



## Create a custom “New Membership” button for Contacts

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### Set up a New Contact Membership button on the Opportunities object.

It is important to note that these instructions will only work for donations generated on the Contact screen, and you have to create a separate button to work off of the Accounts screen.

These instructions assume you have all membership fields set up on your Opportunities (Donations) page layout.

**1. Create Button.**

Your Setup->Build->Customize->Opportunities->Buttons, Links and Actions

**Build**

- Customize**
  - Tab Names and Labels
  - Home
  - Activities
  - Campaigns
  - Leads
  - Accounts
  - Contacts
  - Opportunities**
    - Fields
    - Validation Rules
    - Triggers
    - Contact Roles
    - Competitors
    - Page Layouts
    - Field Sets
    - Compact Layouts **New!**
    - Search Layouts
    - Buttons, Links, and Actions**
    - Sales Processes
    - Record Types
    - Limits
    - Big Deal Alert
    - Update Reminders
    - Settings
    - Similar Opportunities

## 2. Click “New Button or Link”

Buttons, Links, and Actions  
**Opportunity**  
 Use this page to manage buttons, links, and actions.

**Buttons, Links, and Actions** New Action **New Button or Link** Default Custom Links

Action	Label	Name	Description
--------	-------	------	-------------

- a. **Label:** New Contact Membership
- b. **Name:** auto-generated
- c. **Description:** A button to generate a new membership / renewal off of a CONTACT screen
- d. **Display Type:** List Button (uncheck “Display Checkboxes”)
- e. **Behavior:** Display in existing window without sidebar or header
- f. **Content Source:** URL

Opportunity Custom Button or Link  
**New Button or Link**

**Custom Button or Link Edit** Save Quick Save Preview Cancel

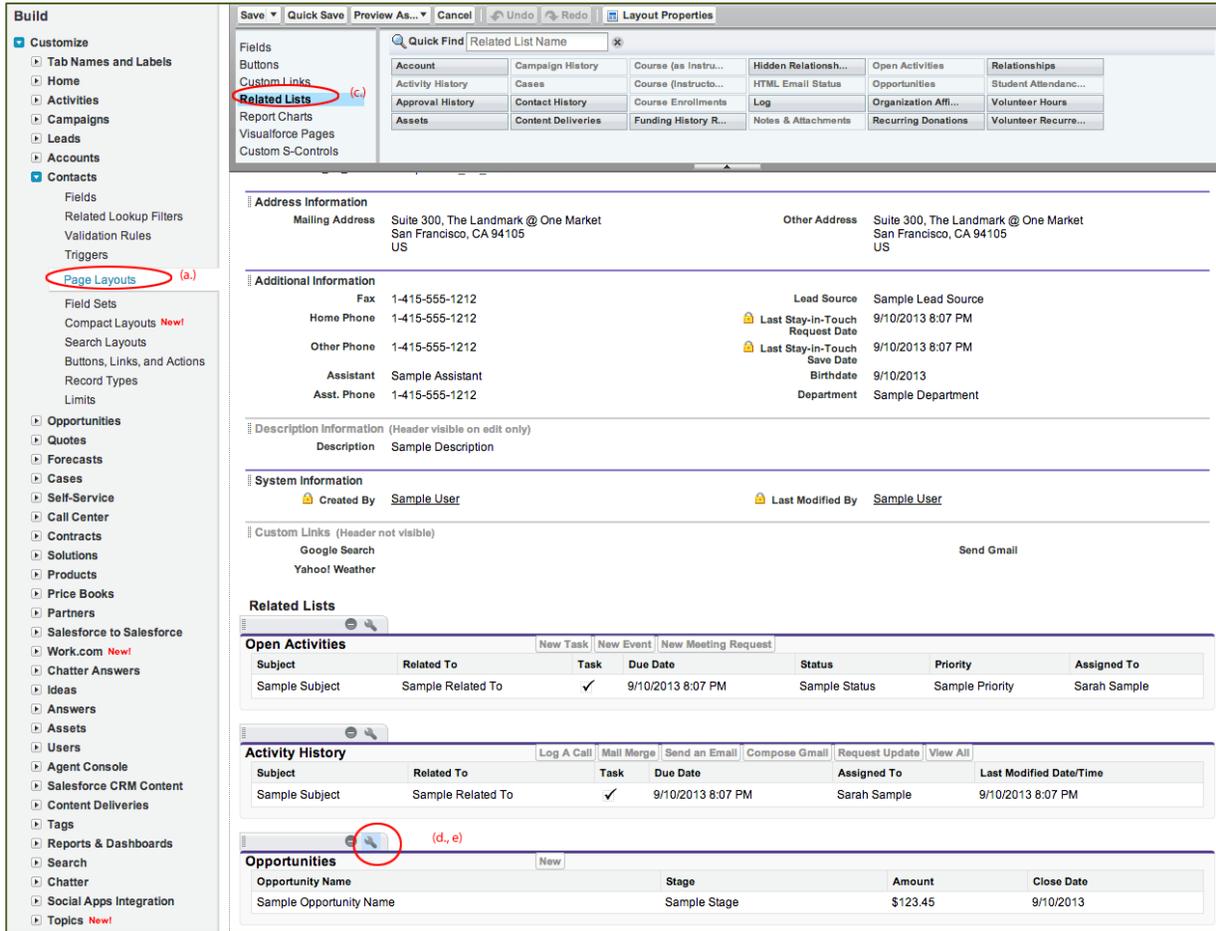
**Label**   
**Name**  [i](#)  
**Description**   
**Display Type**  
 **Detail Page Link** [View example](#)  
 **Detail Page Button** [View example](#)  
 **List Button** [View example](#)  
 **Display Checkboxes (for Multi-Record Selection)**  
**Behavior**  [View Behavior Options](#)  
**Content Source**

