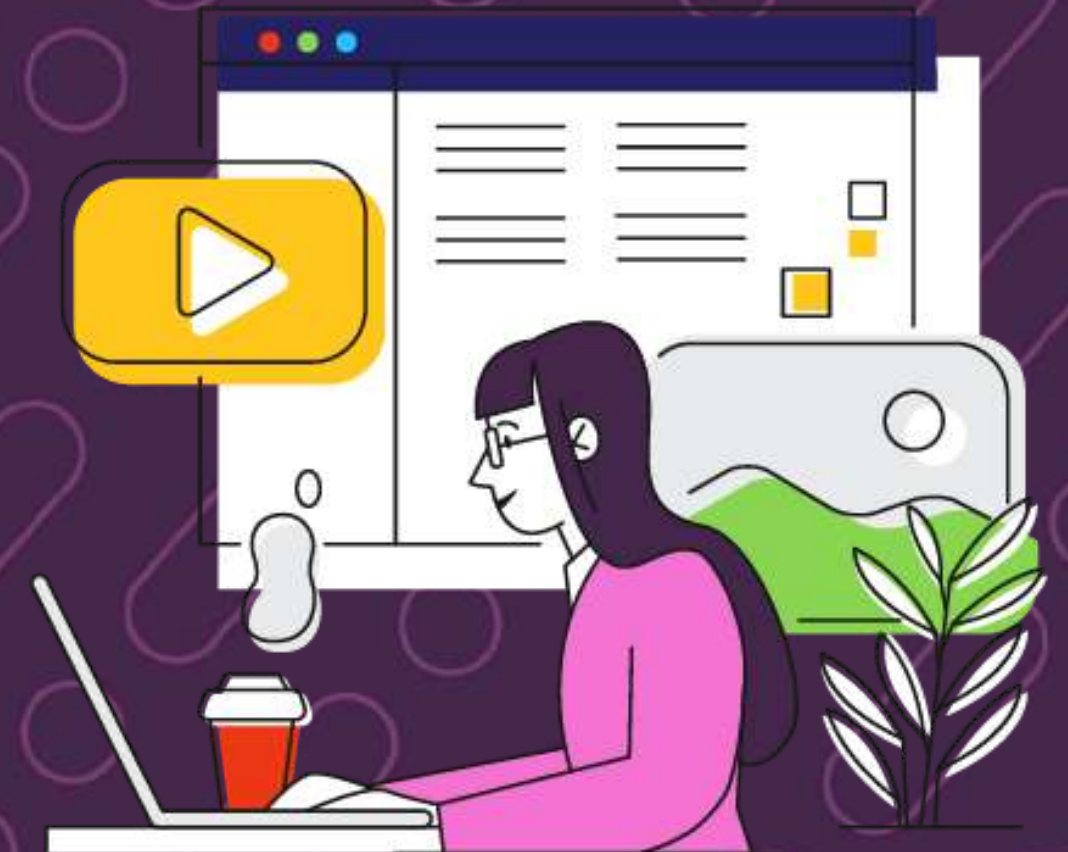Case Study

International NGO Humanitarian Organization: Eradicate Affiliation Contact without Affiliation Permanently

The Client

The client's mission is to improve the humanitarian system to save even more lives. This network of over 80 non-governmental organizations, from big international to local ones, are working together to address the problems in the humanitarian sector, like centralized power and decision-making and the resistance to a much-needed change.

The Project

The Client's Request

- Salesforce's NPSP comes with the default Automatic Affiliation Management setting.

- It automatically creates an Affiliated Contact once a Contact record is created.

- It is also how the client configured the NPSP setting.

- Therefore, there were lots of Affiliated Contacts created without any role/Function or any affiliation.

- So, they asked Application House to help them display only the Affiliated Contacts that have affiliation or Role/Function.

What is Affiliated Contact?

Affiliation on Salesforce refers to the relationship of a Contact with an Account. In NPSP, the affiliations track the association of individuals (the Contacts) with the Organization Accounts. It includes their present involvement with their organization, their employment history, and their volunteer experiences.

An Affiliated Contact record includes a Role/Function field, which describes the contact's role or affiliation with the organization.

The Problem

- An affiliated contact with a role/function record is important when working with the organization.

- So, if the Role/Function is empty, the record doesn't have much use because the role/function is what defined affiliation between contact and account.

- This means that simply filtering what to display isn't addressing the actual problem.

