

Case Study

**Child Advocacy Organization:
Automate Household or Organization
Accounts creation when new
Contact is created in NPSP**

The Client

More and more children become subject to different kinds of abuse daily. The client is educating the world on this global problem and advocating for children; For their rights and safety.

As a children's advocacy organization, the client believes that all children should be loved, safe, and protected. To do that, for fifty years, the organization has been collaborating with communities and families to prevent and reduce the impact of child abuse. Together, they raise awareness, support, collaborate, and advocate to build the best future for every child.

Project Background

The client uses Salesforce's NPSP (Nonprofit Success Pack) to help run its operations. Made and created by Salesforce.org, it is a set of managed packages that is free through the Salesforce AppExchange. These packages contain functionalities that allow nonprofit organizations to help enhance their processes.

Project Background

Organizations can store information on individuals and organizations they work with as contact and account records. Contact records information on individuals, while account records information on businesses an organization works with. A contact record needs to have a parent account record.

The client works with parents and children whose information is recorded as contact and to a household account. The donors or individual is represented as a Household account and the organization is represented by an organization account. The individuals belonging to the organizations are affiliated contacts.

Problems

A contact record has a corresponding account record created on Salesforce. In Salesforce NSPS, a Household Account is automatically created when a contact record is created. It's the default account model in the package, so the client's government organization account is also created as a Household account, especially for the organizations they work with.

The Application House Process

The Initial Idea

To solve the problems, the client sought the help of Application House's Salesforce Architect. It was the most obvious solution to use Flow which is the default feature of the Salesforce platform to create a parent Account record for child Contact.

Therefore, normally Salesforce Admin/Developer would have implemented a solution like this:

- New Screen Flow implementation that automatically creates an account record for a contact record.
- A Screen Flow will add a condition wherein the screen will prompt a series of questions or fields to be filled out, including the account name.
- It will require turning off the Household setting and other settings in NPSP so that system will not automatically create a Household account.

The Cons of this Solution

If one Salesforce instance uses too many resources, it could slow down the execution of the shared systems of other Salesforce instances. So, to ensure balance, Salesforce has set limits.

Creating Flow is adding unnecessary system resources that can be done without it. Over time the number of flows gets increased which is unnecessary because those changes can be implemented without flow.

Getting To the Core of The Problems

Application House didn't want to implement Flows when it was not necessary, so our Salesforce Architect dug deeper to find the most efficient solution. We made use of the NPSP settings, and here's how it went:

1. Set the default Organization Account Record Type in the profile for users who are creating Organization Account, and Household Account Record Type for the user creating Household Account.
2. Set --None-- in Household Account Record Type in the Nonprofit Success Pack Settings for People-Account Model.

Getting To the Core of The Problems

3. Created a new free text field on the contact record called “Custom Account Name (API Name: Custom_Account_Name__c)” on top of the default Account Name field.
4. Then change the NPSP's People - Household Settings, putting the new field's name in the Household Name Format option:
“{!Custom_Account_Name__c}”.
5. Now, when Safe & Sound creates a contact, the account record takes the name of whatever it is they have put in the Custom Account Name field and the user's default record type that was set in their profile.

The Results

- When Safe & Sound creates a contact, it's not just a household account created but they can create an Account with an Organization record type.
- They can put the appropriate organization (Account) name.
- They can start building cleaner, more organized, and accurate contact and account records, which is better so they can collaborate with their partners on their mission: to better the lives of children.

Client Feedback

“Application House’s Salesforce Architect did an incredible job with coming up with ideas to address our issue. He listened patiently (not many consultants do that!) and advised on a solution. His communication is quick and prompt. Highly recommend using his Salesforce consulting service!”



Project Review - Salesforce Verified

Available on AppExchange : <https://appexchange.salesforce.com/appxConsultingListingDetail?listingId=a0N4V00000G6nevUAB&legacy=true>

The Application House Value

Salesforce's best practice to use declarative solutions means choosing the clickable solutions, like the default Salesforce platform feature, then a declarative framework like Flow, before even considering coding. For this project, however, there was a simpler and more efficient solution than Flow. That's the principle that Application House's Salesforce Architect followed and used NPSP settings, when necessary, instead of implementing unnecessary flow.



The Application House Value

Our architect identified how to navigate the settings and give the desired results. How? Because the Application House team knows Salesforce NPSP to the core, we were able to make the changes. The founding principle of Application House is to build a strong foundation, which showcases true expertise by knowing the best solution doesn't always have to be complicated.

The best one would be the most efficient solution. That is what Application House provided when we opted for NPSP settings rather than unnecessarily using resources like Flow.

The Application House Value

Regardless of how powerful Salesforce is, if it's not implemented or managed right, then it will only eventually cause problems. That's why finding a consulting partner that truly knows Salesforce is crucial. Because you then have a consulting partner who can implement things correctly, which allows your platform to grow with you. That's who Application House is.

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 to six months to 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 Salesforce Certification

Admin Certifications



Architect Certifications



Consultant Certifications



Developer Certifications



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.



CONTACT US

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.