3. Copy and paste one of the links from the scenarios given below or build your own!

4. Save.

5. Add the button to your Contact Layout / Donations Related List

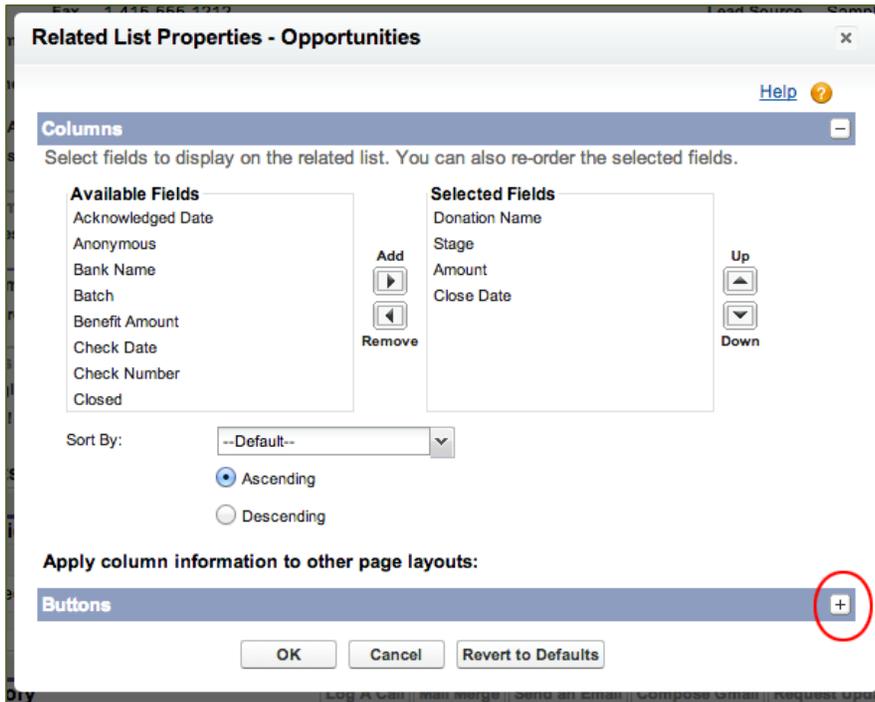
- a. Your Setup->Build->Customize->Contacts->Page Layouts
- b. Edit the appropriate page layout
- c. Click "Related Lists"
- d. Look for Donations (or Opportunities)
- e. Click the wrench icon to bring up Related List Properties



