

NPSP: Manage Multiple-Payment Donations

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Payments Overview

Payments allow you to split a donation over a fixed period of time (a year, for example), and let you track the current and future payment amounts. This is particularly helpful when your donor households and organizations set up a multiple payout schedule for their donations or grants. For example, you might have a donation from an organization for \$1200, but the donation will be paid out quarterly (every three months). You can set up four \$300 payments for the total donation that you can track as paid or not paid, over time.

In NPSP 3.0 and later, all opportunities save new donations as payments by default, even single donations (i.e. donations paid in a “lump sum”). When you create a new opportunity and set the Stage field to **Posted**, Salesforce creates a payment for the full donation amount and records the donation as “paid in full”. If you want, you can override this behavior by selecting the Do Not Automatically Create Payment checkbox when you create the opportunity.

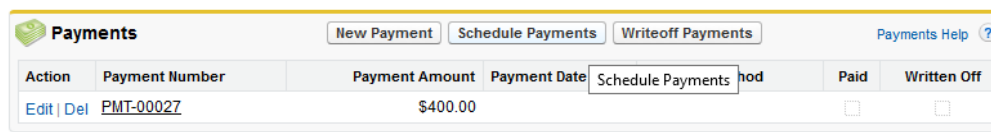
You can also turn off the payments behavior entirely. See [Disable Payments](#).

Split a Donation into Multiple Payments

You can track a donation using multiple payments if you'll be receiving the money in installments over a period of time. Tracking a donation in this way makes things very convenient when the same donor is making all the payments and you know the schedule in advance.

For example, if a donor has confirmed that they will donate \$100 quarterly this financial year (\$400 total), you can set up a donation with four payments for the calendar year.

1. Begin by creating a new opportunity for the lump sum amount that the donor has pledged (for example, the full \$400). You can create a brand new opportunity from the Opportunities tab in Salesforce, or create one from the Opportunities related list on the Contact or Account record (recommended). When you do the latter, Salesforce automatically pre-populates the new opportunity with related information.
2. Set the **Stage** field to **Pledged** (or any appropriate open stage).
3. Set the **Close Date** to some time beyond the anticipated last payment date. For example, in our quarterly example, if the first donation comes in on 10/7/2014, set the payment date to 10/7/2015.
4. Save the donation entry. (You should still be on the opportunity record. If you aren't, navigate to the opportunity you just created from the Opportunities tab.)
5. On the new opportunity record, scroll down to the Payments related list and click **Schedule Payments**.



The screenshot shows the 'Payments' section of a Salesforce interface. At the top, there are buttons for 'New Payment', 'Schedule Payments', and 'Writeoff Payments', along with a 'Payments Help' link. Below this is a table with columns: Action, Payment Number, Payment Amount, Payment Date, Schedule Payments, Paid, and Written Off. A single row is visible with the following data: 'Edit | Del' in the Action column, 'PMT-00027' in the Payment Number column, '\$400.00' in the Payment Amount column, and empty checkboxes in the Schedule Payments, Paid, and Written Off columns.

Action	Payment Number	Payment Amount	Payment Date	Schedule Payments	Paid	Written Off
Edit Del	PMT-00027	\$400.00		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. In the Create a Payment Schedule section:

- Set the **# of Payments** fields to 4 (quarterly). By default, you can schedule up to 12 payments for a single donation.
NOTE: Depending on the needs of your organization, you can change the maximum number of payments from the NPSP Settings page (**Donations | Payments | Maximum Payments**).
- Set the **Date of First Payment** to the starting date for your quarterly payments (the date when the first payment comes in).
- Set the payment **Interval** to the amount of time between scheduled payments. For quarterly payments, this value is 3 months.
- Select Credit Card, Checks, or Cash as the default **Payment Method** depending on the mode of donation.

Current Opportunity Info

Opportunity	Keith Harris- Donation 10/7/2014	Amount	\$400.00
Stage	Pledged	Payment Amount Received	\$0.00
Close Date	10/7/2015	Remaining Balance	\$400.00

Create a Payment Schedule

of Payments

4

How many individual payments.

Date of First Payment

10/7/2014

[10/7/2014]

Interval

3

Month

Time between payments.

