

[Facebook](#)[Tweet](#)[LinkedIn](#)[Google+](#)[Email](#)

NPSP: Soft Credits Overview

This article contains these sections:

- [Soft Credits Versus Hard Credits](#)
- [Soft Credits and Opportunity Contact Roles](#)
- [Household Soft Credits](#)
- [A Word About the Nightly Batch . . .](#)

Soft Credits Versus Hard Credits

A *soft credit* is a credit for a donation that a contact or donor did not actually make, but may have somehow influenced. A common example of a soft credit is credit for a matching gift: Jane Smith gives \$100 to your organization, and her company matches the \$100, resulting in a \$200 donation. In the Nonprofit Success Pack, you can track the first \$100 as a hard credit (the actual money that came from Jane), and the matched \$100 as a “soft” credit because Jane influenced, but did not literally donate, the money.

In the Nonprofit Success Pack, soft credits and soft credit rollups (i.e. the aggregate totals of different categories of soft credits) are tracked on the Contact record. There are many of them, and they look like this:

▼ Donation Information			
First Gift Date	6/16/2015	Last Gift Amount	\$100.00
Last Gift Date	1/25/2016	Largest Gift	\$400.00
Average Gift	\$193.33	Smallest Gift	\$80.00
Best Gift Year	2015	Best Gift Year Total	\$480.00
▼ Donation Totals			
Total Gifts	\$580.00	Total Number of Gifts	3
Total Gifts Last N Days	\$580.00	Number of Gifts Last N Days	3
Total Gifts This Year	\$100.00	Number of Gifts This Year	1
Total Gifts Last Year	\$480.00	Number of Gifts Last Year	2
Total Gifts Two Years Ago	\$0.00	Number of Gifts Two Years Ago	0
▼ Soft Credit Totals			
Soft Credit Total	👉 \$1,000.00	Number of Soft Credits	1
Soft Credit Last N Days	👉 \$1,000.00	Number of Soft Credits Last N Days	1
Soft Credit This Year	👉 \$1,000.00	Number of Soft Credits This Year	1
Soft Credit Last Year	👉 \$0.00	Number of Soft Credits Last Year	0
Soft Credit Two Years Ago	👉 \$0.00	Number of Soft Credits Two Years Ago	0
Largest Soft Credit Amount	\$1,000.00	Largest Soft Credit Date	1/25/2016
First Soft Credit Amount	\$1,000.00	First Soft Credit Date	1/25/2016
Last Soft Credit Amount	\$1,000.00	Last Soft Credit Date	1/25/2016
▼ Household Donation Info			
Total Household Gifts	\$580.00	Last Household Gift Date	1/25/2016
Total Household Gifts This Year	\$100.00		
Total Household Gifts Last Year	\$480.00		

Soft credits are great because they give you a more complete picture of your donors and the activity they might be helping to generate for your organization. But how do you control soft credits? Who gets them, and when?

To understand how soft credits work, you must also understand another related concept: **Opportunity Contact Roles . . .**

Soft Credits and Opportunity Contact Roles

An Opportunity Contact Role (OCR) is basically just that—a “role” you assign to a Contact on a particular Opportunity (donation) record. For example, Contact A might be the Donor on an opportunity, while Contact B might have been an Influencer. You want to capture both of these contacts, and their different roles, on the Opportunity record because both contacts had something to do with the donation.

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 create as many as you want. You might want a contact role for Foundation Officer, another for Office Staff, another for Alumni Parent, and so on. OCRs are completely customizable, and they exist to help you better organize your donors and donations.

But how do they relate to soft credits?

Well, they relate *completely*. Soft credits take their cue, as it were, from Opportunity Contact Roles, not from contacts. And this is where soft credit configuration gets a little tricky. In a nutshell, **if you set an OCR to receive soft credit, then any Contact assigned that OCR receives a soft credit**. If you **don't** set an OCR to receive soft credit, then any contact assigned that OCR does not receive soft credit.

Let's take a look at a real world scenario. Mr. Blue has donated \$100 to your organization, and his company matches dollar for dollar. We want to make sure that Mr. Blue receives a soft credit for the \$100 that his company donates, in addition to the \$100 (hard credit) that he donated.