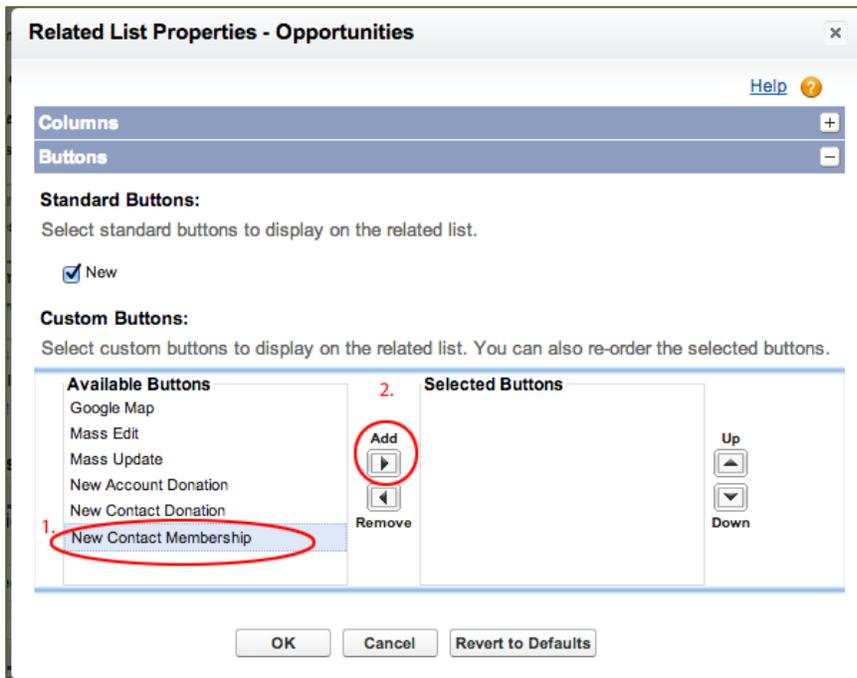
The screenshot shows the 'Build' pop-up menu on the left, which is used to customize the record page. The 'Related Lists' option is circled in red and labeled '(c)'. The 'Page Layouts' option is also circled in red and labeled '(a.)'. The main area shows a record detail view for a contact, with sections for Address Information, Additional Information, Description Information, System Information, Custom Links, Related Lists, Open Activities, Activity History, and Opportunities. The 'Related Lists' section is circled in red and labeled '(d., e)'. The 'Opportunities' table is shown below.

Opportunity Name	Stage	Amount	Close Date
Sample Opportunity Name	Sample Stage	\$123.45	9/10/2013

f. Click the + next to “Buttons” at the bottom of the pop-up



g. Add “New Contact Membership” and click OK



h. Save the Page Layout



### URL OPTIONS AND DISECTION:

The full URL that you paste into the new button will need to be changed to reflect your unique information. This section details each part of the URL's provided, and gives you guidance on what each section is intended to do and how to find the right information from your organization

**Scenario 1** - This link assumes that the start date is always today and the end date is always set to a specific date, in this case, January 1, the following year. This button populates Opportunity Name, Stage, Close Date, Start and End Dates.

**Copy and paste the following into the text box.** Areas that you will have to change are highlighted and link to detailed descriptions of how to interpret and change the information to get it to work in your environment.

```
/006/e?lookupcmpgn=0&retURL=%2F{!Contact.Id}&accid={!Account.Id}&conid=
{!Contact.Id}&RecordType=012o0000000b5Dg&ent=Opportunity&opp3={!Contact.Name}-
%20Dues%20{!Year(Today())}&opp11=Posted&opp9={!TODAY()}&00No0000004Hou3=
{!TODAY()}&00No0000004Hou1=01%2F01%2F{!TEXT(YEAR(TODAY()+1))}
```

**Link breakdown:** replace all unique fields with merge fields or field ID's

```
/006/e?
lookupcmpgn=0
&retURL=%2F{!Contact.Id}
&accid={!Account.Id}
&conid= {!Contact.Id}
&RecordType=012o0000000b5Dg
&ent=Opportunity
&opp3={!Contact.Name}-%20Dues%20{!Year(Today())}
&opp11=Posted
&opp9={!TODAY()}
&00No0000004Hou3= {!TODAY()}
&00No0000004Hou1=01%2F01%2F{!TEXT(YEAR(TODAY()+1))}
```

#### Link Description:

##### 1. The base URL. Do not change this.

```
/006/e?lookupcmpgn=0&retURL=%2F{!Contact.Id}&accid={!Account.Id}&conid={!Cont
act.Id}
```

##### 2. Your organization's Membership record type. Change this.



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`&RecordType=012o000000b5Dg`

This is the UNIQUE ID of the Record Type for your organization. Find this by going to Setup->Build->Customize->Opportunities->Record Types, clicking on the record type “Membership” and looking for &id in the URL.