- The real problem is the continuous creation of affiliated contacts that have no Role/Function.

The Solution

The Application House Process

- The client asked Application House to complete a task that they saw was the solution to their problem.

- That is to filter out the affiliated contacts, displaying records only the ones with the Role/Function.

- But we recognized that this request didn't eradicate the problem from the roots.

- Selecting what to display does not stop users from continuously creating new affiliated contact records with empty Role/Function fields, which is not efficient and creates lots of records that take up data.

- As such, the Application House team decided to get to the core
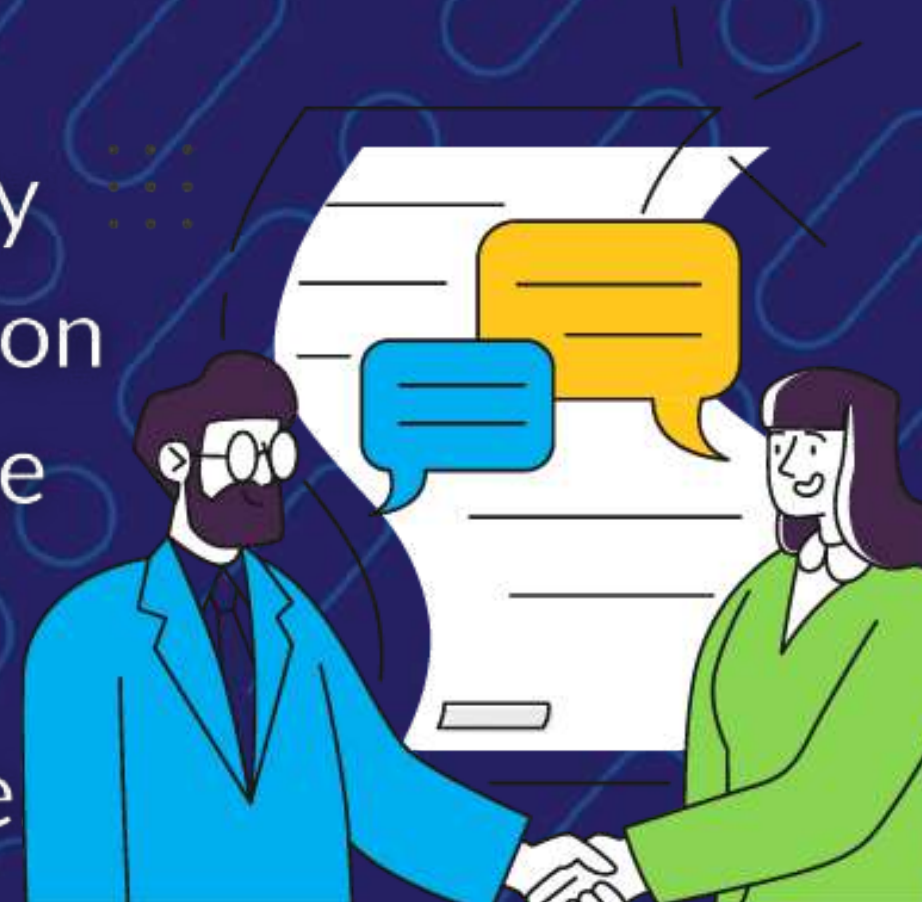
The Application House Process

1. First, we turned off the Automatic Affiliation Management setting to stop the system from automatically creating affiliated contacts.
2. Since someone can still manually create affiliated contact and leave the Role/Function field empty, to solve it, this field must be mandatory. There are two ways to do this: (1) create a validation rule or (2) make field required value on the layout. Application House chose to make the field required on the layout.
3. Next, we deleted the affiliated contact records with no Role/Function because they were incomplete and unnecessary. Of course, we communicated this with the client and showed them all the records to be deleted. Once we received their approval, we proceeded with the deletion.

The Results

- With the implemented solution, one can't create an affiliated contact record if the Role/Function field is empty.

- By making this mandatory, the client is now building a clearer record.

- Therefore, more effective at helping them achieve their goals.

Client Feedback

"The Application House team was a great help to our organization, worked quickly and efficiently, and suggested new solutions and approaches to our processes. We were overall very happy working together!"

Project Review - Salesforce Verified

Available on AppExchange : https://appexchange.salesforce.com/appxConsultingListing Detail?listingId=a0N4V00000G6nevUAB&legacy=true)

The Application House Value

- Perhaps the greatest value that Application House showcases in this project is our dedication to giving you the best solution to your problem.

