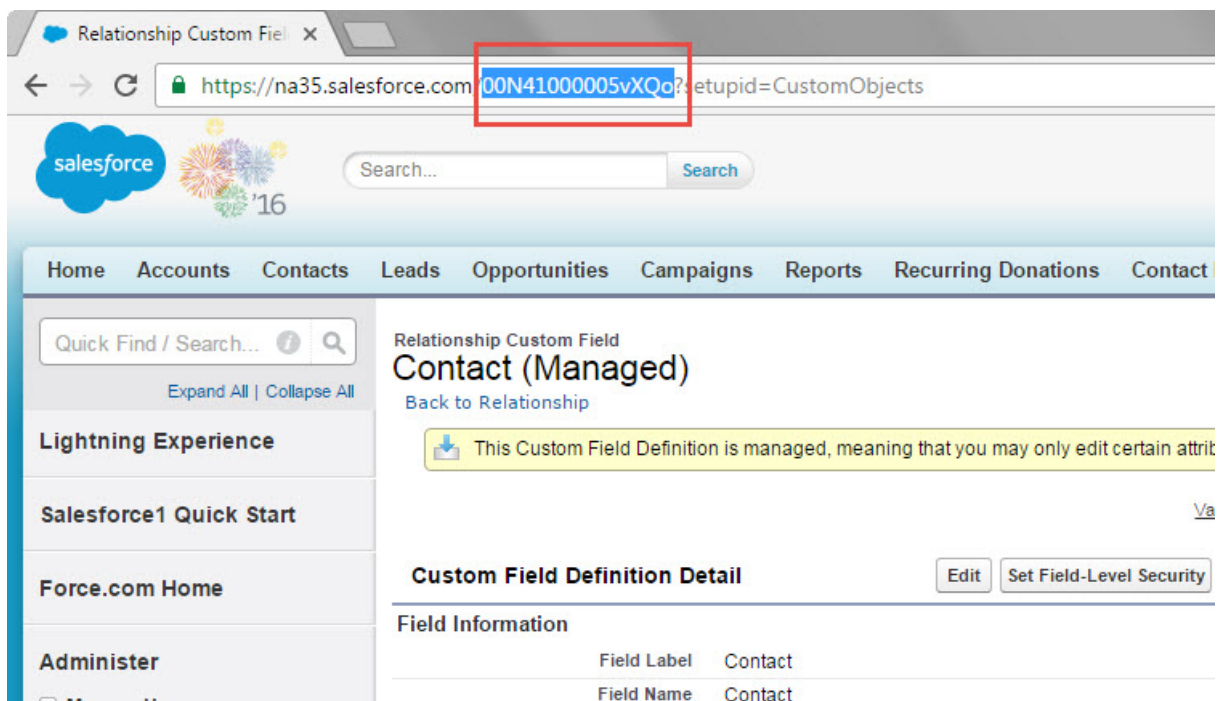
4. Click the **Edit** button.

You can ignore all of these settings except for the last two: Relationship Name Id Field and Relationship Name Id Field Id. (All of the other settings here have been deprecated or their management has been moved to the NPSP Settings tab.)

These two relevant settings are blank by default. The next steps help you locate the correct versions of the ID for the Contact field on the Relationships object. The ID is what tells NPSP where to look when auto-populating that lookup field for new Relationships created from the Relationship Viewer.

Open a new Salesforce tab in your browser. Don't close the tab with the Custom Settings! You'll need it in a few steps.

1. In the new browser tab, click Setup, enter Objects in the Quick Find box, then select Objects under the Create menu.
2. Click on **Relationship** (Label column, NOT Installed Package) in the list of Custom Objects.
3. Scroll down to the Custom Fields and Relationships section and click on Contact (Field Label column).
4. Copy the Contact field's unique Salesforce ID from the URL in your browser. Be sure to grab all of the characters after .com/ but stop before you get to the ?setupid portion of the URL.



5. Go back to the tab you had with the Relationships Custom Settings.
6. Paste this Contact Field ID into BOTH the **Relationship Name Field Id** and **Relationship Name Id Field Id** fields.
7. Modify these IDs as follows:
Relationship Name Field Id: Add the characters "CF" to the beginning of the ID.
Relationship Name Id Field Id: Add the characters "CF" to the beginning of the ID and the characters "_lkid" to the end of the ID.

Make sure your settings look similar to this example. (Your Salesforce ID for the Contact field will be unique to your org):

Relationship Settings Edit

Provide values for the fields you created. This data is cached with the application.

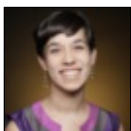
Edit Relationship Settings [Save] [Cancel]

Relationship Settings Information

Location	Heller Consulting
Allow Auto-Created Duplicate Relations	<input type="checkbox"/>
DEPRECATED-Disable_RelCM_trigger	<input type="checkbox"/>
DEPRECATED-Disable_RelContacts_trigger	<input type="checkbox"/>
DEPRECATED-Disable_Relationships_trigger	<input type="checkbox"/>
DEPRECATED-Force Synchronous Auto Create	<input type="checkbox"/>
Gender Field	gender__c
Reciprocal Method	List Setting
Relationship Name Field Id	CF00N41000005vXQo
Relationship Name Id Field Id	CF00N41000005vXQo_lkid

10. When you're finished, click **Save**

To test that this feature is working correctly, try creating a new Relationship record from the Relationships Viewer. If the Contact field is populated with the name of the Contact you started from, you did it!



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