Your URL for your record type will look like this:

```
https://cs9.salesforce.com/setup/ui/recordtypefields.jsp?id=012o000000b5Dg&type=Opportunity&setupid=OpportunityRecords
```

The highlighted information is what you need to copy and paste into the button URL.

The screenshot shows the Salesforce interface for configuring a record type. The browser address bar shows the URL: `https://cs15.salesforce.com/setup/ui/recordtypefields.jsp?id=012i000000N6ix&type=Opportunity&setupid=OpportunityRecords`. The record type ID `012i000000N6ix` is circled in red. The page title is "Record Type Membership". Below the title, there is an "Edit" button and a table of record type details:

Record Type Label	Membership	Active	✓
Sales Process	Donation Sales Process		
Record Type Name	Membership		
Namespace Prefix			
Description			
Created By	501P Admin, 6/30/2013 9:13 PM	Modified By	501P Admin, 6/30/2013 9:13 PM

### 3. The name of the new Membership donation. Changing this is optional.

`&ent=Opportunity&opp3={!Contact.Name}-%20Dues%20{!Year(Today())}`

This automatically names your donation in the pattern “Jane Smith- Dues – 2015”

You can replace these components to name your memberships. %20 represents a space character in the URL, and anything between {! and } must be a valid Account field or formula.

### 4. The Stage. Changing this is optional.

`&opp11=Posted`

This automatically fills the stage in as posted. You can replace the stage with an existing stage in Salesforce or not have it auto-populate it all.

### 5. The Close Date. Changing this is optional

`&opp9={!TODAY()}}`

This is automatically populating the close date as today’s date. You can populate this field with any date or you not have it auto-populate at all.

**6. Update the ID of your Membership Start Date field. Change this.**

`&00No0000004Hou3= {!TODAY()}}`

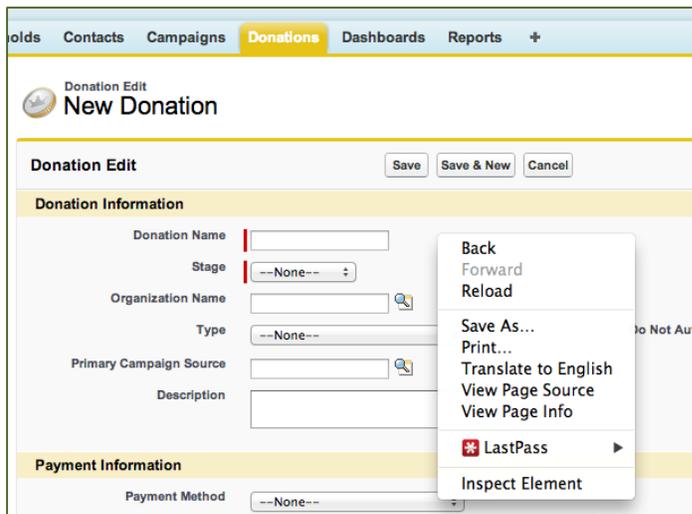
This part of the link is saying to populate the Membership Start Date as today.

The 00No0000004Hou3= is DIFFERENT FOR EVERYBODY. It is the unique field id in the new donation form page that corresponds to Membership Start Date.

***To find this unique ID for your organization:***

- Go to the Donations tab, click “New” and select your “Membership” Record Type. Click “Continue.”
- Right-click (or control click) on the new donation page, and select “View Page Source” (note: this is going to vary based on your browser. Google for “view source” and your browser name to find out exactly how to view the source code of a web page.
- Use find (ctrl+f or apple+f) to search for “Membership Start Date”.
- Look for HTML that resembles the following, and copy the highlighted ID (from your organization, it will differ from what is shown here). Replace the ID in the button URL with the ID from your organization.

`<label`



`for="00No0000004Hou3">Membership Start Date</label>`





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**Scenario 2-** These instructions assume that you want a second membership to pick up on the first membership's end date. It is set up for renewing a membership if a prior one exists.