- Our team could've done just what was requested, but we knew it didn't solve the problem.

- As your Salesforce Partner, we are on a mission to deliver true solutions that give you the best of Salesforce.

- To do that, we address a problem from its roots so that it won't appear again or cause other issues.

The Application House Value

Application House completed the project by changing settings in NPSP. It takes genuine expertise to know that the best solution doesn't have to be the most sophisticated. We knew that using the settings was the most effective and efficient, and because of that, we accomplished the task in a timely and cost-efficient manner.

Services that Application House offers

- BAU development

- Manager service or support service

- Offshore & Onshore team presented in the continents: Europe, North America, & Asia (India and Philippines).

- Greenfield project development

- Salesforce developer, Salesforce admin with developer capabilities, Salesforce business admin, and Salesforce architect.

- Ad hoc short-period support to fill the emergence gap.

- Project length ranges from one month or six months or 12 months.
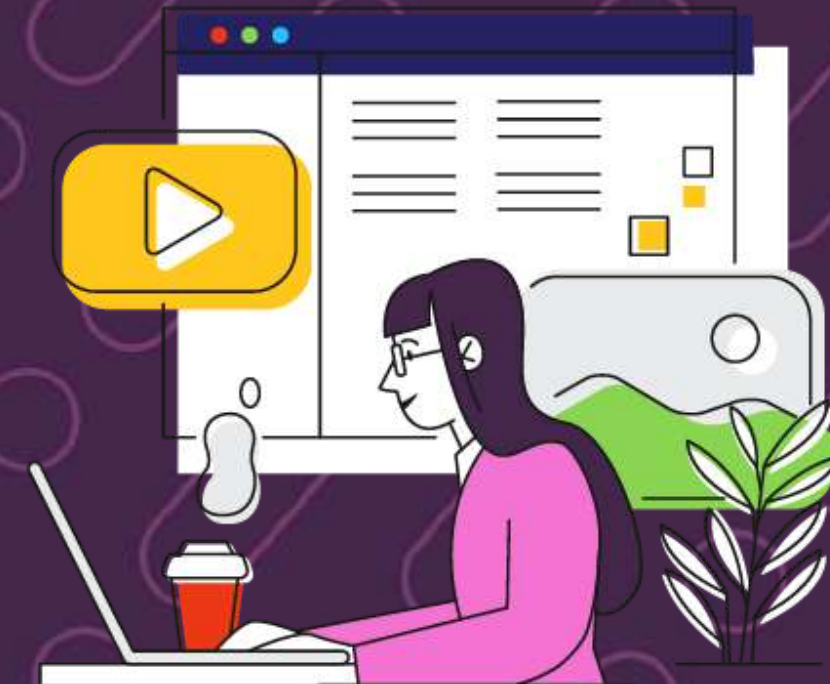
The Application House Team

Application House members are proficient in various facets of IT, and all share one goal: to get you the best solutions. Our team includes:

Salesforce Developer:
Experience with more than 10 hands-on experiences with Salesforce trigger, custom component development using Apex controller, Visualforce page, and Lightning Web Components. Developed complex integration to batch apex.

Salesforce Senior Developer:
Hands-on experience developing code using design patterns, complex trigger and platform events, and managing and mentoring teams. Extensively work with Stakeholders to fulfill their BAU needs.

The Application House Team

Salesforce Business Analyst:

Expert in writing User Stories with Gherkin format who is an expert in Stakeholder communication and making a bridge between developer and business.

Salesforce Technical and Solution Architect:

Salesforce Architect who worked at Salesforce and British Petroleum Company plc multinational company. Grew from Salesforce consultant to developer to senior developer to technical and solution architect implementing Salesforce sales, service, experience, CPQ, Non-profit, and Education cloud.

Wider industries experience ranges from Enterprise Java development to Microsoft .NET development to Embedded system development to Salesforce development experience.

Application House's Clients & Global Presence

United Kingdom ,United states,
India, Philippines & Australia

Start Your Successful Salesforce Journey With Us!

Application House is the helping hand you need to scale your Salesforce, so it matches your future needs. We'll provide you with the right solutions so you can focus on pursuing your missions.

Client company names can be shared on request.

Book a consultation call now or send us an email at sales@applicationhouse.com for any inquiry.