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NPSP: Add a Single-Payment Donation

This article includes these topics:

- Individual Donations versus Organizational Donations
- Add a Single-Payment Donation for an Individual
- Add a Single-Payment Donation for an Organization

TIP: See the *NPSP Donation Management Overview* (</articles/Resource/NPSP-Donation-Management-Overview>) if you're just starting out and need more info about how opportunities and donations work in Salesforce.

Individual Donations versus Organizational Donations

The Nonprofit Success Pack lets you enter donations from individuals, as well as donations from companies or organizations. You enter donations from individuals on the **Contact** record, and donations from organizations on the **Account** record.

A bit about Household donations . . .

The Nonprofit Success Pack also lets you enter donations from a Household (i.e. from the Household Account record), in the same way that you would enter a donation from a larger organization. However, when you do so, the Primary Contact for the household receives the hard credit for the donation, with the rest of the members in the household receiving soft credits. This is not a bad thing, but it can make for an inconsistent workflow, so we recommend that you **always enter household-wide donations as individual donations from the household's Primary Contact**. When you do that, the entire household will receive the credit, and your workflow will be easier for you to track.

Add a Single-Payment Donation for an Individual

1. Search for the Contact associated with the donation.
2. On the Contact record, in the Opportunities related list, click **New Contact Donation**.



3. Select the **Donation** record type and click **Continue**.
The opportunity name appears in the Opportunity Name field.
4. Fill in the required fields. By default these are:
 - Opportunity Name
 - Account Name
 - Close Date
 - Stage

NOTE: The Nonprofit Success Pack automatically fills in the Opportunity Name and Account Name fields for you. You don't generally need to adjust these values.

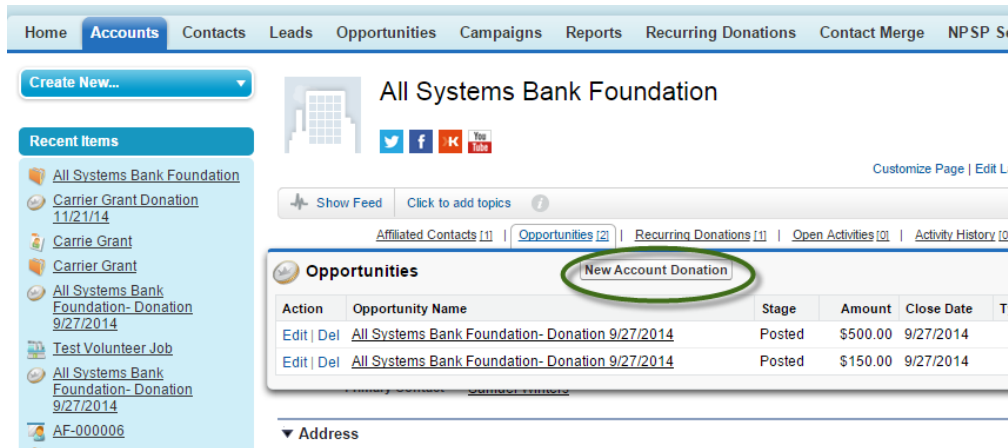
Remember, this is Salesforce after all, so the language may seem a bit odd. In the sales world, opportunities are "posted" and "closed," so we're also using that lingo for our donation. If you "have check in hand," enter **Posted** as the Stage of the opportunity. The "Posted" stage has internal meaning to Salesforce overall, and will trigger rollups amongst other things.

Additionally, your administrator may have created other required fields for your organization, so you may need to fill those in too.

5. Click **Save**.
Salesforce creates a payment record for the new donation, and that payment appears in the Payments related list of the Opportunity record you just created.

Add a Single-Payment Donation for an Organization

1. Search for or create the Organizational Account record associated with the donation.
2. On the Account record, in the Opportunities related list, click **New Account Donation**.



3. Select the **Donation** record type and click **Continue**.
The opportunity name appears in the Opportunity Name field.
4. Fill in the required fields. By default these are:
 - Opportunity Name
 - Account Name
 - Close Date
 - Stage

NOTE: The Nonprofit Success Pack automatically fills in the Opportunity Name and Account Name fields for you. You don't generally need to adjust these values.

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