**Copy and paste the following into the text box.** Areas that you will have to change are highlighted and link to detailed descriptions of how to interpret and change the information to get it to work in your environment.

```
/006/e?lookupcmpgn=0&retURL=%2F{!Contact.Id}&accid={!Account.Id}&conid={!Contact.Id}RecordType=012A00000000gTRo&ent=Opportunity&opp3={!Account.Name}%20-%20Membership%20{!Today}&00NA00000008gH4D={!IF(ISBLANK(Contact.npo02__MembershipJoinDate__c),Today(),IF(ISBLANK(Contact.npo02__MembershipEndDate__c),Today(),Contact.npo02__MembershipEndDate__c))}&00NA00000008gH4E={!IF(ISBLANK(Contact.npo02__MembershipEndDate__c),Today()+365,Contact.npo02__MembershipEndDate__c+365)}&00NA00000008gH4C={!IF(!ISBLANK(Contact.npo02__LastMembershipOrigin__c),"Renewal","New")}&00NA00000008gH4A={!IF(ISBLANK(Contact.npo02__LastMembershipLevel__c),"",Contact.npo02__LastMembershipLevel__c)}
```

**Link Breakdown:** replace all unique fields with merge fields or field ID's

```
/006/e?lookupcmpgn=0  
&retURL=%2F{!Contact.Id}  
&accid={!Account.Id}&  
conid={!Contact.Id}  
RecordType=012A00000000gTRo  
&ent=Opportunity  
&opp3={!Account.Name}%20-%20Membership%20{!Today}  
&00NA00000008gH4D={!IF(ISBLANK(Contact.npo02__MembershipJoinDate__c),Today(),IF(ISBLANK(Contact.npo02__MembershipEndDate__c),Today(),Contact.npo02__MembershipEndDate__c))}  
&00NA00000008gH4E={!IF(ISBLANK(Contact.npo02__MembershipEndDate__c),Today()+365,Contact.npo02__MembershipEndDate__c+365)}  
&00NA00000008gH4C=  
{!IF(!ISBLANK(Contact.npo02__LastMembershipOrigin__c),"Renewal","New")}  
&00NA00000008gH4A={!IF(ISBLANK(Contact.npo02__LastMembershipLevel__c),"",Contact.npo02__LastMembershipLevel__c)}
```

**Link Description:**

**1. The base URL. Do not change this.**



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```
/006/e?lookupcmpgn=0&retURL=%2F{!Contact.Id}&accid={!Account.Id}&conid={!Contact.Id}
```

This is consistent for everyone.

### 2. Your organization's Membership record type. Change this.

```
&RecordType=012A0000000qTRo
```

This is the UNIQUE ID of the Record Type for your organization. Find this by going to Setup->Build->Customize->Opportunities->Record Types, clicking on the record type "Membership" and looking for &id in the URL.

Your URL for your record type will look like this:

```
https://cs9.salesforce.com/setup/ui/recordtypefields.jsp?id=012A0000000qTRo&type=Opportunity&setupid=OpportunityRecords
```

The highlighted information is what you need to copy and paste into the button URL.

The screenshot shows the Salesforce interface for configuring a Record Type. The browser address bar shows the URL: `https://cs15.salesforce.com/setup/ui/recordtypefields.jsp?id=012i0000000NGix&type=Opportunity&setupid=OpportunityRecords`. The record type ID `012i0000000NGix` is circled in red. The page title is "Record Type Membership". Below the title, there is an "Edit" button and a description: "Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for record type." The configuration table shows the following details:

Record Type Label	Membership	Active	✓
Sales Process	Donation Sales Process		
Record Type Name	Membership		
Namespace Prefix			
Description			
Created By	501P Admin, 6/30/2013 9:13 PM	Modified By	501P Admin, 6/30/2013 9:13 PM

### 3. The name of the new Membership donation. Changing this is optional.

```
&ent=Opportunity&opp3={!Account.Name}%20-%20Membership%20{!Today}
```

This is consistent for everyone. It will automatically name your donation in the pattern "Jane Smith – Membership – 3/14/2013"

You can replace these components to name your memberships. %20 represents a space character in the URL, and anything between {! and } must be a valid Account field or formula.

**4. Update the ID of your Membership Start Date field. Change this.**