Payment Method

Credit Card

Calculate Payments

7. Click Calculate **Payments**.

Salesforce creates an editable list of scheduled payments. For our quarterly donation example, the payment calculator will create 4 payments with the first payment scheduled on 10/7/2014, the second one scheduled three months later (payment interval) on 1/7/2015, and so on. At this point, you can adjust the payment amounts and dates on the payment schedule, if required; this is helpful, for example, when you know that the final payment will be a different amount, or if the third payment will come in on different date.

Payments to be Created						
Payment #	Amount	Scheduled Date		Paid Date		Paid?
1	100.00	10/7/2014	[10/7/2014]		[10/7/2014]	<input type="checkbox"/>
2	100.00	1/7/2015	[10/7/2014]		[10/7/2014]	<input type="checkbox"/>
3	100.00	4/7/2015	[10/7/2014]		[10/7/2014]	<input type="checkbox"/>
4	100.00	7/7/2015	[10/7/2014]		[10/7/2014]	<input type="checkbox"/>
Create Payments						

8. Click Create **Payments**. On the opportunity detail page, the Payments related list shows the payment schedule.

Payments						
		New Payment	Schedule Payments	Writeoff Payments	Payments Help ?	
Action	Payment Number	Payment Amount	Payment Date	Payment Method	Paid	Written Off
Edit Del	PMT-00028	\$100.00		Credit Card	<input type="checkbox"/>	<input type="checkbox"/>
Edit Del	PMT-00029	\$100.00		Credit Card	<input type="checkbox"/>	<input type="checkbox"/>
Edit Del	PMT-00030	\$100.00		Credit Card	<input type="checkbox"/>	<input type="checkbox"/>
Edit Del	PMT-00031	\$100.00		Credit Card	<input type="checkbox"/>	<input type="checkbox"/>

- When a payment comes in, click **Edit** next to the payment in the list of scheduled payments, select **Paid**, and then save your changes.
- When the final payment comes in and the full donation amount has been paid, set the Opportunity Stage field to **Posted** (or any appropriate closed/won stage.)

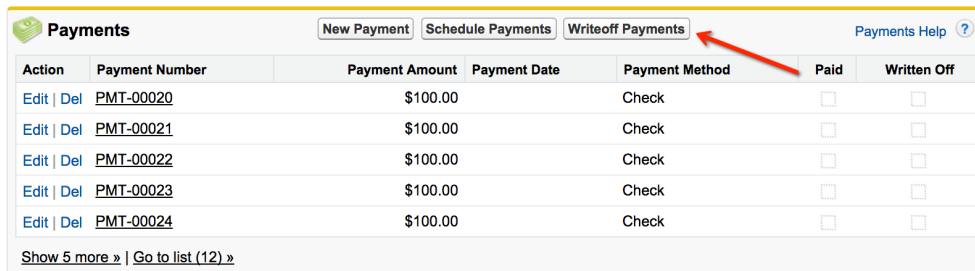
Write Off One or More Scheduled Payments

When donors pledge a certain amount and cannot keep the payment schedule, or are unable to send in one or more payments, you can write off (i.e. “cancel”) the payments you’re expecting so that you can keep accurate donation records.

- Search for the Opportunity that contains the payment you want to write off.
- On the Opportunity record, click **Edit** next to the payment.
- Select **Written Off**.
- Click **Save**.

If, unfortunately, a donor discontinues their payments entirely, write off all of their scheduled future payments to keep your donation records accurate.

- Search for the Opportunity that contains the payments you want to write off.
- In the Payments related list, click **Writeoff Payments**.



