

NPSP: Work with Matching Gifts

We love matching gifts! They usually mean double the money for your organization. But to track them in Salesforce you'll need to do three important things (in this order):

- Identify and Track Matching Organizations
- Create the Matching-eligible Gift
- Create the Matching Gift from the Organization

! IMPORTANT : *If you're using a version of NPSP that was released prior to 3.63, you'll need to go through the matching gift setup (</articles/Resource/NPSP-Soft-Credit-and-Matching-Gift-Setup>) before proceeding.*

Identify and Track Matching Organizations

Start by tracking organizations that provide matching gifts (we'll show you how in a second), as that will make the process of selecting the correct Account a bit easier later on. You'll also want to track other information about the organization so that you'll know what to expect from particular organizations.

For example, here's a section from the Account record page for Orange Company—an organization that matches employee donations. To track Orange Company as a matching company, we simply check the **Matching Gift Company** option in the Matching Gift Information section of the Account record.

▼ Matching Gift Information			
Matching Gift Company	<input checked="" type="checkbox"/>	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			

We've also entered some other information—the company's matching gift percentage, the gift administrator contact information, deadline information, and so on. None of these fields are required for using matching gifts, but selecting **Matching Gift Company** at the very least makes identifying these companies much easier in list views and reports.

Create the Matching-eligible Gift

Now let's step through the process. Franklin Blue is an employee of Orange Company. He donates \$50 and tells you that his company will match. This is important, because accurately tracking a matching gift in Salesforce actually begins with the donor's gift—the gift that will be matched.

1. Enter Franklin Blue's gift like any other donation, however, in the Matching Gift section:
 - a. Indicate that the **Matching Gift Account** is Orange Company. (You can use the lookup field to find Orange Company in Salesforce.)
 - b. Mark the **Matching Gift Status** as **Potential** or **Submitted**. (You may need to review the Company's matching gift policies to see if there is additional work you need to do to solicit the gift.)

The screenshot shows the 'Opportunity Edit' form in Salesforce. The form is divided into several sections: 'Donation Information', 'Payment Information', and 'Matching Gift Information'. The 'Matching Gift Information' section is highlighted with a red border. It contains the following fields:

- Matching Gift Employer:** A text field with the value 'Franklin Blue- Donation'.
- Matching Gift Account:** A lookup field with the value 'Orange Company'.
- Matching Gift Status:** A dropdown menu with the value 'Potential'.
- Matching Gift:** A text field with the value '50'.

The 'Donation Information' section includes fields for Opportunity Name, Account Name, Primary Contact, Amount, Close Date, Lead Source, Type, Description, Private, Primary Campaign Source, Recurring Donation, Stage, Probability (%), Batch, Acknowledgment Status, and Acknowledgment Date.

2. **Save** Franklin Blue's new donation, just like any other record.

A side note . . .

Often, donations will come in from web forms that you might have integrated with your Salesforce organization. You'll want to keep track of those to make sure the information your donors enter matches your information in Salesforce.



For example, Lisa Smith also works for Orange Company and wants to have her donation matched. But she's submitted her \$25 donation through a web form, and the Matching Gift Employer text field contains the name she manually provided:

▼ Payment Information	
Number of Payments ⓘ 1	Payment Amount Received ⓘ \$25.00
Remaining Balance ⓘ \$0.00	Payment Writeoff Amount ⓘ \$0.00
Do Not Automatically Create Payment ⓘ <input type="checkbox"/>	

▼ Matching Gift Information	
Matching Gift Employer ⓘ Orange Co.	Matching Gift Status ⓘ Potential
Matching Gift Account ⓘ	Matching Gift ⓘ

You'll want to edit Lisa's Opportunity record to connect the correct **Matching Gift Account** (Orange Company) to her donation.

Matching Gift Information

Matching Gift Employer	<input type="text" value="Orange Co."/>	
Matching Gift Account	<input type="text" value="Orange Company"/>	 

Create the Matching Gift from the Organization

Weeks later, a check for \$75 arrives from Orange Company, indicating it's a matching gift for Franklin and Lisa's donations. (We're providing this use case because it's a very common one, but you could just as easily receive a matching check for a single donation.)

