

# Salesforce for Nonprofits Base Camp: Configuring and Customizing

## Hands-On Workshop Guide

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## Agenda

Each Basecamp session includes a hands-on exercise. Today's focus is on how to customize the out-of-the-box features of Nonprofit Success Pack (NPSP) to make work easier for your team.

Together we will:


- Create a new opportunity record type to track our workshop fees in Salesforce.
- Add two new custom fields to the Opportunity object.
- Add a new section for our fields on the donation page layout.
- Create a custom action to create an opportunity record directly from an account record.

## Generate Your Workshop Org

The first thing you need to do is spin up a practice environment.

1. Navigate to <https://sforce.co/BaseCampWorkshop>
2. Wait for the deployer to run. It will take about 10 minutes to generate your org.
3. When the org is ready, click **Launch**. You can safely ignore the error message.

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 Salesforce DX Public Deployer

Deploying sfdo-csg-nonprofit-16428761113258c 100% Complete

**An error occurred while deploying.** See the browser console logs for more information.  
A scratch org was created with username test-9eufuenm9odz@example.com, but the settings failed to deploy

**Note:** It can take up to 5 minutes for the DNS to propagate. If the scratch org doesn't load properly, wait a few minutes to launch.

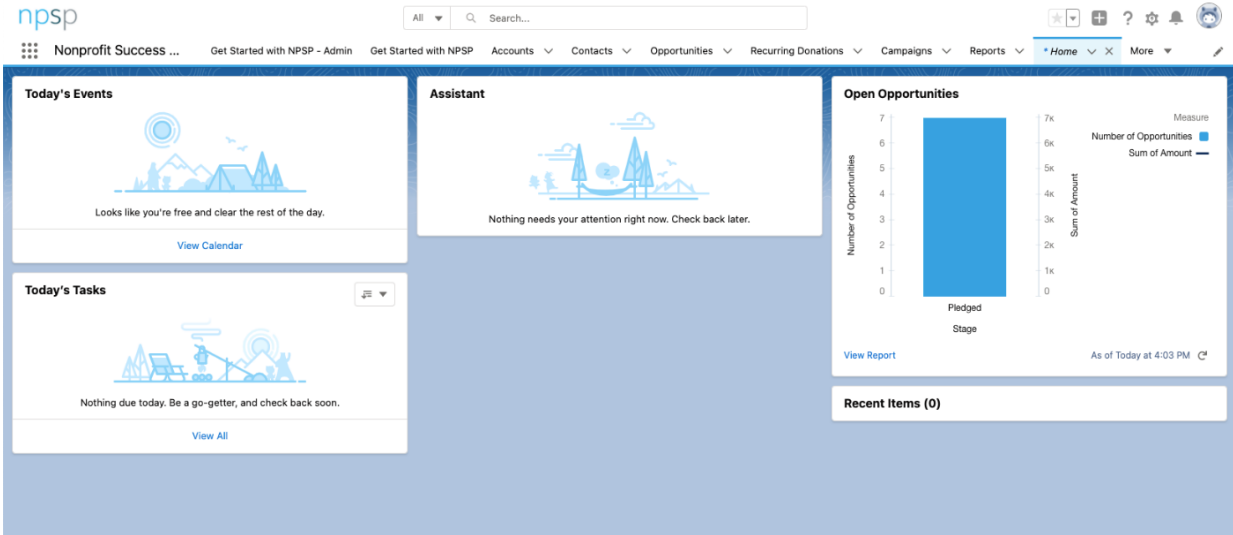
Your org is ready! Delete Launch

**Note:** Use the Launch button above to login for the first time  
The credentials are for other uses (mobile app, integrations).  
They auth to a sandbox (test.salesforce.com) not production (login.salesforce.com)  
These credentials/button will continue working after the session-based Launch button stops.