In the Nonprofit Success Pack, it goes something like this:



**\$100 Donation
from Corporation
(New Opportunity Record)**



Mr. Blue added to Opportunity's Contact Role related list

Mr. Blue's Contact Role set to Influencer

Influencer Contact Role (already) set to receive soft credit in NPSP Settings

Here's what it looks like in the Contact Role related list of the Opportunity record:

Contact Roles New Contact Roles Help ?						
Action	Contact Name	Account Name	Email	Phone	Role	Primary
Edit Del	Franklin Blue	Franklin Blue Family			Influencer	<input type="checkbox"/>

And here's what everything looks like in the Soft Credits rollup section of Mr. Blue's Contact record:

▼ Contact Details			
Name	Franklin Blue	Private	<input type="checkbox"/>
Account Name	Franklin Blue Family	Birthdate	
Primary Affiliation			
Title			
Description			
▼ Donation Information			
First Gift Date	8/17/2015	Last Gift Amount	\$100.00
Last Gift Date	8/17/2015	Largest Gift	\$100.00
Average Gift	\$100.00	Smallest Gift	\$100.00
Best Gift Year	2015	Best Gift Year Total	\$100.00
▼ Donation Totals			
Total Gifts	\$100.00	Total Number of Gifts	1
Total Gifts Last N Days	\$100.00	Number of Gifts Last N Days	1
Total Gifts This Year	\$0.00	Number of Gifts This Year	0
Total Gifts Last Year	\$100.00	Number of Gifts Last Year	1
Total Gifts Two Years Ago	\$0.00	Number of Gifts Two Years Ago	0
▼ Soft Credit Totals			
Soft Credit Total	\$100.00	Number of Soft Credits	1
Soft Credit Last N Days	\$100.00	Number of Soft Credits Last N Days	1
Soft Credit This Year	\$100.00	Number of Soft Credits This Year	1
Soft Credit Last Year	\$0.00	Number of Soft Credits Last Year	0
Soft Credit Two Years Ago	\$0.00	Number of Soft Credits Two Years Ago	0
Largest Soft Credit Amount	\$100.00	Largest Soft Credit Date	1/26/2016
First Soft Credit Amount	\$100.00	First Soft Credit Date	1/26/2016
Last Soft Credit Amount	\$100.00	Last Soft Credit Date	1/26/2016
▼ Household Donation Info			
Total Household Gifts	\$100.00	Last Household Gift Date	8/17/2015
Total Household Gifts This Year	\$0.00		
Total Household Gifts Last Year	\$100.00		

In this particular case, making sure that the Influencer Contact Role is set to receive soft credit in NPSP Settings is very important. If it isn't, you wind up with this:

▼ Contact Details

Name	Franklin Blue	Private	
Account Name	Franklin Blue Family	Birthdate	
Primary Affiliation			
Title			
Description			

► Contact Information

► Address Information

► Household Address

▼ Donation Information

First Gift Date	8/17/2015	Last Gift Amount	\$100.00
Last Gift Date	8/17/2015	Largest Gift	\$100.00
Average Gift	\$100.00	Smallest Gift	\$100.00
Best Gift Year	2015	Best Gift Year Total	\$100.00

▼ Donation Totals

Total Gifts	\$100.00	Total Number of Gifts	1
Total Gifts Last N Days	\$100.00	Number of Gifts Last N Days	1
Total Gifts This Year	\$0.00	Number of Gifts This Year	0
Total Gifts Last Year	\$100.00	Number of Gifts Last Year	1
Total Gifts Two Years Ago	\$0.00	Number of Gifts Two Years Ago	0

▼ Soft Credit Totals

Soft Credit Total	\$0.00	Number of Soft Credits	0
Soft Credit Last N Days	\$0.00	Number of Soft Credits Last N Days	0
Soft Credit This Year	\$0.00	Number of Soft Credits This Year	0
Soft Credit Last Year	\$0.00	Number of Soft Credits Last Year	0
Soft Credit Two Years Ago	\$0.00	Number of Soft Credits Two Years Ago	0
Largest Soft Credit Amount	\$0.00	Largest Soft Credit Date	
First Soft Credit Amount	\$0.00	First Soft Credit Date	
Last Soft Credit Amount	\$0.00	Last Soft Credit Date	

▼ Household Donation Info

Total Household Gifts	\$100.00	Last Household Gift Date	8/17/2015
Total Household Gifts This Year	\$0.00		
Total Household Gifts Last Year	\$100.00		



So why do we have to go and set all these options in the first place? Well it's true, in the above example, we wanted the NPSP to automatically assign soft credits to anyone with the Influencer Contact Role. But sometimes you might have a contact role for which you do not want to recognize soft credits. For example, you might have a contact role (Instructor, Colleague, or other constituent) for people you want to associate with donations, but who had nothing to do with raising the money. You need those contact roles to exist so that you can attach them to Opportunity records, but you also need to be able to specify whether that contact role gets a soft credit or not. The Nonprofit Success Pack lets you do all this.

