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NPSP: Adding Payments to Existing Opportunities

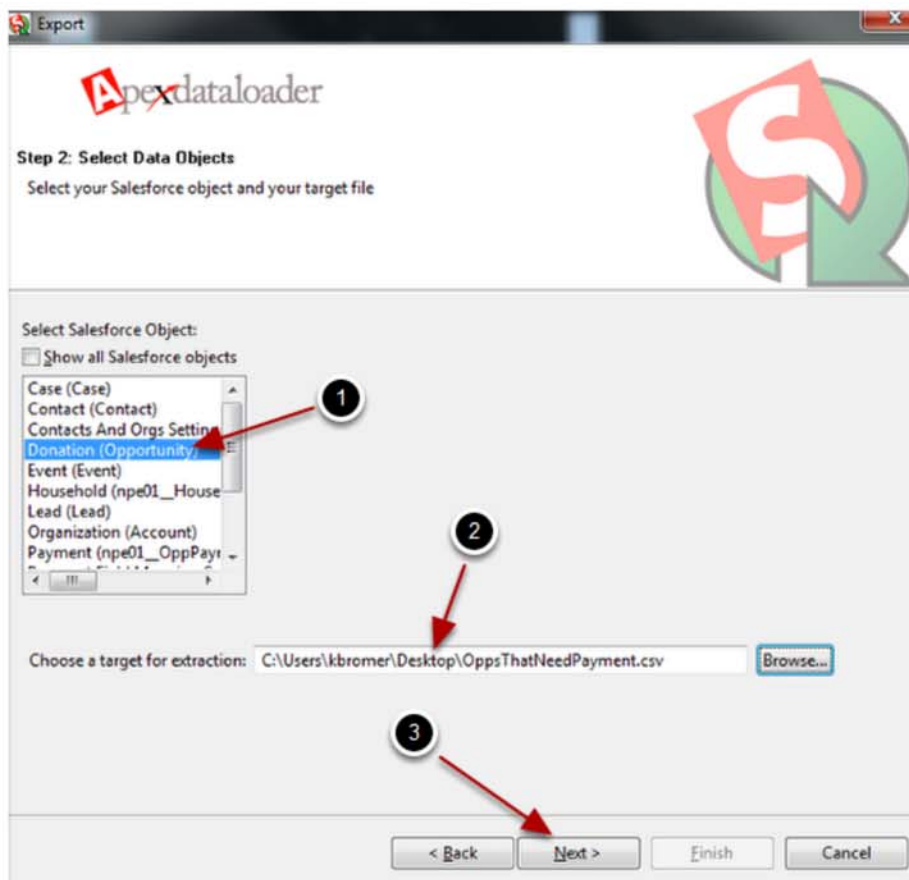
Using the Apex Dataloader, its easy to add payment records to already existing donations. This article will show you how.

Select Export and Login



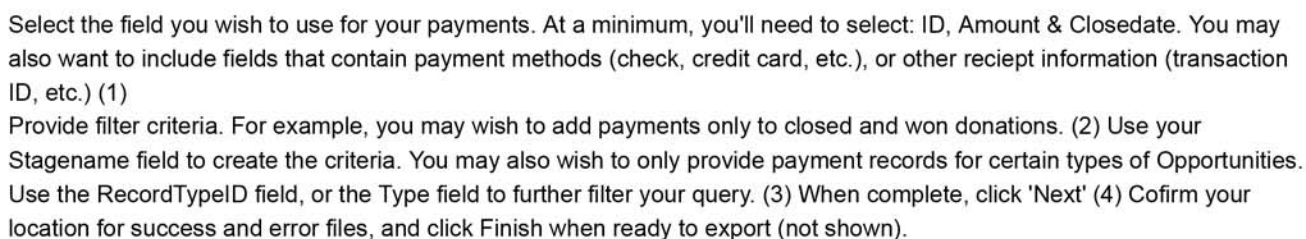
Launch the Apex Dataloader, and select 'Export' from the list of options. Provide your Salesforce.com username/password when prompted.