1. Navigate to the Orange Company Account record.
2. Click **New Account Donation** on the Opportunities related list to create a new Opportunity.
3. Select **Matching Gift** as the record type.
4. Complete the details in the gift as you typically would for an Organization donation. You are not entering any matching details quite yet.
5. **Save** the record.
6. On the new Opportunity record you just created, click the **Find Matched Gifts** button.

Opportunity Detail		Edit Delete Clone Email Acknowledgment Find Matched Gifts Manage Soft Credits	
▼ Donation Information			
Opportunity Name	Orange Company Matching Gift 2016-01-27 \$75		Private <input type="checkbox"/>
Account Name	Orange Company		Primary Campaign Source
Primary Contact ⓘ			Recurring Donation
Amount	\$75.00	Stage	Closed Won
Close Date	1/27/2016	Probability (%)	100%

The Nonprofit Success Pack lists any unmatched Closed/Won Opportunities that specify Orange Company as the **Matching Account**.

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

Find Matched Gifts

2 items

Save Cancel

Total Matching Gift \$75.00	Total Selected \$0.00	Total Unaccounted \$75.00
--------------------------------	--------------------------	------------------------------

SELECT	NAME	ACCOUNT	PRIMARY CONTACT	AMOUNT	CLOSE DATE
<input type="checkbox"/>	Franklin Blue 2016-01-27 \$50	Franklin Blue Family	Franklin Blue	\$50.00	1/27/2016
<input type="checkbox"/>	Lisa Smith 2016-01-27 \$25	Lisa Smith Family	Lisa Smith	\$25.00	1/27/2016

[Find More Gifts](#)

7. Select the Opportunities that should be matched to this donation, and make sure the total matches what you expect.

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

Find Matched Gifts

2 items

Total Matching Gift \$75.00	Total Selected \$75.00
--------------------------------	---------------------------

SELECT	NAME	ACCOUNT
<input checked="" type="checkbox"/>	Franklin Blue 2016-01-27 \$50	Franklin Blue Family
<input checked="" type="checkbox"/>	Lisa Smith 2016-01-27 \$25	Lisa Smith Family

[Find More Gifts](#)

NOTE: Salesforce calculates the Total Matching Gift amount automatically, based on the Matching Gift Percent field you've specified on the Account record. If you leave that field blank, Salesforce automatically uses the Opportunity amount instead. For example, if the Company matches at 200%, a donor would be credited \$100 for an original gift of \$50. You can adjust this amount later if you don't want to use the default value.

8. Click **Save**.

But what happens when . . .

. . . the donor doesn't indicate that their company will match their gift? You can still find those donations, and connect them to a company's matching gift.

Let's say that the Orange Company has sent you a \$75 check—a match for Franklin Blue's \$50 donation and Reginald Walters's (not Lisa Smith's) \$25 donation. Reginald, however, didn't mention that he worked for

Orange Company when he made the gift.

1. Select Franklin's gift, and then click **Find More Gifts**.

[OPPORTUNITIES](#) > [ORANGE COMPANY MATCHING GIFT 2016-01-27 \\$75](#)

Find Matched Gifts

2 items

Total Matching Gift	Total Selected
\$75.00	\$50.00

SELECT	NAME	ACCOUNT
<input checked="" type="checkbox"/>	Franklin Blue 2016-01-27 \$50	Franklin Blue Family
<input type="checkbox"/>	Lisa Smith 2016-01-27 \$25	Lisa Smith Family

[Find More Gifts](#)

2. In the Find More Gifts dialog box, enter as much as you know about the gift and click **Search**. (Enter search criteria that will return as few results as possible. Don't search for all gifts in 2014 to match against, for example.)

Find More Gifts

Fill in one or more filters, and then click on Search.

Account	Close Date Start
<input type="text"/>	<input type="text"/> [1/27/2016]
Primary Contact	Close Date End
<input type="text"/> Reginald Walters	<input type="text"/> [1/27/2016]
Amount	
<input type="text"/> 25	

[Cancel](#) [Search](#)

Salesforce adds potential Opportunities to the list so you can select the one(s) that apply.