Your username is and your password is |whg6ubbTnsxd Launch via credentials

## Log In to Your Workshop Org

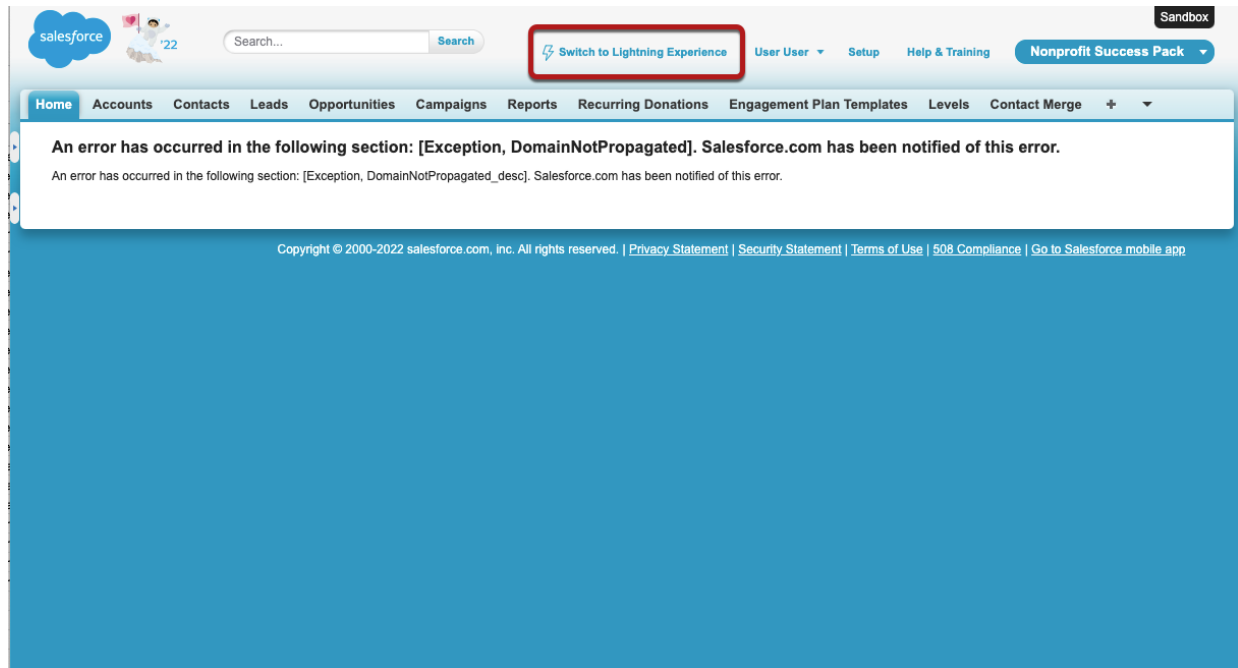
When you launch your workshop, you will begin on a homepage that includes Today's Events and Today's Tasks. Since this is a brand new org, you won't see any tasks assigned to you.



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### What if My Screen Doesn't Look Like That?

If you receive an error upon logging in—such as in the screenshot below—click **Switch to Lightning Experience** at the top of the page.



### Before We Begin

In today's workshop, we'll walk through step-by-step instructions to customize NPSP and Salesforce. For these examples, we begin with NPSP out-of-the-box without any customizations. We provide you with how-to resources at the end of this guide for those who want to learn more.

Let's get started!

### Check Out Your Current Setup

COACH is a (fictional) nonprofit that helps get kids outdoors—and makes sure that adult volunteers have the skills they need. Until recently, COACH was using Nonprofit Success Pack (NPSP) for fundraising only, but the organization would like to bring program revenue from workshops into Salesforce beginning next fiscal year.

This change will take a few modifications to NPSP and the Opportunity object. First, let's review COACH's current Opportunity page layout to see what's already there.

1. Type **Donation** into the Global Search bar at the top of the page.
2. Click **Eamon Bastin Donation 12/19/2022 Annual Campaign - Direct Mail** in the results.

This is a typical Opportunity record. Let's take a tour.

- At the top of the page are the Highlights and Quick Actions.