Select Your Export Object & Target



Select Opportunity (or Donation if renamed) as your Salesforce Object for export (1), and provide a location for the exported file (2). Click 'Next' to continue.(3)

Select Fields and Filters



The screenshot shows the Microsoft Excel ribbon with the 'Insert' tab selected. Four red arrows point to specific icons: 1. The 'Table' icon (a grid), 2. The 'PivotTable' icon (a cube), 3. The 'PivotChart' icon (a bar chart), and 4. The 'Formulas' icon (a calculator) followed by the 'Insert Function' icon (a function symbol). Below the ribbon, a table is visible with columns A, B, C, D, and E. Column A contains IDs, B contains amounts, C contains dates, and D contains payment status. Row 1 is the header row, and rows 2-6 contain data.

	A	B	C	D	E
1	npe01_Opportunity_c	npe01_Payment_Amount_c	npe01_Payment_Date_c	npe01_Paid_c	
2	0068000000b3f8AAI	500	9/22/2011		1
3	0068000000b3VJAAI	12000	9/22/2011		1
4	0068000000b3VdAAI	870	9/3/2011		1
5	0068000000b3XIAAI	100000	9/23/2011		1
6	0068000000b4NzAAI	100	9/23/2011		1
7	0068000000b3GdAAI	250	9/22/2011		1
8					
9					
10					
11					
12					

Change the name of the ID column to npe01__Opportunity__c (1)

Change the name of the AMOUNT column to npe01__Payment Amount__c (2)

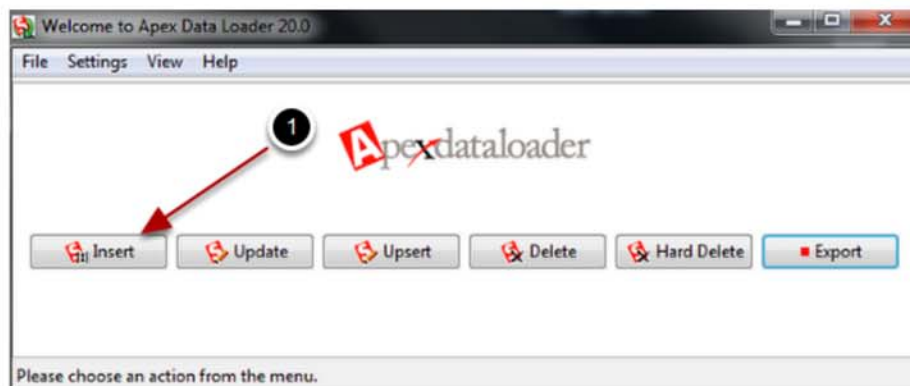
Change the name of the CLOSEDATE column to npe01__Payment_Date__c (3)

Finally, if you're only adding payments to closed and won opportunities, add a column called npe01__Paid__c, and fill the column with a 1 (4)

When finished, save your file. **MAKE SURE THE FILE IS SAVED IN THE SAME .CSV FORMAT IT WAS ORIGINALLY IN.**

(Note: If you selected additional columns in the previous step, you'll be able to map them independently later on.)

Setup Dataloader for Insert



If your Dataloader is still open, select 'Insert' from the list of options. Otherwise, re-launch the Apex Dataloader and select 'Insert'.

Select Insert Object and File

Apexdataloader

Step 2: Select data objects
Select your Salesforce object and your CSV file.

