

# NPSP: Donation Management Overview

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## A Bit About Salesforce and “Donations”

Salesforce was originally designed as a "Business-to-Business" (B2B) application to help companies improve their sales processes, and by extension maximize their sales. In the traditional B2B scenario, every company keeps track of their accounts (i.e. the other companies or businesses they are selling to). Each account has people associated with it (contacts), as well as, for lack of a better word, "deals" (opportunities).

In the nonprofit world, however, we don't really keep track of companies and deals. Instead, we keep track of households or organizations, and donations or grants. We realize that Salesforce can be a bit confusing at times, but if you keep the following Salesforce-versus-NPSP mapping in mind, then things should be a little easier.

- Accounts = Households (or Organizations)
- Contacts = Donors
- Opportunities = Donations

**TIP:** Some people like to customize the names of their tabs in Salesforce to reflect the above terminology for donor management (i.e., literally change the Opportunities tab to read “Donations”). If you want to do this, click Setup in the upper-right corner of Salesforce, then go to **Customize | Tab Names and Labels | Rename Tabs and Labels**, and make your changes. Keep in mind, however, that general Salesforce documentation will always refer to the Opportunities object (tab) as such.

## NPSP Donation Terminology

Remember, in Salesforce, we track all donation and grant information on the standard Salesforce **Opportunity** object. So anytime we refer to an “opportunity,” we are usually referring to a donation or grant. See the previous section for a fuller explanation.

## Opportunity

Generally a donation, but there are other “types” of opportunities as well. Here are the five types you can choose from in the Nonprofit Success Pack:

- Donation
- Grant
- Major Gift
- Matching Donation
- Membership

You designate a type for an opportunity when you create the opportunity, and a description of each type is available in the user interface. You can also configure the list to add or remove types, depending on your needs.

## Individual Donation

A donation that you create from the Contact record. The donation is a gift from a single person (contact), rather than from an entire household or organization.

## Household or Organization Donation

A donation that you create from the Household or Organization Account record. When you create a donation from the Household or Organization Account record, the entire Household (or Organization) is credited with the donation.

## Recurring Donation

A donation that occurs more than once, over a period of time. Recurring donations can be open-ended and continue in perpetuity, or they can be fixed-length donations (i.e. monthly, yearly, and so on), with a start and end date.

## Soft Credit

A soft credit is a credit for a donation that someone did not actually make themselves, and credits that someone as an “influencer” of the donation, rather than as the direct donor. Soft credits can take many forms. A classic example is the employer donation matching scenario, where an employer sends a matching gift of \$100 to nonprofit A on behalf of employee B. A soft credit on employee B’s Contact record in Salesforce shows that they were responsible for the employer’s donation of \$100, but that the employee did not make the donation directly.

## Opportunity Rollup

An Opportunity Rollup is a field that contains accumulated totals for something like donations over a period of time. Some examples include Total Number of Gifts, Total Household Gifts, Soft Credits This Year, and so on. You'll see Opportunity Rollups in the Donation Information sections of the Salesforce Account and Contact objects, though they are not explicitly referred to as such. Total Gifts, for example, is a total of all the gifts over a period of time, "rolled up" into one.



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