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# NPSP: Create Soft Credits

This article contains these sections:

- Full Soft Credits Versus Partial Soft Credits
- Assign Full Soft Credits
- Assign Partial Soft Credits
- Enable Automatic Household Member Soft Credits

## Full Soft Credits Versus Partial Soft Credits

There are two kinds of soft credits in the Nonprofit Success Pack:

A **full soft credit** is a soft credit for the entire amount of the donation. For example, Mary gives \$100, Company Awesome matches \$100, Mary gets soft credit for Company Awesome's \$100 donation.

A **partial soft credit** is a soft credit for an amount that is only a portion of the larger donation. For example, organizations like Network for Good and United Way collect donations on behalf of an organization's constituents, and typically share them with nonprofits on a regular basis (monthly or quarterly). The nonprofit creates a single Opportunity record for the larger check received, but needs to soft credit its individual constituents accordingly.

**NOTE:** *Partial soft credits are also important for matching gifts, but we'll talk about that in another section.*

All Soft Credit attributions appear in the Contact Roles related list on an Opportunity. However, if the Opportunity includes partial soft credits, then the Soft Credit attribution **also** appears in the Opportunity's Partial Soft Credits related list.

▼ Donation Information						
Opportunity Name	Network for Passthrough Donations 2016-01-29 \$1000			Private	<input type="checkbox"/>	
Account Name	Network for Passthrough Donations			Primary Campaign Source		
Primary Contact				Recurring Donation		
Amount	\$1,000.00			Stage	Closed Won	
Close Date	1/29/2016			Probability (%)	100%	
Lead Source				Batch		
Type				Acknowledgment Status		
Description				Acknowledgment Date		

Contact Roles						
New			Contact Roles Help ?			
Action	Contact Name	Account Name	Email	Phone	Role	Primary
Edit   Del	Franklin Blue	Franklin Blue Family			Soft Credit	<input type="checkbox"/>
Edit   Del	Grace Peters	Harry and Grace Peters Family			Soft Credit	<input type="checkbox"/>
Edit   Del	Lisa Smith	Lisa Smith Family			Soft Credit	<input type="checkbox"/>
Edit   Del	Reginald Walters	Reginald Walters Family			Soft Credit	<input type="checkbox"/>

Partial Soft Credits				
Manage Soft Credits				
Partial Soft Credits Help ?				
Action	Contact Name	Account Name	Role Name	Amount
Edit   Del	Franklin Blue	Franklin Blue Family	Soft Credit	\$140.00
Edit   Del	Grace Peters	Harry and Grace Peters Family	Soft Credit	\$400.00
Edit   Del	Lisa Smith	Lisa Smith Family	Soft Credit	\$20.00
Edit   Del	Reginald Walters	Reginald Walters Family	Soft Credit	\$340.00

\$140, rather than the entire \$1000 Opportunity, rolled up to Franklin Blue's Contact record.

In the above example, we're using the "Soft Credit" Contact Role to track Partial Soft Credits on Opportunities. The screen shot shows a single \$1000 donation that's come in from Network for Passthrough, with Soft Credit Contact Roles assigned to the four donors responsible for the aggregate donation. In the Partial Soft Credits related list, you can also see the amount that each individual gave, and thus the amount that will be rolled up to the Soft Credits section of each donor's Contact record.

It's perfectly fine and expected to see the same soft credit listed in both the Contact Role and Partial Soft Credits related lists. **Every Partial Soft Credit record should have a corresponding Contact Role record.** Not every Contact Role record will have a corresponding Partial Soft Credit record.

## Assign Full Soft Credits











The Nonprofit Success Pack creates soft credits based on Opportunity Contact Roles, and the settings you've specified in NPSP Settings. If you haven't read the Soft Credits Overview (/articles/Resource/NPSP-Soft-Credits-Overview) and Configure Soft Credit and Matching Gift Rollup Settings (/articles/Resource/NPSP-Configure-Soft-Credit-and-Matching-Gift-Rollup-Settings), you should do so before proceeding.

**❗ IMPORTANT:** *For soft credits to roll up from the Opportunity to the Contact's record, the Opportunity must be of a type that rolls up. In general you should not need to worry about this, unless you've excluded specific Opportunity types or record types from rolling up.*

1. Navigate to an Opportunity record.
2. Scroll down to the **Contact Role** related list and click **New**.

3. On a row where the Role is set to --None--, click the Contact lookup icon and select the Contact to whom you want to assign the soft credit.
4. Set the **Role** to the correct value. It should be a role that's been configured to receive soft credits.
  - ❗ **IMPORTANT:** Make sure the **Primary** radio button is **not** selected for the Contact. Even if you select a role where the donor should receive soft credit, Salesforce will hard credit the Contact if the Contact is designated as Primary.
5. Once you've selected all contacts and assigned roles, click **Save**.

## Contact Roles for Harry Peters 2015-06-16 \$80

Primary	Contact	Role
<input type="radio"/>	No Primary Contact	
<input checked="" type="radio"/>	Harry Peters 	Donor 
<input type="radio"/>	Grace Peters 	Household Member 
<input type="radio"/>	Franklin Blue 	Influencer 
<input type="radio"/>	Reginald Walters 	Influencer 
<input type="radio"/>		--None-- 

## Assign Partial Soft Credits

The Nonprofit Success Pack creates soft credits based on Opportunity Contact Roles, and the settings you've specified in NPSP Settings. If you haven't read the Soft Credits Overview (</articles/Resource/NPSP-Soft-Credits-Overview>) and Configure Soft Credit and Matching Gift Rollup Settings (</articles/Resource/NPSP-Configure-Soft-Credit-and-Matching-Gift-Rollup-Settings>), you should do so before proceeding.