Select Salesforce object:

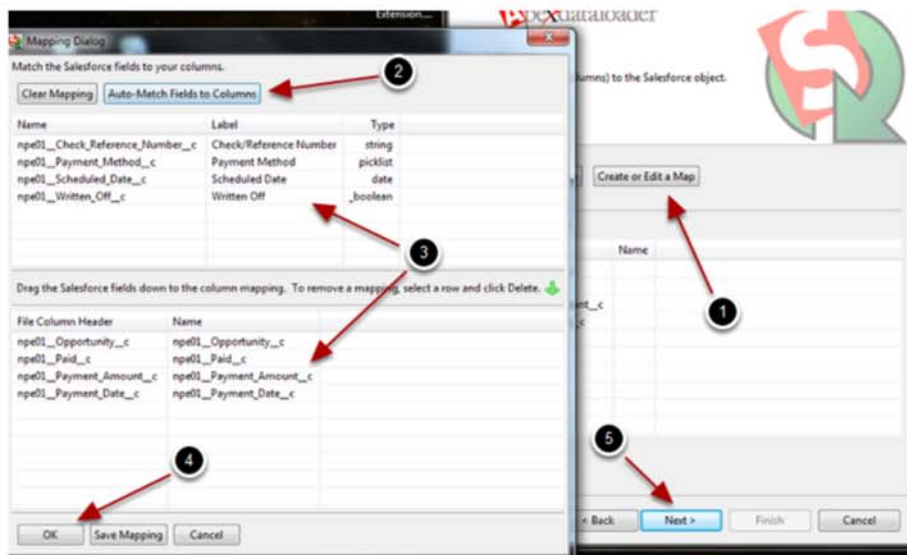
☐ Show all Salesforce objects

- Case (Case)
- Contact (Contact)
- Contacts And Orgs Settings (
- Donation (Opportunity)
- Event (Event)
- Household (npe01__Househo
- Lead (Lead)
- Organization (Account)
- Payment (npe01__OppPayment__c)**
- Payment Field Mapping Setti

Choose CSV file:

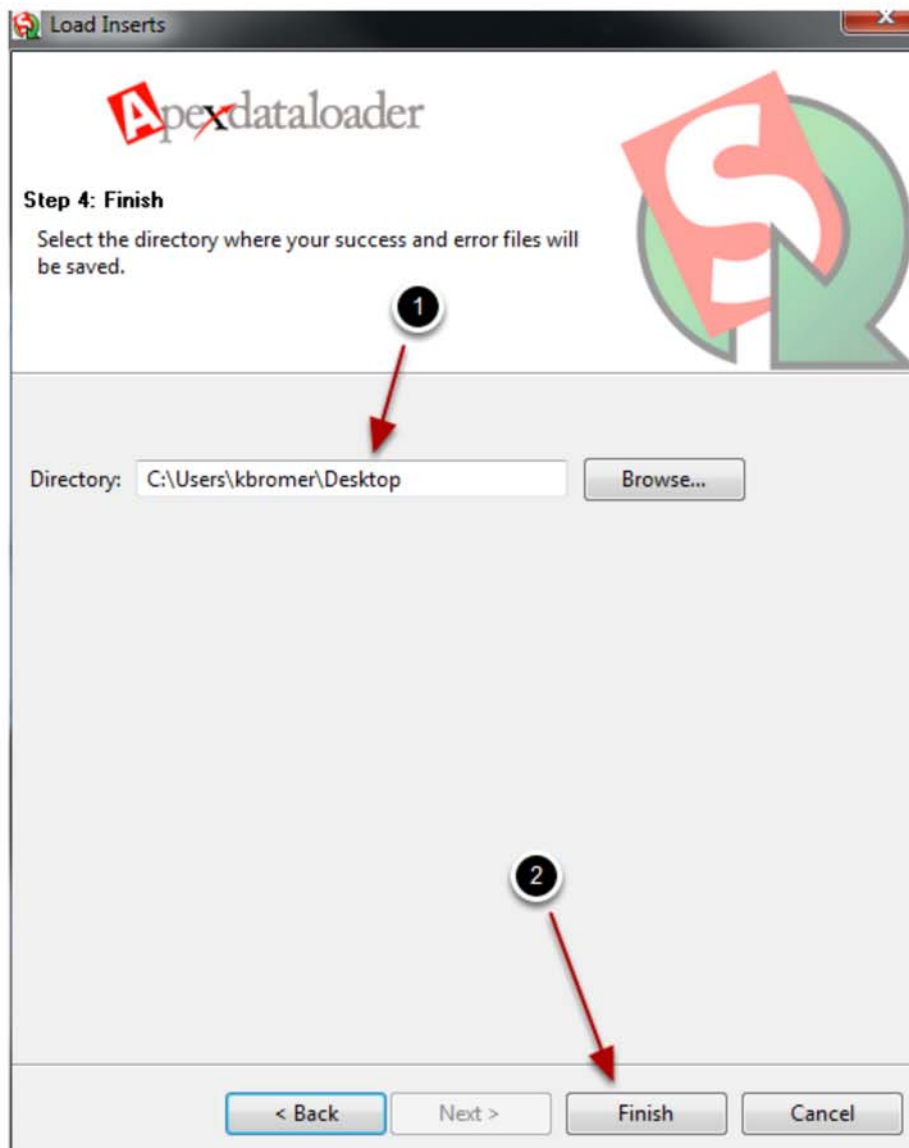
Select your insert object as the Payment (npe01__OppPayment__c) object (1), and the CSV file as the file you were previously working with (2). Click 'Next' to continue. (3)

