

Organization Record Basics

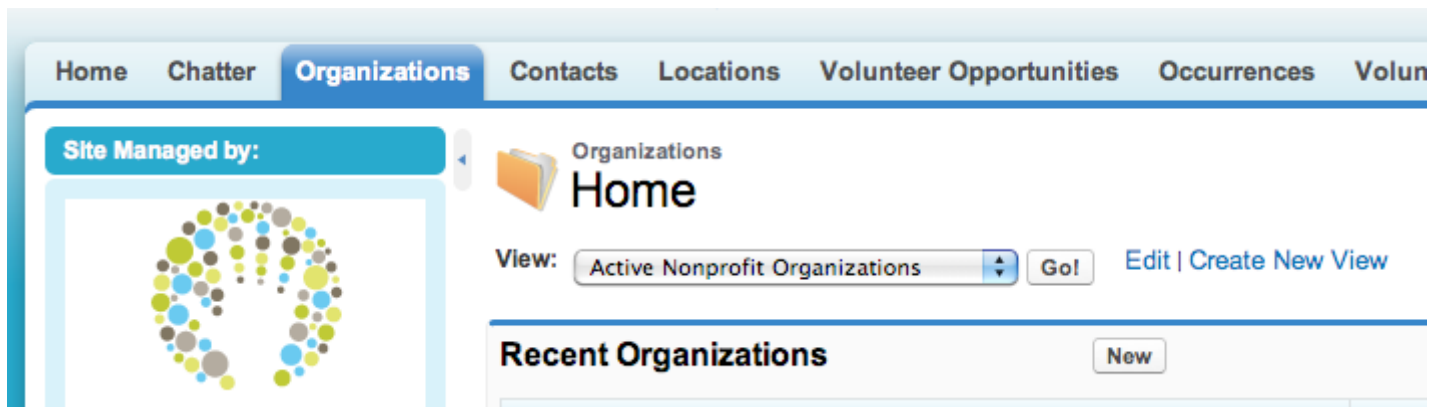
In Salesforce, there are two main record types that are the backbone of its database:

Accounts and Contacts.

Every contact in the system **MUST** be associated with an account or you are unable to save the record! Contacts are typically associated with the organization that they work for! But we don't always have the organization that someone works for in our database when working with volunteers.

So there are a number of other types of 'accounts' (or as we call them in HandsOn Connect) "organizations"

So what's an organization?



"Accounts" is terminology better suited to the work of a Sales organization. So in HandsOn Connect, the Salesforce objects that are natively known as 'accounts' have been renamed Organizations.

What kinds of organizations do we keep track of in HandsOn Connect?

New Organization Select Organization Record Type

Select a record type for the new organization. To skip this page in the future, change your record type settings on your personal setup page.

Select Organization Record Type

Record Type of new record

Business

✓ Nonprofit

When we create new organization records in HandsOn Connect - we typically assign them to one of two record types:

Nonprofit Record Type - This record type is used for organizations that you will partner with to post volunteer opportunities on your site. They may be nonprofits but they also might be Civic Organizations, a School, a Government Organization, a faith-based institution or even a foundation. Use this record type for any Active or Prospective Partner Organizations on whose behalf you will recruit volunteers.

Business Record Type - This record type is used for any other entity you do business with. This would include corporations, media, vendors, sponsors, etc. They are typically for-profit organizations who you would not be sending volunteers to. (Though these organizations may be a SOURCE of volunteers).

These two record types have slightly different page layouts based on the information you'd need to track for one type versus another.

Are there other organizational record types?

Yes. Because every new contact MUST be associated with an organization record - and in the nonprofit world not every contact would be associated with a business or nonprofit that you are tracking in your database, volunteer contacts are typically associated with a special Account Record Type of one kind or another.


1) **Household Account:** this is a special type of account record type, that typically is used if you are tracking donor information. Users of the NonProfit Success Pack (NPSP) are encouraged to set their SF instance in the Household Account model. In this model, Salesforce automatically creates an account record for a new contact with the name "(LAST NAME) Household". This allows you to associate multiple members of the same household as belonging to the same account - and donations for the household can be tracked. Because of the popularity of the NPSP, in 2017 most new users of HandsOn Connect have been placed in the Household Account model - so that households are automatically created for each of their volunteers.


2). **Administrative Account:** this is a special type of account record type, typically used if you are using Salesforce's HEDA (Higher Education) data model. All contacts are associated with an account with the name "(LAST NAME) Administrative Account"

3) **Individual Account:** There is also an organizational record type called **Individual**. It is a generic account that was the original default account model for HandsOn Connect. Customers using HOC prior to 2017 generally are in the Individual Account model.

Why would 'individual' be an organization?

There is only one organization record of this type, and that organization is called **Individual**. In the individual account model It's used as the default account for each contact.

▼ Contact Information		Registration Status	Registered
Contact Owner	 Larry Deckel [Change]	Employer	Riverside Proper
Name	Valerie Volunteer	Organization Name	Individual
Middle Name		Title	Director of Human Services



Since its necessary for every contact to be associated with an organization, and in the case of our volunteers we might not know who their employer is, HandsOn Connect, in the Individual Account model, by default, initially assigns each volunteer who registers on the public site to the 'phantom' organization, **Individual**. That way the record can be created.

If you later find out who the volunteer's employer is -- you can update their contact record to reflect their real organizational relationship. (To do this though, you'd have to create an organizational record for their employer.)

(In this example - on her registration form Valerie Volunteer said her employer was "Riverside Proper" but the system assigns her to the Organization "Individual".

If and when we add Riverside Proper to our database as an organization (if we wish to track them), we could edit the record and then use the Lookup field to find the "Riverside Proper" record and associate Valerie as an employee of theirs. This is entirely optional. (As long as she has the organization Name "Individual" her record can exist in the system.

Account Models

If you're using the Household Model or the Admin Account Model - these organizations are created for you automatically. If you're in the "Individual Account" Model -- the one record "Individual" is already part of HandsOn Connect.

[See this next article on how organization records are typically added to your data via the public site:](#)