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- Below the Highlights panel, we see the Details and Related tabs.
  - In the Details tab, we can review all the fields that capture data for this opportunity. Details are drawn from the page layout for the object.
  - In the Related tab, we see related lists, which display records related to this opportunity, such as Contact Roles and Payments (These are covered in more detail in the Entering Donations and Tracking Grants Base Camp session)

Now that we've reviewed, let's start building!

We're going to start with the smallest pieces first (individual fields) and work our way up to creating a separate record type, and then finish off with a simple update to the NPSP settings.

## Start Building

### CREATE NEW CUSTOM FIELDS

COACH wants to capture some simple information on opportunity records about their workshops.

Eventually, they will configure their complete workshop details in Program Management Module (PMM)—which we will cover in the “Implementing the Program Management Module” Base Camp session—but for now, we'll set up a way to track the workshop type and the workshop date on the Opportunity object.

Let's create two fields to do this: a picklist field to track the workshop type, and a date field to track the workshop date and then we'll make sure they are placed correctly on the page layout.

Let's return to the object settings navigation in the Object Manager to create our first field, which we'll call Workshop Type.

1. Click on the **Setup** icon. It's the gear icon at the top of the page.
2. Click **Setup** in the menu.
3. Click the **Object Manager** tab. This will show a list of all of the standard and custom objects in Salesforce.
4. In the Quick Find box on the Object Manager, find and select **Opportunity** by typing in the first few letters and then clicking it in the list.
5. On the Opportunity object, you'll find the object settings navigation to the left. Click **Fields & Relationships**.
6. Click **New**.
7. Choose the field type.
  - a. Scroll down and select **Picklist**.
  - b. Click **Next**.
8. Enter these details about the new custom field:
  - a. Field Label: `Workshop Type`
  - b. Values: Select **Enter values, with each value separated by a new line** and then enter (or cut and paste):

```
Basketball
Baseball
Soccer
Football
```

9. Select **Display values alphabetically, not in the order entered**.
10. Field Name: `Workshop_Type` (This should be filled automatically)

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11. Description: **Picklist field to track the workshop type.**

*Think Like an Admin Tip:* It's always a good idea to fill in these types of descriptions as a note to yourself, even if the field label seems obvious. Trust us. Your future self will thank you!

12. Click **Next**.
13. In Step 3. Establish field-level security - accept the defaults by clicking **Next**.
14. In Step 4. Add to page layouts: Deselect the **Add Field** box at the top. (this will deselect all the fields below)
15. Click **Save & New**.

Now let's create the Workshop Date field.

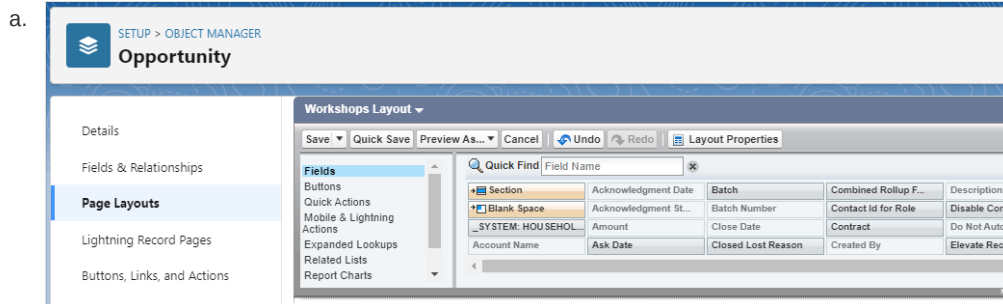
1. Choose the field type.
  - a. Scroll down and select **Date**.
  - b. Click **Next**.
2. Enter these details about the new custom field:
  - a. Field Label: **Workshop Date**
  - b. Field Name: **Workshop\_\_Date** (This should be filled automatically)
  - c. Description: **Date of the COACH workshop**
  - d. Click **Next**.
3. In Step 3. Establish field-level security - accept the defaults by clicking **Next**.
4. In Step 4. Add to page layouts: Deselect the **Add Field** box at the top. (this will deselect all the fields below)
5. Click **Save**.