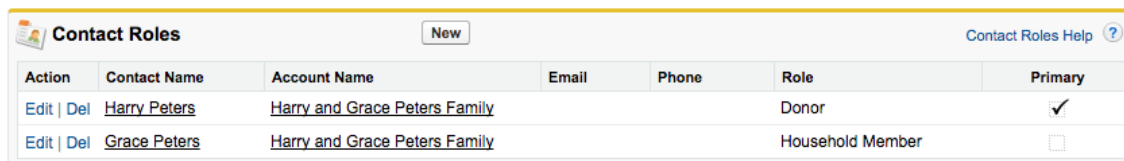
You configure OCRs, and which ones should receive soft credits, in NPSP Settings. (We talk about the nuts and bolts of that later.) In essence, you need to remember two very important things about soft credits:

- The Nonprofit Success Pack bases soft credits on Opportunity Contact Roles, not Contacts.
- You must set whether an OCR gets soft credited or not in NPSP Settings.

Household Soft Credits

There is yet another type of soft credit that's unique to the NPSP—Household Member soft credits. This functionality is available to those using Nonprofit Success Pack and the Household Account model.

With Household Member soft credits, everyone in the Household receives a soft credit for a donation made by anyone else in the Household. The typical example is Spouse 2 receiving a soft credit for a donation made by Spouse 1, where Spouse 1 is specified as the Donor on the Opportunity, and Spouse 2 is specified as the Household Member.



The screenshot shows the 'Contact Roles' table in Salesforce. It has a 'New' button and a 'Contact Roles Help' link. The table has columns for Action, Contact Name, Account Name, Email, Phone, Role, and Primary. Two rows are visible: one for 'Harry Peters' as a 'Donor' (Primary) and one for 'Grace Peters' as a 'Household Member' (not Primary).

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"/>

The nice thing about Household Soft Credits in the NPSP is that they happen automatically—you don't have to set them. As long as you have Household Soft Credits turned on, and you've specified a contact role for household members (it's the Household Member Contact Role by default), all members of a Household automatically get soft credited anytime someone else in the Household makes a donation.

Contact Roles
Campaign Members
Batch Data Entry
Rollup Donations Batch
Rollup Allocations Batch
User Defined Rollups
Recurring Donations
System Tools

Soft Credit Roles Soft Credit;Household Member;Matched Donor;Influencer
List of Opportunity Contact Role roles to include in soft credit rollups.

Matched Donor Role Matched Donor
Select the Contact Role for Matched Donors.

HOUSEHOLD OPPORTUNITY CONTACT ROLES

Create automatic Opportunity Contact Roles for Household members of the primary donor

Household Contact Roles On ☒

Check this field to create automatic Contact Roles for Household members of the Primary Contact

Household Member Contact Role Household Member
Select the Contact Role for Household Members

Household OCR Excluded Record Types

Contact Record Types excluded from Household Opportunity Contact Role creation

Additionally, you can specify an exclusionary Contact Record Type if you don't want a certain type of Contact to receive automatic Household soft credits (children, for instance) appearing on their Contact record. The Opportunity Contact Role record will still be created for all Household Members, but this setting allows you to exclude the values from the Contact summary data.

A Word About the Nightly Batch . . .

The Nonprofit Success Pack calculates soft credit rollups in its nightly batch, so you won't see an immediate change to a Contact's soft credit rollup fields right after you assign them a soft-credit-qualified Contact Role. If you need to recalculate soft credits outside of the nightly batch, you can manually run the Rollup Donations Batch (**NPSP Settings | Donations | Rollup Donations Batch**).

[Home](#)
[Accounts](#)
[Contacts](#)
[Leads](#)
[Opportunities](#)
[Campaigns](#)
[Reports](#)
[Recurring Donations](#)
[Contact Merge](#)
[NPSP Settings](#)
[Getting Started](#)

Nonprofit Starter Pack Settings
People
Relationships
Donations
Opportunity Names
Membership
Payments
Payment Mappings
GAU Allocations
Donor Statistics
Contact Roles
Campaign Members
Batch Data Entry
Rollup Donations Batch
Rollup Allocations Batch
User Defined Rollups
Recurring Donations
System Tools

Donations

Rollup Donations Batch

Use this page to rollup totals for all closed Opportunities, saving the results in Contact, Household, and Organization records. The process may take some time; you can close this page and the process will continue in the background.

Run Batch

Doing this will recalculate all of the Opportunity rollup fields on your Contact, Account, and Household records, updating the values for standard rollups as well as the values for soft credits.



(http://creativecommons.org/licenses/by-nc-sa/3.0/deed.en_US)

This work is licensed under a Creative Commons Attribution-NonCommercial-ShareAlike 3.0 Unported License (https://creativecommons.org/licenses/by-nc-sa/3.0/deed.en_US).
(/_ui/core/userprofile/UserProfilePage?u=005800000004REUDAA) | [Community Guidelines](#) | [Terms of Service](#) | [Logout](#)
(/_ui/core/userprofile/UserProfilePage?u=005800000004REUDAA) | [Community Guidelines](#) | [Terms of Service](#) | [Logout](#)
salesforce.com

