

NPSP: Soft Credit and Matching Gift Setup

The Matching Gifts feature and enhanced Soft Credits fields are available by default in NPSP 3.63 and later. If you started using NPSP prior to version 3.63, you'll need to do the following:

- Enable Matching Gift and Soft Credit Fields
- Enable Partial Soft Credit Object
- Configure Page Layouts
- Enable Opportunity Picklist Field for Record Types

If you started using the NPSP after version 3.63, you can skip this entire section and move on to [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).

Enable Matching Gift and Soft Credit Fields

Double check that System Administrators and relevant Profiles/Permission Sets have access to these fields. (See [Enable New Features \(/articles/Resource/NPSP-Enable-New-Features\)](/articles/Resource/NPSP-Enable-New-Features) for general instructions on how to enable new features in the Nonprofit Success Pack.)

Account Object:

- Matching Gift Administrator Name
- Matching Gift Amount Max
- Matching Gift Amount Min
- Matching Gift Annual Employee Max
- Matching Gift Comments
- Matching Gift Company
- Matching Gift Email
- Matching Gift Info Updated
- Matching Gift Phone
- Matching Gift Percent
- Matching Gift Request Deadline

Contact Object:

NPSP has had 5 soft credit rollup fields for some time. Now there are more!

- First Soft Credit Amount
- First Soft Credit Date
- Largest Soft Credit Amount
- Largest Soft Credit Date
- Last Soft Credit Amount
- Last Soft Credit Date
- Number of Soft Credits
- Number of Soft Credits Last N Days
- Number of Soft Credits Last Year
- Number of Soft Credits This Year
- Number of Soft Credits Two Years Ago

Opportunity Object:

- Matching Gift
- Matching Gift Account
- Matching Gift Employer
- Matching Gift Status

Enable Partial Soft Credit Object

You'll need to make sure that the new **Partial Soft Credit** Object is accessible to all Profiles that also have access to Opportunities. Profiles should be granted the same access to the **Partial Soft Credit** Object as they are granted for Opportunities. For example, this is the System Administrator Profile:

Profile

System Administrator

Find Settings...



Clone

Edit Properties

[Profile Overview](#) > [Object Settings](#)



Partial Soft Credits



Partial Soft Credits

Edit

Record Types and Page Layout Assignments

Record Types	Page Layout Assignment
—Master—	Partial Soft Credit Layout

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All	<input checked="" type="checkbox"/>
Modify All	<input checked="" type="checkbox"/>

Configure Page Layouts

You're free to configure page layouts however you want, but here are the layouts and configuration we suggest. (For more information, see the page layouts documentation (https://help.salesforce.com/apex/HTViewHelpDoc?id=customize_layout.htm&language=en_US) in Salesforce Help & Training.)

Contact Page Layout:

Soft Credit Totals						
🔒	Soft Credit Total	\$123.45		🔒	Number of Soft Credits	46,057
🔒	Soft Credit Last N Days	\$123.45		🔒	Number of Soft Credits Last N Days	81,486
🔒	Soft Credit This Year	\$123.45		🔒	Number of Soft Credits This Year	94,247
🔒	Soft Credit Last Year	\$123.45		🔒	Number of Soft Credits Last Year	59,109
🔒	Soft Credit Two Years Ago	\$123.45		🔒	Number of Soft Credits Two Years Ago	18,198
🔒	Largest Soft Credit Amount	\$123.45		🔒	Largest Soft Credit Date	1/25/2016
🔒	First Soft Credit Amount	\$123.45		🔒	First Soft Credit Date	1/25/2016
🔒	Last Soft Credit Amount	\$123.45		🔒	Last Soft Credit Date	1/25/2016

Account Page Layout:

For Matching Gifts, we recommend that you edit the layout associated with the Organization record type only.

