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NPSP: Working With Payments

Payments allow you to track cash independently from revenue. Version 2.1 of Contacts & Organizations introduced a new Payment object, as well as wizard for helping to creating and modify existing payments.

Enabling Payments



Payments can be enabled by going to the 'Contact Settings' tab (1), (you may need to click on the '+' sign to view additional tabs (2)).

Checking the 'Enable Payments' box will provide access to the payment creation/writeoff wizard, as well as automatically generate Payments for your new Donations (Opportunity). (3)

Click 'Update the Contacts and Organizations Settings' to continue. (4)

NOTE: Enabling Payments will not automatically create payments for existing records. If you want to add Payment records to your existing Donations (Opportunities), please see the 'Adding Payments to Existing Donations' lesson.

Creating a New Donation (Opportunity) (1)

Donation Edit
New Donation

Donation Information

Donation Name: Steve Andersen- Donation
 Organization Name: Steve Andersen
 Amount: 500
 Close Date: 10/2/2011
 Do Not Automatically Create Payment: ☐
 Description:

System Information

Donation Owner: Steve Andersen

Check Number: 0675309
 Primary Campaign Source: Closed Won
 Next Step:
 Type:
 Probability (%): 100

When Payments are enabled, new Donations (Opportunities) automatically receive a new payment record. How the record is created depends on how the Donation is created.

If the Donation (Opportunity) is marked with a Stage that is closed and won (1), a matching payment will be created that is marked 'Paid'. The Amount field will be mapped to the 'Payment Amount' field on the Payment record (2), while the Close Date field will be mapped to the Payment Date field on the Payment record (3). Any additional fields that are mapped using the Payment Mapping Wizard will also be included. (4)

You can override the creation of a new Payment when creating a new Donation by checking the 'Do not Automatically Create Payment' box on the Donation (Opportunity). (5)

Creating a New Donation (Opportunity) (2)

Donation Detail

Donation Name: Steve Andersen- Donation 10/2/2011
 Organization Name: Steve Andersen
 Amount: \$500.00
 Close Date: 10/2/2011
 Do Not Automatically Create Payment: ☐
 Description:

Payment Information

Remaining Balance: \$0.00
 Payment Amount Received: \$500.00
 Number of Payments: 1
 Payment Withdrawn Amount: \$0.00

System Information

Created By: Steve Andersen
 Donation Owner: Steve Andersen
 Last Modified By: Steve Andersen

Contact Roles

Action	Contact Name	Organization Name	Email	Phone	Role	Primary
Edit	Steve Andersen	Steve Andersen	Steve.Andersen@salesforce.com		Other	<input checked="" type="checkbox"/>

Payments

Action	Payment Number	Payment Amount	Payment Date	Status	Written OR	Check Reference Number
Edit	067530972	\$500.00	10/2/2011	Paid	<input checked="" type="checkbox"/>	0675309

Here, we can see the mapping from the Donation fields, to the Payment fields.

(1) Amount -> Payment Amount

- (2) Close Date -> Payment Date
- (3) Stage -> Paid
- (4) Custom Mapping (Check Number -> Check/Reference Number)

New Donation (Opportunity) Fields

The screenshot shows the 'Donation Information' and 'Payment Information' sections of a form. Numbered callouts point to the following fields:

- 1: Description field
- 2: Payment Amount Received field
- 3: Check Number field
- 4: Payment Writeoff Amount field

In addition the Payment object, there are also four new fields available on the Donation (Opportunity) that provide payment-related information

- (1) Remaining Balance show the total amount of all Payments not marked as 'Paid'
- (2) The Payment Amount Received field shows the total amount of all Payments marked as 'Paid'
- (3) Number of Payments shows the total number of payments for this Donation (Opportunity)
- (4) Payment Writeoff Amount shows the total amount of payments that have been written off.

Scheduling Payments

The screenshot shows the 'Donation Detail' section of the form. Numbered callouts point to the following fields:

- 1: 'Do Not Automatically Create Payment' checkbox
- 2: 'Schedule Payments' button in the 'Payments' section

You can use the Payment Wizard to schedule multiple payments, or writeoff existing payments.

The example above shows a Donation (Opportunity) created without Payments by using the 'Do Not Automatically Create Payment' box (1). We'll now add payments using the wizard. Click on 'Schedule Payments' to launch the wizard. (2)

Payment Scheduling Wizard

Payments

Create one or more Payments for this Opportunity

Current Opportunity Info

Donation: **Steve Anderson: Donation 10/2/2011** Amount: \$1,200.00
 Stage: **Prospecting** Payment Amount Received: \$0.00
 Close Date: 10/2/2011 Remaining Balance: \$1,200.00

Create a Payment Schedule

of Payments: **12** (1)
 Date of First Payment: **10/2/2011** (2)
 Interval: **1** Month (3)
 Payment Method: **Credit Card** (4)

Calculate Payments (5)

Payments to be Created (6)

Payment #	Amount	Scheduled Date	Paid Date	Paid?
1	100.00	10/2/2011 (10/2/2011)	10/2/2011 (10/2/2011)	<input checked="" type="checkbox"/>
2	100.00	11/2/2011 (11/2/2011)		<input type="checkbox"/>
3	100.00	12/2/2011 (12/2/2011)		<input type="checkbox"/>
4	100.00	1/2/2012 (1/2/2012)		<input type="checkbox"/>
5	100.00	2/2/2012 (2/2/2012)		<input type="checkbox"/>
6	100.00	3/2/2012 (3/2/2012)		<input type="checkbox"/>
7	100.00	4/2/2012 (4/2/2012)		<input type="checkbox"/>
8	100.00	5/2/2012 (5/2/2012)		<input type="checkbox"/>
9	100.00	6/2/2012 (6/2/2012)		<input type="checkbox"/>
10	100.00	7/2/2012 (7/2/2012)		<input type="checkbox"/>
11	100.00	8/2/2012 (8/2/2012)		<input type="checkbox"/>
12	100.00	9/2/2012 (9/2/2012)		<input type="checkbox"/>

Create Payments (8)

We can select several values for scheduling payments:

- (1) The total number of payments to be created
- (2) The scheduled date for the first payment
- (3) The interval of the schedule payments
- (4) The payment method to be recorded on the payment record.