❗ **IMPORTANT:** For soft credits to roll up from the Opportunity to the Contact's record, the Opportunity must be of a type that rolls up. In general you should not need to worry about this, unless you've excluded specific Opportunity types or record types from rolling up.

1. Navigate to an Opportunity record.
2. At the top of the page, click the **Manage Soft Credits** button. You should see all of the Contacts who have Contact Roles already assigned on this Opportunity. You may also see no Contacts listed if no Contact Roles have been assigned.

3. Assign Partial Soft Credits by clicking the **Partial** radio button for the appropriate Contact, and entering the amount for their partial soft credit.

OPPORTUNITIES > ORANGE COMPANY MATCHING GIFT 2016-01-27 \$75

### Manage Soft Credits

2 items

Save Cancel

Primary Donor	Total Amount	Soft Credit Amount	Total Unaccounted	SOFT CREDIT RESTRICTIONS <input checked="" type="radio"/> Amount <input type="radio"/> Percent <input type="checkbox"/> Allow Soft Credit Amount more than Total Amount
Orange Company	\$75.00	\$75.00	\$0.00	

CONTACT	ROLE NAME	TYPE		AMOUNT OR PERCENT
Franklin Blue	Soft Credit	<input type="radio"/> Full	<input checked="" type="radio"/> Partial	50.00
Lisa Smith	Soft Credit	<input type="radio"/> Full	<input checked="" type="radio"/> Partial	25.00

[Add another soft credit](#)

**NOTE:** You **MUST** have the **Partial** radio button selected to enter soft credit amounts. Selecting the **Full** radio button populates the Amount field with 100% of the Opportunity. This amount will not be editable.

4. Additionally, you can click the **Add another soft credit** link at the bottom of the Contacts list, browse to more Contacts, and assign them partial soft credits as well.

OPPORTUNITIES > ORANGE COMPANY MATCHING GIFT 2016-01-27 \$75

### Manage Soft Credits

2 items

Save Cancel

Primary Donor	Total Amount	Soft Credit Amount	Total Unaccounted	SOFT CREDIT RESTRICTIONS <input checked="" type="radio"/> Amount <input type="radio"/> Percent <input type="checkbox"/> Allow Soft Credit Amount more than Total Amount
Orange Company	\$75.00	\$50.00	\$25.00	

CONTACT	ROLE NAME	TYPE		AMOUNT OR PERCENT
Franklin Blue	Soft Credit	<input type="radio"/> Full	<input checked="" type="radio"/> Partial	25.00
Lisa Smith	Soft Credit	<input type="radio"/> Full	<input checked="" type="radio"/> Partial	25.00
Grace Peters	Soft Credit	<input type="radio"/> Full	<input checked="" type="radio"/> Partial	25.00

[Add another soft credit](#)

**NOTE:** When adding new Partial Soft Credits, you'll only be able to select Contact Roles that are eligible for soft credit rollups.

5. (Optional) Select **Allow Soft Credit Amount more than Total Amount** if you need to credit Contacts for more than the Opportunity Amount. For example, if you have 2 Contacts who should receive Influencer soft credit for the entire \$1000 Amount of the Opportunity, and a third Contact who is only credited for \$100, that would bring the total soft credit amount to \$2100 on a \$1000 gift.

## Enable Automatic Household Member Soft Credits

**❗ IMPORTANT:** *You should be familiar with everything in [Configure Soft Credit and Matching Gift Rollup Settings \(/articles/Resource/NPSP-Configure-Soft-Credit-and-Matching-Gift-Rollup-Settings\)](/articles/Resource/NPSP-Configure-Soft-Credit-and-Matching-Gift-Rollup-Settings) before proceeding.*

The NPSP provides a unique type of soft credit for Households—the Household Member soft credit. With Household Member soft credits, everyone in the Household receives a soft credit for a donation made by anyone else in the Household. For more information and examples, see the [Soft Credits Overview \(/articles/Resource/NPSP-Soft-Credits-Overview\)](/articles/Resource/NPSP-Soft-Credits-Overview).

**TIP:** *When creating a new donation, assign the Primary Contact Role to the individual in the Household who “signed the check,” and then let the NPSP assign Household Member Contact Roles to everyone else in the Household.*

1. In the **NPSP Settings** tab, click **Donations | Contact Roles**, and then click **Edit**.
2. Scroll down to the **Household Opportunity Contact Roles** section.
3. If it is not already selected, select **Household Contact Roles On**.
4. In the **Household Member Contact Role** field, select the Contact Role you want to use for automatic soft crediting. We recommend selecting the default, Household Member.
5. (Optional) In the **Household OCR Excluded Record Types** picklist, select any Contact Roles you want to exclude from automatic Household soft crediting. For example, you might use a different Contact Role for children so that you can exclude children from automatic soft crediting whenever a parent makes a donation.

**NOTE:** *When you exclude a record type from automatic Household soft crediting, Salesforce still creates a Household Member Opportunity Contact Role for the Contact, but does not roll up the donation Amount to the Contact’s record.*

6. When you’re finished, click **Save**.



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