

NPSP: Configure Soft Credit and Matching Gift Rollup Settings

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About Soft Credit Rollups and Opportunity Contact Role Settings

The Soft Credit rollup fields on Contact records “roll up” as the result of data they receive from two sources:

- Opportunity Contact Roles (OCRs) you’ve assigned to Contacts on Opportunity records
- Configuration in the Contact Roles section of the NPSP Settings Tab

Any Contact Role record on an Opportunity that does not have the Primary box checked is eligible for soft credit rollups if that value is specified in NPSP Settings.

Contact Roles New							Contact Roles Help ?
Action	Contact Name	Account Name	Email	Phone	Role	Primary	
Edit Del	Harry Peters	Harry and Grace Peters Family			Donor	<input checked="" type="checkbox"/>	
Edit Del	Grace Peters	Harry and Grace Peters Family			Household Member	<input type="checkbox"/>	
Edit Del	Reginald Walters	Reginald Walters Family			Soft Credit	<input type="checkbox"/>	

Non-Primary
Contact Roles
are Soft Credit

Primary check
means Hard
Credit

Add Opportunity Contact Role Values

The Nonprofit Success Pack comes with six Opportunity Contact Roles out-of-the-box:

- Decision Maker
- Donor
- Household Member
- Influencer
- Soft Credit

- Matched Donor

But you can add others to meet your organization's needs.

1. From Setup, enter `Contact Roles` in the Quick Find box, then select **Contact Roles on Opportunity** from the Opportunity menu.
2. Click **New** and add values you will want to select such as `Solicitor`, `Grant Officer`, and so on.

Configure Contact Roles Settings in the NPSP Settings Tab

Go to the **NPSP Settings** tab, and under **Donations | Contact Roles**, make sure you've specified which Contact Role values you want treated as soft credits and therefore rolled up on Contact records.

In the Matched Donor Role setting, you'll also need to specify which contact role you want the NPSP to apply to matched donors. This role should be one of the roles you selected for Soft Credit Roles. We recommend using Matched Donor.

SOFT CREDIT SETTINGS

Enable Soft Credit Rollups



Allows you to rollup closed Opportunity totals based on Opportunity Contact Role Roles. Soft credit rollups happen only in the nightly batch job, and not on triggers. They can be manually run using the Rollup Donations Batch tab.

Soft Credit Roles

Other
Donor
Soft Credit
Household Member
Matched Donor

List of Opportunity Contact Role roles to include in soft credit rollups.

Matched Donor Role

Matched Donor

Select the Contact Role for Matched Donors.



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