Clicking 'Calculate Payments' (5) will generate a table of payments to be created (6).

You can then alter any amounts, or scheduled dates, as well as mark any paid payments as paid and provide the Paid Date. (7)

When your payments are configured, click 'Create Payments' to create the payment records for the this Donation (Opportunity). (8)

Writeoff Payments

Donation: Steve Andersen- Donation 10/2/2011

Customize Page | Edit Layout | Printable View | Map for this Page

Back to List | Contacts

Contact Roles | Payments | Open Activities | Activity History | Notes & Attachments | Email History

Donation Detail

Edit | Delete | Close | Matching Donation

Donation Information

Donation Name	Steve Andersen- Donation 10/2/2011	Check Number	
Organization Name	Steve Andersen	Primary Campaign Source	
Amount	\$1,200.00	Stage	Prospecting
Close Date	10/2/2011	Next Step	
Do Not Automatically Create Payment	<input checked="" type="checkbox"/>	Type	
Description		Probability (%)	10%

Payment Information

Remaining Balance	\$1,100.00	Number of Payments	12
Payment Amount Received	\$100.00	Payment Writeoff Amount	\$0.00

System Information

Created By: Steve Andersen 10/2/2011 9:01 AM | Last Modified By: Steve Andersen 10/2/2011 9:09 AM

Donation Owner: Steve Andersen (Contact)

Edit | Delete | Close | Matching Donation

Contact Roles

New

Action	Contact Name	Organization Name	Email	Phone	Role	Primary
Edit Del	Steve Andersen	Steve Andersen	steve.andersen@powerofus.com		Other	<input checked="" type="checkbox"/>

Payments

New Payment | Schedule Payments | Writeoff Payments | Payments Help

Action	Payment Number	Payment Amount	Payment Date	Paid	Written Off	Check/Reference Number
Edit Del	PMT-000073	\$100.00	10/2/2011	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Edit Del	PMT-000074	\$100.00		<input type="checkbox"/>	<input type="checkbox"/>	
Edit Del	PMT-000075	\$100.00		<input type="checkbox"/>	<input type="checkbox"/>	
Edit Del	PMT-000076	\$100.00		<input type="checkbox"/>	<input type="checkbox"/>	
Edit Del	PMT-000077	\$100.00		<input type="checkbox"/>	<input type="checkbox"/>	
Edit Del	PMT-000078	\$100.00		<input type="checkbox"/>	<input type="checkbox"/>	

Show 8 records | Go to first/last

We can also use the Payment Wizard to writeoff payments we no longer expect to be paid. Above, we've collected \$100 of the \$1200 pledge (1), but need to writeoff the remaning amount. Clicking on 'Writeoff Payments' will launch the Payment Writeoff Wizard. (2)

Payment Writeoff Wizard

Home | Donations | Campaigns | Reports | Dashboards | Leads | Contact Merge | Payment Mapping | Contacts Settings | About Nonprofit St...

Payments

Writeoff Remaining Balance

Current Opportunity Info

Donation Name	Steve Andersen- Donation 10/2/2011	Amount	\$1,200.00
Stage	Prospecting	Payment Amount Received	\$100.00
Close Date	10/2/2011	Remaining Balance	\$1,100.00

Writeoff Payments

You are preparing to writeoff 11 Payment(s) totaling \$1,100.00.

Which date would you like to use? 10/2/2011

Writeoff Payments

The Payment Writeoff Wizard tell you the number and total amount for the payments being written-off (1). You can also provide a date for the writeoff action (2). Click on 'Writeoff Payments' to mark the remaining payments as written-off. (3)

Payment Results

Donation Detail Edit Delete Clone Matching Donation

Donation Information

Donation Name	Steve Andersen: Donation 10/2/2011	Check Number	
Organization Name	Steve Andersen	Primary Campaign Source	
Amount	\$1,200.00	Stage	Closed Won
Close Date	10/2/2011	Next Step	
Do Not Automatically Create Payment	<input checked="" type="checkbox"/>	Type	
		Probability (%)	100%

Description

Payment Information

Remaining Balance	\$0.00	Number of Payments	2
Payment Amount Received	\$100.00	Payment Writeoff Amount	\$1,100.00

System Information

Created By	Steve Andersen: 10/2/2011 9:51 AM	Last Modified By	Steve Andersen: 10/2/2011 9:15 AM
Donation Owner	Steve Andersen (Charged)		

Contact Roles New Contact Roles Help

Action	Contact Name	Organization Name	Email	Phone	Role	Primary
Edit Del	Steve Andersen	Steve Andersen	steve.andersen@salesforce.com		Other	<input checked="" type="checkbox"/>

Payments New Payment Schedule Payments Writeoff Payments Payments Help

Action	Payment Number	Payment Amount	Payment Date	Paid	Written Off	Check/Reference Number
Edit Del	PM1-00073	\$100.00	10/2/2011	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Edit Del	PM1-00069	\$1,100.00	10/2/2011	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

The remaining payments have been combined into a single payment record, and marked as 'Written Off' (1), though our previously paid payment still remains (2)

Our payment fields on the Donation (Opportunity) have been updated to reflect the change in the payment records below (3)



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