Mapping



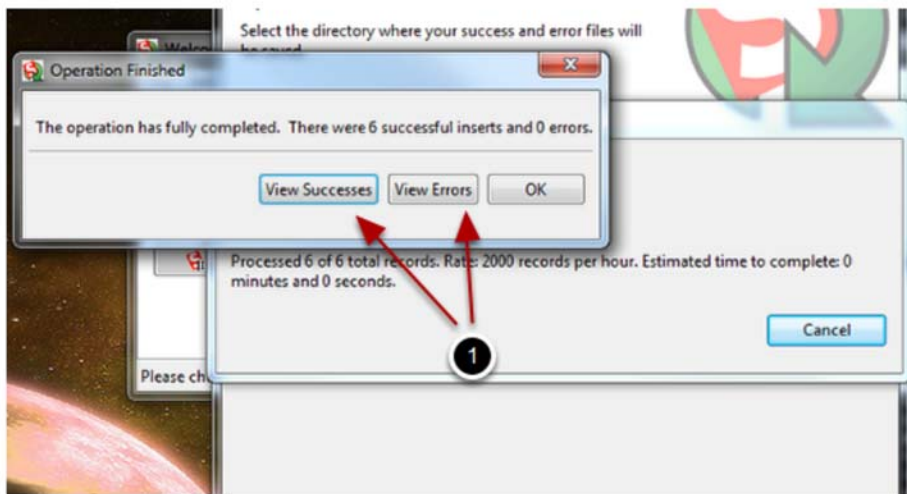
Select 'Create or Edit a Map' to map the fields in your CSV file to the fields you want to be populated in the Payment object (1). Clicking 'Auto-Match' Field to Columns will automatically select the fields for the columns with the appropriate names (2). If you have additional fields in your file, you may need to match them up by hand with the Payment fields listed in the top section (3). When complete, click 'OK'. (4) Then click 'Next' (5)

Select Location for Success/Error Files



Select a location for success and error files from the Dataloader (1), and click 'Finish' to begin the process. (2)

View Successes and/or Errors



The Dataloader will provide you with the results of your operation. Any errors can be found in the error file by clicking on 'View Errors' (1). Additional information about the error will be provided. Common issues include mismatching field mappings and required fields on the Payment object.



(/_ui/core/userprofile/UserProfilePage?u=00580000003egB0AAI) Contributor by Kevin Bialstra, Alice 2.0 User profile
/UserProfilePage?u=00580000003egB0AAI)
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