### CREATE PAGE LAYOUT

Once the fields are created - we need to add them to the page, so our users can see them! Since workshop fees are very different from the existing types of donations, we'll create a new page layout for this type of record.

1. While still on the Opportunity Object page, click on **Page Layouts**
2. Click **New**
3. Enter **Workshop Layout** as the **Page Layout Name**. We'll use the Donation Layout as a starting point, so select that from the **Existing Page Layout** picklist. (If you want to start from scratch, you can leave that as "—None—")

*Think Like an Admin Tip:* This section can be renamed by clicking the wrench icon!



1. Find the new **Workshop Type** and **Workshop Date** fields in the Palette, then drag and drop them in the new **Workshops** section. (You can type "Workshop" in the Quick Find box to quickly locate them)

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2. Finally, let's remove any "Donation" fields or sections that aren't applicable to Workshop Fees.
  - a. When you hover your mouse over a field or section, you can either click and drag it into the field picker at the top of the screen or click the "remove" button on the right.
3. Remove the following
  - a. Fields
    - i. Gift Strategy
  - b. Sections:
    - i. Recurring Donations
    - ii. Tribute Information
    - iii. Matching Gift Information
4. Click **Save**.

### CREATE A NEW OPPORTUNITY RECORD TYPE

Now, let's create a new opportunity record type to track their workshop fees, and we'll attach the new page layout we just created.

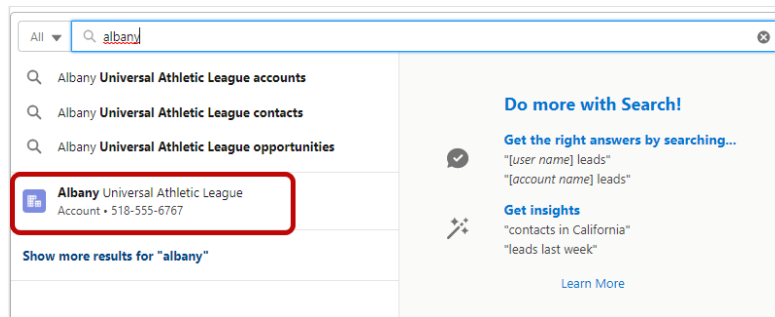
1. While still on the Opportunity Object page, click **Record Types**.
2. Click **New**.
3. Enter the following:
  - a. Existing Record Type: Select **Donation**
  - b. Record Type Label: **Workshop Fees**
  - c. Record Type Name: **Workshop\_Fees** (This should be filled automatically)
  - d. Sales Process: Select **Donation**. A sales process is a filtered list of stages available for a user to select when they create an opportunity. You can use an existing sales process, or create a new one if you need a different selection of opportunity stages.
  - e. Description: **COACH workshop fees**
  - f. Active: **Selected**
4. Select the **Make Available** checkbox in the header row of the profile selection box to make this record type available to all profiles. Note that this isn't a security setting—a user may be able to see a record even if they do not have permission to create records with that record type.
5. Click **Next**.
6. Select the page layout that users with this profile see for records with the record type. We would probably want to eventually create a custom layout for this record type, but for now, we will use an existing layout.
  - a. Select the **Apply one layout to all profiles**, the default.
  - b. Select the **Workshop Layout**.
7. Click **Save**.