Matching Gift Information			
Matching Gift Company	✓	Matching Gift Info Updated	1/26/2016
Matching Gift Percent	100.00%	Matching Gift Annual Employee Max	\$5,000.00
Matching Gift Administrator Name	Melissa Drape	Matching Gift Amount Max	\$5,000.00
Matching Gift Email	melissa@company.com	Matching Gift Amount Min	\$25.00
Matching Gift Phone	(555) 123-4567	Matching Gift Request Deadline	within 60 days
Matching Gift Comments			

Opportunity Page Layouts:

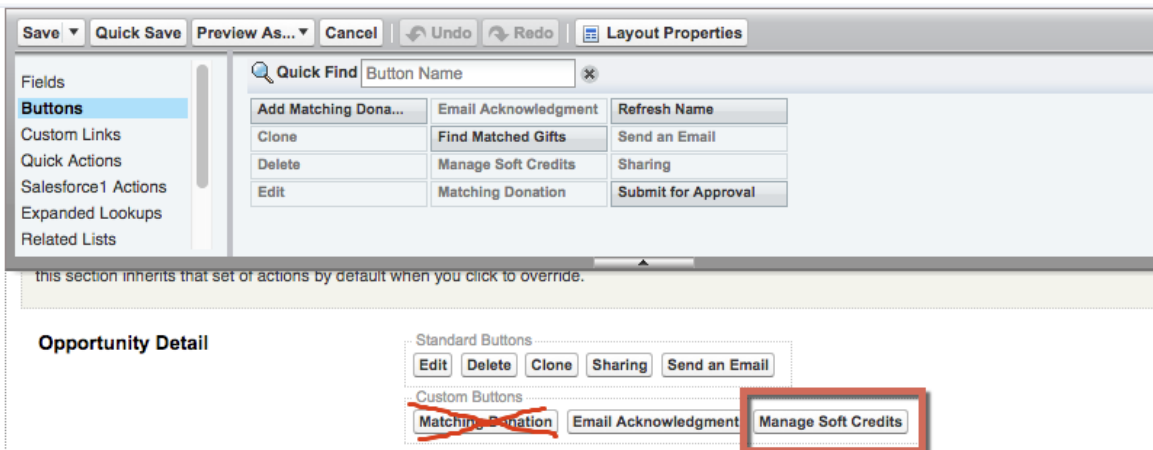
We recommend that you add the new Partial Soft Credits Related List directly below the standard Contact Roles Related List, as shown:

Related Lists			
Contact Roles This list is not customizable			
Partial Soft Credits Manage Soft Credits			
Partial Soft Credit: Contact Name	Account: Account Name	Partial Soft Credit: Role Name	Partial Soft Credit: Amount
Sample Partial Soft Credit: Contact Name	Sample Account: Account Name	Sample Partial Soft Credit: Role Name	\$123.45

In the record detail section on your Page Layout for one-time Donations, add the Matching Gift fields, as shown:

Matching Gift Information			
Matching Gift Employer	Sample Matching Gift Employer	Matching Gift Status	Sample Matching Gift Status
Matching Gift Account	Sample Account	Matching Gift	Sample Opportunity

You'll also want to add the top level Manage Soft Credits button to the Opportunity page layout's Custom Button section. Additionally, we recommend that you remove the deprecated Matching Donation button from your page layouts. (The Matching Donation button used to simply clone the Opportunity with an option to create the duplicate in a different record type, but did not let you connect the original donor's gift with the matching gift.)



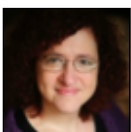
Finally, we recommend a dedicated Sales Process, Record Type, and Page Layout for Matching Gifts from Organizations. The NPSP provides a Matching Gift Page Layout for you. Assign that Layout to your Matching Gift record type.

Enable Opportunity Picklist Field for Record Types

When you add new fields to a page layout, you may find that they're greyed out when you try and use them. This is because you need to specifically enable picklist fields for Record Types.

To enable picklists for a Record Type:

1. From the Setup Menu, enter **Record Type** in the Quick Find box, then select **Record Types** from the Opportunities menu.
2. Click on the Record Type whose Page Layout contains the Matching Gift fields added in the previous section (for example, **Donation**).
3. Scroll to the **Picklists Available for Editing** section.
4. Click **Edit** to the left of **Matching Gift Status**.
5. Add all Available Fields to the **Selected Fields** side by clicking the right-facing arrow.
6. Click **Save**.



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(/_ui/core/userprofile/UserProfilePage?u=005800000008mIFIAAA) to contribute to the project.
(/_ui/core/userprofile/UserProfilePage?u=005800000008mIFIAAA) salesforce.com



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