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Householding in Salesforce

Audience:	Nonprofits
No. of Custom Objects:	1
No. of Custom Tabs:	1
Time to Implement:	30 minutes
Level of Difficulty:	Easy

The use of households in CRM allows individuals to be grouped as a single entity. Those individuals may act independently, and have those activities aggregated when necessary. An example:

> Two donors to an organization each give money to an organization's annual fund. These donors happen to be married and live at the same address. The development director would like to send one thank you letter to the couple, acknowledging their combined contribution to the organization. This task can be accomplished by generating the thank you letters based on household, and aggregating the gifts of all members of the household into a combined giving total.

Many nonprofits use households in their CRM activities. This paper will present one way to handle households in the online CRM system Salesforce.com.

Limitations of Salesforce.com in Working with Individuals

Salesforce.com was built with an underlying bias to Business to Business (B2B) interactions. While nonprofits engage in B2B activities (grant applications, projects on contract, etc.) they also rely heavily on Business to Consumer (B2C) interactions in the form of individual giving programs. Because Salesforce.com is not built to handle B2C interactions, a work around is necessary. Currently there are two main work arounds for B2C:

1. Each individual in Salesforce.com has a Contact and an Account created for them.
2. Individuals that are not affiliated with a company have a Contact created that is tied to a single Account specifically reserved for these individuals.

This method of Householding applies to work around #2. It could be modified to support work around #1, but I have not pursued that avenue.

To implement this method of Householding in support of Contacts in an Individual catch-all Account, follow the instructions below.

Creating New Custom Objects

New objects are created by clicking:

Setup >Build >Custom Objects >New Custom Object

Household Object

The Household object will connect multiple contacts together in a Household. It can be used to handle all recognition and mailing functions for individual donors, if you so choose.

Create a new custom object with the following values:

Attribute	Value
Singular Label	Household
Plural Label	Households
Object Name	Household
Description	Object to represent a collection of people at a single physical address
Record Name	Household Name
Data Type	Text
Enable Reports	Yes
Track Activities	No
Launch Custom Tab Wizard	Yes

Create a tab for **Household**.

Add the following custom fields to the **Household** object:

Field Label	Data Type	Values	Default
City	Text(255)	NA	NA
Country	Text(255)	NA	NA
Recognition Name	Text(255)	NA	NA
Recognition Name – Short	Text(255)	NA	NA
State/Province	Text(255)	NA	NA
Street	Long Text Area(500)	NA	NA
ZIP/Postal Code	Text(10)	NA	NA
Do Not Mail?	Checkbox		False

Note: Add any other custom fields that you would like to apply to Households.

Update the Search Layout to the following:

Layout	Columns Displayed
Search Results	Household Name
Lookup Dialogs	Household Name
Households Tab	Household Name

Create a Page Layout for **Household** as follows:

Information	
Household Name	Owner
Street	Recognition Name
City	Recognition Name – Short
State/Province	Do Not Mail?
ZIP/Postal Code	
Country	

Modifying Existing Objects

Modify existing objects by clicking:

Setup >Customize > [Name of the object to be modified]

Contact Object

Add the following custom fields:

Field Label	Data Type	Values	Default
Household	Lookup(House hold)	NA	NA

Modify the Page Layout for **Contact** to show the Household relationship lookup field. You can hide all mailing information on the Contact if you desire. The Household object can be used to handle all mail-base communications.

How it Works
- A **Household Object instance** is created for each household. If a Contact does not live with another Contact, a **Household** is still created.
- All **Contacts** in that **Household** are associated to the **Household object instance**.
- Mailing preferences for that **Household** are set on the **Household object instance**
- **Opportunities** (donations) are associated with **Contacts** via **Contact Roles**.
- Recognition Name is used to address the Household. It would be something like, "Bob and Sue Jordan," or, "The Sanders Family."

Reporting
- All reporting that requires mailing address should be done using the **Household** object. It is available for **Contact** and **Account** reports, as well as **Opportunity** reports.
- Mailings, thank you letters, etc. are only sent to **Households**.

Future
- Some UI customization to allow for simultaneous Contact and Household creation would be nice

- Salesforce.com is probably working on B2C functionality that will at some point probably include Householding. Other industries do B2C and Householding, so they likely have a reason to solve these problems.