### Test Your Work: Create a New Workshop Opportunity Record

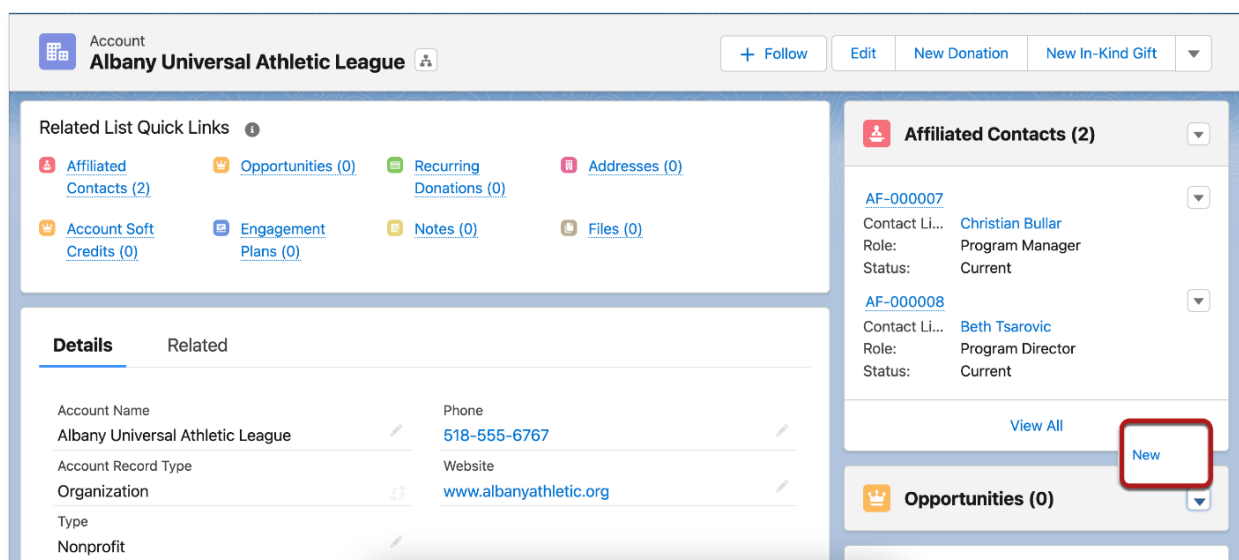
Let's give our new Workshop record type a try by entering a new workshop from an account record!

1. In the Search bar at the top of the screen, enter and select **Albany Universal Athletic League** to open its Account record.
  - 2.
-

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3. Navigate to the **Opportunities** related list (single) on the right-hand side of the page. You may need to scroll down a little.
4. Click drop-down arrow and select **New**



5. Notice our new **Workshop** record type now appears at the bottom of the list. Woot! Select **Workshop** and **Next**.
  - a. For **Opportunity Name** type New or any other value. When we save the record, the **Opportunity Name** will be overwritten with the automatic opportunity name we set in **NPSP Settings**.
  - b. Close Date: Enter today's date.
  - c. Stage: select Closed Won.
  - d. Amount: 500
  - e. Workshop Date: Enter a date a month or so in the future.
  - f. Workshop Type: **Soccer**
6. Click **Save**.

We've successfully added a new Record Type to our Salesforce instance to allow our users to track Workshop fees!

## Optional Enhancement: Create a New Opportunity Naming Convention

One of the required fields on the Opportunity object is Opportunity Name. Many nonprofits use this field to capture some basic

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information about the donor, amount, close date, and campaign—which is tedious to enter for each donation or opportunity. Fortunately, we can set up automatic naming for opportunity records to make it easier for users and ensure more consistent data. To do this, we'll head to NPSP Settings, the command central for many of the options for NPSP.

1. Click the **App Launcher** icon. (9 dotted-grid in the upper left corner)
2. Using the *Search apps and items...* box, find and select **NPSP Settings** by typing in the first few letters and then clicking it.
3. After it loads, click **Donations** in the Nonprofit Success Pack Settings menu.
4. Click **Opportunity Names**.
5. Click **Edit** in the Organization\_Donations row.
6. Choose Opportunity Name Format: `{!Account.Name} {!Amount} {!RecordType.Name} {!CloseDate}`
7. Choose a Date Format relevant to your region.
8. Click **Save**.

We recommend you check our NPSP Settings in your org when you get a chance. There's a lot there!