```
&00NA0000008gH4D={!IF(ISBLANK(Contact.npo02_MembershipJoinDate__c),Today(),IF(ISBLANK(Contact.npo02_MembershipEndDate__c),Today(),Contact.npo02_MembershipEndDate__c))}
```

The {!IF(ISBLANK... Part of the URL is saying:

On the *contact record*, look for Membership Join Date. If it's empty, we want to use today's date as the membership start date in the *membership donation*. If it's not empty, we want to see if, on the *contact record*, there's a Membership End Date. If there isn't one, use today's date as the start date in the *membership donation*. If there is one, use *last year's end date (stored on the contact record) as this year's start date*. This will not disrupt your membership join date.

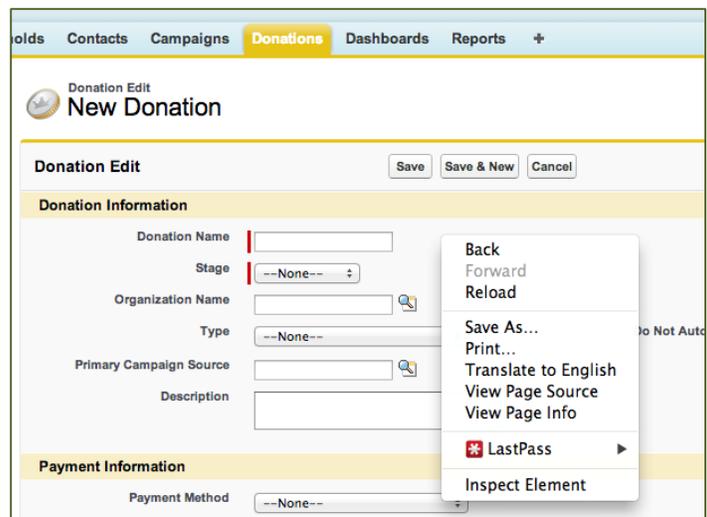
The 00NA0000008gH4D is DIFFERENT FOR EVERYBODY. It is the unique field id in the new donation form page that corresponds to Membership Start Date.

**To find this unique ID for your organization:**

- e. Go to the Donations tab, click "New" and select your "Membership" Record Type. Click "Continue."
- f. Right-click (or control click) on the new donation page, and select "View Page Source" (note: this is going to vary based on your browser. Google for "view source" and your browser name to find out exactly how to view the source code of a web page).
- g. Use find (ctrl+f or apple+f) to search for "Membership Start Date".
- h. Look for HTML that resembles the following, and copy the highlighted ID (from your organization, it

will differ from here). Replace URL with the ID organization.

```
<label
```



what is shown the ID in the button from your

```
for="00NA0000008gH4D">Membership Start Date</label>
```





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```
={!IF(ISBLANK(Contact.npo02_MembershipEndDate__c),Today()+365,IF(Contact.npo02_MembershipEndDate__c < Today()),Today()+365,Contact.npo02_MembershipEndDate__c+365))}
```

### 6. Update the ID of your Membership Origin field. Change this.

```
&00NA0000008gH4C={!IF(!ISBLANK(Contact.npo02_LastMembershipOrigin__c),"Renewal","New")}
```

The 00NA0000008gH4C is DIFFERENT FOR EVERYBODY. It is the unique field id in the new donation form page that corresponds to Membership Origin. To find this unique ID for your organization, view source and use find to search for “Membership Origin”. Look for HTML that resembles the following, and copy the highlighted ID (from your organization, it will differ from what is shown here). Replace the ID in the button URL with the ID from your organization.

```
<label for="00NA0000008gH4C">Membership Origin</label>
```

The {!IF(ISBLANK.... Part of the URL is saying:

On the *contact record*, look for Membership Origin. If it’s empty, this is a *new membership* on the *membership donation*; if it’s not empty, this is a *renewal*. **Note, if this is actually anything other than a renewal, you will have to manually override the renewal selection on the *membership donation*.**

### 7. Update the ID of your Membership Level field. Change this.

```
&00NA0000008gH4A={!IF(ISBLANK(Contact.npo02_LastMembershipLevel__c),"",Contact.npo02_LastMembershipLevel__c)}
```

The 00NA0000008gH4A is DIFFERENT FOR EVERYBODY. It is the unique field id in the new donation form page that corresponds to Membership Level. To find this unique ID for your organization, right-click (or control click) on the new donation page, use find to search for “Membership Level”. Look for HTML that resembles the following, and copy the highlighted ID (from your organization, it will differ from what is shown here). Replace the ID in the button URL with the ID from your organization.

```
<label for="00NA0000008gH4A">Membership Level</label>
```

The {!IF(ISBLANK.... Part of the URL is saying:

On the *contact record*, look for Membership Level. If it’s not empty, copy the last membership level into the new *membership donation*. If it is empty, leave it empty. **Note, if a member changes levels, you will have to manually override the membership level on the *membership donation*.**

### 8. Save your button and test!



## **NPSP Technical Brief**

This is a bit of work to get exactly right, but it's well worth it in the time you'll save processing memberships. Make sure you test several use cases to make sure that your membership managers are able to consistently see the behavior they expect.