

# NPSP Trial Updates

8/12/2020

*The purpose of this document is to detail high level updates that will be completed in the NPSP Trial in order to create a more simplified and cohesive experience for new customers.*

## Object Updates

### Account

- Updated Compact Layouts to focus on important Account fields
- Page Layouts reviewed and updated to ensure they included relevant fields and showcased important Account information
- New Custom Quick Actions for fast and easy Donations entry

### Contact

- Updated Compact Layouts to focus on important Contact fields
- Page Layouts reviewed and updated to ensure they included relevant fields and showcased important Contact information
- New Custom Quick Actions for fast and easy Donations entry
- Updates to default picklist values and order to eliminate confusion for new Admins
- Field History Tracking enabled/updated

### Opportunity

- Updated Compact Layouts to focus on important Opportunity fields
- Page Layouts reviewed and updated to ensure they included relevant fields and showcased important Opportunity information
- Updates to default picklist values and order to eliminate confusion for new Admins
- Simplified sales processes with paths
- Field History Tracking enabled/updated

### Campaign

- Updated Compact Layouts to focus on important Campaign fields
- Page Layouts reviewed and updated to ensure they included relevant fields and showcased important Campaign information
- New Sample Campaign records added to provide examples for new Admins
- Updates to default picklist values and order to eliminate confusion for new Admins
- Field History Tracking enabled/updated

### Address

- Updated Compact Layouts to focus on important Address fields

- Page Layouts reviewed and updated to ensure they included relevant fields and showcased important Address information

## **Permissions, Settings, Look and feel**

- Global Quick Actions updated
- Cleanup of deprecated objects
- Review of layouts to ensure consistent look and feel
- Updated search layouts
- Updated permissions to reports allowing all user types to view available reports
- Updates to common NPSP Settings to set a new Admin up for success including:
  - Household Settings
  - Address Settings
  - Payment Settings
  - Contact Role settings