## Optional Enhancement: Add an Action to the Account Layout

We don't have time to cover this during today's workshop, but we're including these instructions so that you can create a Quick action to streamline data entry for your users.

Our new opportunity record type is now available for use. But creating a new record isn't ideal. Users would have to wade through a lot of unnecessary fields on the donation page layout just to enter a few workshop details.

The COACH staff knows their workshops are only purchased by schools, nonprofits, and other institutions—not individuals. So, they would be related to account records, not contact records.

Let's create a custom action on the account page layout so users can quickly add a new workshop to the records we use to track institutions.

1. Go to Setup by clicking the **Setup** gear icon and then **Setup**.
2. Click the **Object Manager** tab.
3. Find and select **Account** from the list.
4. On the object settings navigation, click **Buttons, Links, and Actions**.
5. Click **New Action**.
6. Enter this information:
  - a. Action Type: **Create a Record**, the default
  - b. Target Object: **Opportunity**
  - c. Relationship Field: **Account Name**
  - d. Record Type: **Workshop**
  - e. Standard Label Type: **—None—**, the default
  - f. Label: `New Workshop Fee`
  - g. Name: `New_Workshop_Fee` (This should be filled automatically)
  - h. Description: `Creates New Workshop Fee records from the Account`
7. Click **Save**.

Now the page displays the layout for our new action with some default values. We're going to remove some fields and add



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some others.

1. Highlight and click on the **Opportunity Name** field. Click the circle with a line through it—it kind of looks like a *Do Not Enter* street sign—to remove it.
2. Repeat this action to remove the **Account Name** and **Next Step** fields.
3. In the Quick Find box in the Palette, type in **Workshop** to find our new fields.
4. Drag and drop the **Workshop Date** and **Workshop Type** fields into the action layout.
5. Click **Save**.
6. You'll see a warning that we removed a required field—Opportunity Name—from the page layout, and that we need to either add it back to the layout or provide a default. We're going to provide a default value next, so click **Yes** to continue saving.

Now let's create predefined values for the Opportunity Name, Close Date, and the Stage fields.

Let's start with the Opportunity Name field.

1. In the Predefined Field Values list, click **New**.
2. Fill in this information:
  - a. Target Object: **Opportunity**, the default
  - b. Field Name: **Opportunity Name**
  - c. Formula Value: **"Workshop"**, including the quotes. We already set up how we want our opportunity to be named in NPSP Settings, so it will overwrite whatever we put in here.
3. Click **Save**.

Now, for the Close Date field:

1. In the Predefined Field Values list, click **New**.
2. Fill in Field Information:
  - a. Target Object: **Opportunity**, the default
  - b. Field Name: **Close Date**
  - c. Formula Value: **Today ( )**, including the parentheses.
3. Click **Save**.

Now, for the Stage field:

1. In the Predefined Field Values list, click **New**.
2. Fill in Field Information:
  - a. Target Object: **Opportunity**, the default
  - b. Field Name: **Stage**
  - c. Specific Value: **Closed Won**, because these are almost always entered when the participant has committed to the workshop.
  - d. Formula Value: Leave this field blank.

Now that we've created our new action, we need to add it to the Account page layout.

1. On the object settings navigation, click **Page Layouts**.
2. Click **Organization Lightning Layout**.
3. Scroll down to the **Salesforce Mobile and Lightning Experience Actions** section.
4. Return to the Palette editor at the top of the page and click **Mobile & Lightning Actions** settings.

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5. Enter **Workshop** in the Quick Find box.
6. Drag and drop the **New Workshop Fee** action to the beginning of the **Salesforce Mobile and Lightning Experience Actions** list. It should be before Edit.
7. Click **Save**.

## Resources

- [NPSP Documentation: Add or Edit a New Opportunity Button on Contact](#)  
(Note that in our example today we added a button to Account, but the process is the same.)
- [Trailhead: Data Security](#)
- [Trailhead: Lightning Experience Customization](#)
- [Trailhead: Custom Fields Quick Look](#)