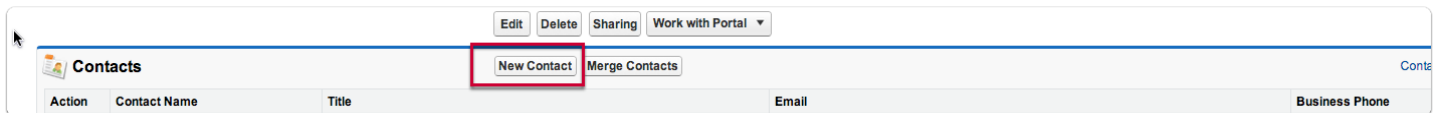


Adding a new contact from the organizational record

To create a new contact from the organizational record - click on the 'new' button in the contact related list in an organization's record



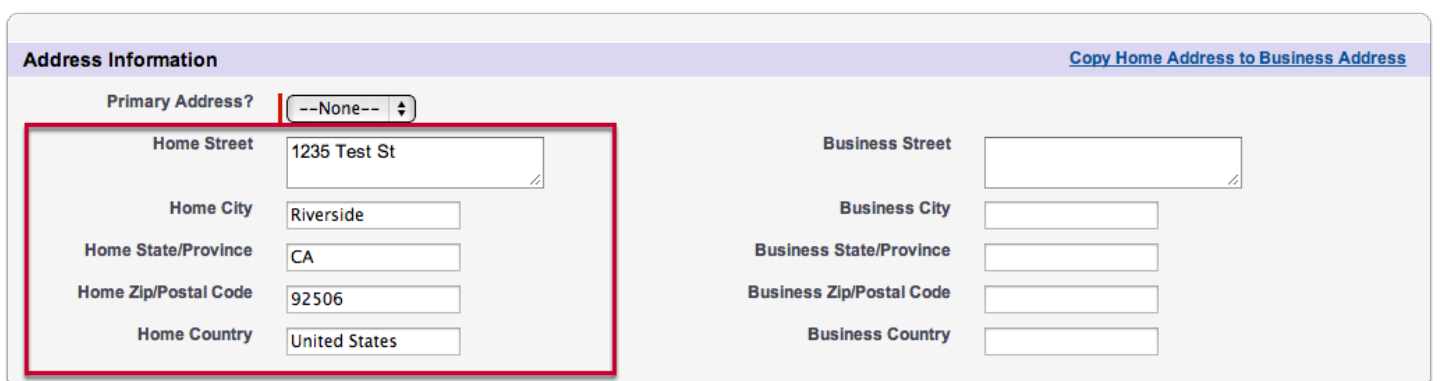
The screenshot shows the top of a Salesforce page with a 'Contacts' related list. Above the list are buttons for 'Edit', 'Delete', 'Sharing', and 'Work with Portal'. Below these are buttons for 'New Contact' and 'Merge Contacts'. The 'New Contact' button is highlighted with a red box. The table below has columns for 'Action', 'Contact Name', 'Title', 'Email', and 'Business Phone'.

When you do this, the organization name is already pre-populated for you for the contact.



The screenshot shows the 'Contact Owner' section with 'Larry Deckel' as the owner. Fields for 'First Name', 'Last Name', 'Middle Name', and 'Username' are present. The 'Registration Status' is set to '--None--'. The 'Employer' section is highlighted with a red box, showing 'Organization Name' pre-populated with 'Troutco' and a search icon.

The address is brought over from the organization record too -- but not in the way you might expect. Here's why.



The screenshot shows the 'Address Information' section. A link 'Copy Home Address to Business Address' is visible. The 'Primary Address?' dropdown is set to '--None--'. The 'Home Address' fields are highlighted with a red box: 'Home Street' (1235 Test St), 'Home City' (Riverside), 'Home State/Province' (CA), 'Home Zip/Postal Code' (92506), and 'Home Country' (United States). The 'Business Address' fields are empty.

You'll be surprised to see that the address from the organization record is placed in the "Home Address" of the contact record, rather than the Business Address. That doesn't make sense, but here's why it happens:

In Salesforce (without HandsOn Connect), there aren't "Home" and "Business" addresses for contacts. Native Salesforce's two address fields are normally named "Mailing Address" and

"Other Address". In HandsOn Connect however, we've renamed these addresses to "Home Address" and "Business Address" as this is more useful in our nonprofit / volunteer way of thinking about contacts.

Salesforce however, when creating a contact from an organization record, automatically moves the organizational address into the first set of address fields in a contact record. (What it natively calls "mailing address" but we have renamed "Home Address".) There is no way for HandsOn Connect to override this native Salesforce Behavior and automatically populate this into the fields we've relabeled "Business Address". But its easy to correct this little anomaly when you create a contact record this way.

Copy the Home Address to the Business Address fields by using the link in this section "Copy home address to business Address"

The screenshot shows the 'Address Information' section in Salesforce. It contains two columns of address fields: 'Home' and 'Business'. The 'Primary Address?' dropdown is set to 'Business'. A red box highlights the 'Primary Address?' dropdown and the 'Home Street' field. A blue link 'Copy Home Address to Business Address' is highlighted in the top right corner.

Home Address		Business Address	
Primary Address?	Business		
Home Street	1235 Test St	Business Street	1235 Test St
Home City	Riverside	Business City	Riverside
Home State/Province	CA	Business State/Province	CA
Home Zip/Postal Code	92506	Business Zip/Postal Code	92506
Home Country	United States	Business Country	United States

Clicking on this link takes the contents of the 'home address' fields, and copies them to the business Address fields for you with one click. Don't forget to set the required "Primary Address?" field to "Business".

If you know the correct home address of the contact you can update the home addresses.

If you don't know the home address you can either delete the content of those fields, or you can leave them as is. There's no harm in having the same address as home and business if you don't know a separate home address for the contact.

(Later on, if you grant the contact a login of some kind -- they will probably update those home address fields for you on their own :-)

Salesforce Lightning ScreenShots

Organization
HandsOn Connect 9015

Status: Active Partner | Organization Type: HOC Customer | Phone: 951-780-3609 | Website:

Related List Quick Links

- Related Contacts (2)**
- Volunteer Opportunities (Organization Server) (3)
- Locations (1)
- Registration Answers (0)

Related Contacts
2 items • Updated a few seconds ago

[New Contact](#) [Add Relationship](#)

CONTACT NAME	ORGANIZATION NAME	DIRECT	TITLE	HOC ACC...	ROLES	PROFILE NAME
Rafael Brito	HandsOn Connect 9015	<input checked="" type="checkbox"/>				Partner Staff
Larry Secondo	HandsOn Connect 9015	<input checked="" type="checkbox"/>				Partner Staff

! SF Lightning does not currently have the functionality to copy the 'home' address over to the Business Address fields -- so you'll have to manually input the business address if you want that field populated.