Payments						
New Payment		Schedule Payments		Writeoff Payments		Payments Help ?
Action	Payment Number	Payment Amount	Payment Date	Payment Method	Paid	Written Off
Edit Del	PMT-00020	\$100.00		Check	<input type="checkbox"/>	<input type="checkbox"/>
Edit Del	PMT-00021	\$100.00		Check	<input type="checkbox"/>	<input type="checkbox"/>
Edit Del	PMT-00022	\$100.00		Check	<input type="checkbox"/>	<input type="checkbox"/>
Edit Del	PMT-00023	\$100.00		Check	<input type="checkbox"/>	<input type="checkbox"/>
Edit Del	PMT-00024	\$100.00		Check	<input type="checkbox"/>	<input type="checkbox"/>
Show 5 more » Go to list (12) »						

- On the Writeoff Remaining Payments page, look at the date in the Writeoff Payments section. By default Salesforce shows you the current date, and will write off all remaining payments. If you want to choose a later date after which you want to write off payments, you can enter it.
- Click **Writeoff Payments**. Back on the Opportunity record, you’ll see that Salesforce has automatically summed up the remaining unpaid payments and displayed them as a single unpaid write off.
- Lastly, click **Edit** on the Opportunity, and change the Opportunity amount from the original pledge to the actual amount you received. You should also change the Opportunity Stage to **Posted** to close out the donation.

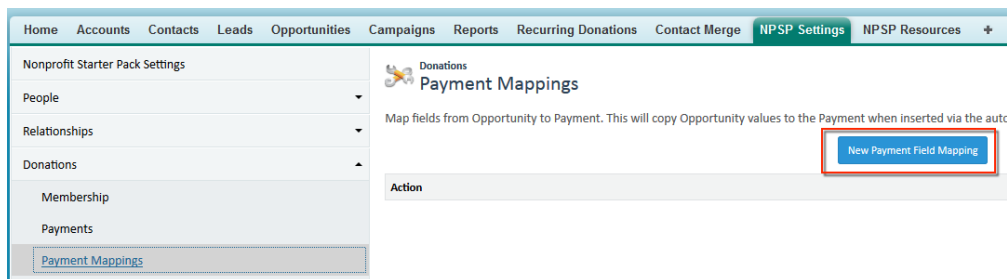
Map Opportunity Fields to Payment Fields

NOTE: This topic is slightly more advanced, and presumes that you know how to work with custom fields in Salesforce.

Use Payment Mappings to automatically copy values from Opportunity record fields to Payments, whenever you create a new payment. You may want to do this so that details from the Opportunity record appear in the Payment record as well for easy reference or billing. Salesforce executes the mapping for both automatically added Payments, as well as Payments created through the Payment scheduler. Manually created single Payments will not use the mappings defined here.

Payment mapping **requires that you have two fields (one on Opportunity, one on Payment) of a matching type in order to create a mapping between them.** When you create a mapping, information from an Opportunity field displays in the mapped Payment field, but not vice versa. In other words, information from Opportunity fields can appear in Payments but not the other way around.

1. In the NPSP settings tab, go to **Donations | Payment Mappings**.
2. Click **New Payment Field Mapping**.



3. In the Opportunity Field list, select the Opportunity object field you want to map from. Once selected, all the fields of the matching data type on the Payments object are shown in the Payment Field list.
4. From the Payment Field list, select the Payment field you want to map to.

In the example below, the administrator has created a new field in the Payment Object called Member Level Map. When you select Member Level from the Opportunity Field list, this new field appears as a choice in the Payment Field section. Note that the field Payment Method also appears; this is because it is the same data type as the Member Level field from the Opportunity.

Donations
Payment Mappings

Map fields from Opportunity to Payment. This will copy Opportunity values to the Payment when inserted via the automatic payment creation or payment scheduler.

NEW PAYMENT FIELD MAPPING

Select the Opportunity field to be mapped, and the Payment field it maps to.

Opportunity Field

Do Not Automatically Create Payment
Is Opp From Individual
Member Level
Membership End Date
Membership Origin
Membership Start Date

The Opportunity field to copy from.

Payment Field

Member Level Map
Payment Method

The Payment field to copy into.

Note this section is empty until you choose an Opportunity Field.

Create Custom Mapping
Cancel

5. Click the **Create Custom Mapping** button to complete your mapping.

The next time a payment is created in this organization, the Member Level from the Opportunity displays in the Member Level Map field in the Payment details .

Disable Payments

If you don't want a payment or payments automatically created for your new Opportunity records, you can disable Payments in NPSP Settings.

1. In the Nonprofit Success Pack, click the NPSP Settings tab.
2. Click **Donations | Payments**.
3. Click **Edit** on top of the page.
4. Deselect **Payments Enabled** and save your changes.



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