Find Matched Gifts

3 items

Total Matching Gift
\$75.00

Total Selected
\$75.00

SELECT	NAME	ACCOUNT
<input checked="" type="checkbox"/>	Franklin Blue 2016-01-27 \$50	Franklin Blue Family
<input type="checkbox"/>	Lisa Smith 2016-01-27 \$25	Lisa Smith Family
<input checked="" type="checkbox"/>	Reginald Walters 2016-01-27 \$25	Reginald Walters Family

3. Select the matching gifts you're interested in (only two in this case) and then click **Save**.

Back on the company donation's related lists, you'll see some new information:

Contact Roles Now Contact Roles Help ?							
Action	Contact Name	Account Name	Email	Phone	Role	Primary	
Edit Del	Franklin Blue	Franklin Blue Family			Matched Donor	<input type="checkbox"/>	
Edit Del	Lisa Smith	Lisa Smith Family			Matched Donor	<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	Matched Donor	\$50.00	
Edit Del	Lisa Smith	Lisa Smith Family	Matched Donor	\$25.00	

Matched Gifts Matched Gifts Help ?						
Action	Opportunity Name	Primary Contact	Account Name	Amount	Close Date	Stage
Edit Del	Franklin Blue 2016-01-27 \$50	Franklin Blue	Franklin Blue Family	\$50.00	1/27/2016	Closed Won
Edit Del	Lisa Smith 2016-01-27 \$25	Lisa Smith	Lisa Smith Family	\$25.00	1/27/2016	Closed Won

1. **Contact Roles** are automatically created for the matched donors, with the Role that's specified for Matching Gift Donors in **NPSP Settings | Donations | Contact Roles**.
2. **Partial Soft Credits** are created for the amount of each donor's original gift. If the company did not match the entire amount of the original donation, you can edit the amount through the **Manage Soft Credits** button.
3. The individual original gifts are listed in the **Matched Gifts** related list.

Back on the original donor gift record, you can see that Salesforce has updated the **Matching Gift Status** to Received, and linked the **Matching Gift** field to the company's matching gift.

▼ Payment Information

Number of Payments ⓘ 1

Payment Amount Received ⓘ \$50.00

Remaining Balance ⓘ \$0.00

Payment Writeoff Amount ⓘ \$0.00

Do Not Automatically Create Payment ⓘ ☐

▼ Matching Gift Information

Matching Gift Employer

Matching Gift Account Orange Company

Matching Gift Status Received

Matching Gift Orange Company Matching Gift 2016-01-27 \$75

On the donor's Contact record, you can see that Franklin has received hard credit for his \$50 gift, and just \$50 soft credit for the \$75 matching gift!

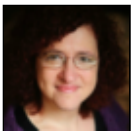
▼ Donation Totals

Total Gifts	\$50.00	Total Number of Gifts	1
Total Gifts Last N Days	\$50.00	Number of Gifts Last N Days	1
Total Gifts This Year	\$50.00	Number of Gifts This Year	1
Total Gifts Last Year	\$0.00	Number of Gifts Last Year	0
Total Gifts Two Years Ago	\$0.00	Number of Gifts Two Years Ago	0

▼ Soft Credit Totals

Soft Credit Total ⓘ	\$50.00	Number of Soft Credits	1
Soft Credit Last N Days ⓘ	\$50.00	Number of Soft Credits Last N Days	1
Soft Credit This Year ⓘ	\$50.00	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	\$50.00	Largest Soft Credit Date	1/27/2016
First Soft Credit Amount	\$50.00	First Soft Credit Date	1/27/2016
Last Soft Credit Amount	\$50.00	Last Soft Credit Date	1/27/2016

NOTE: Remember that you won't see soft credits reflected on the Contact record immediately. You either need to wait overnight for the calculations to happen automatically, or you can manually run a rollup batch update in **NPSP Settings | Donations | Rollup Donations Batch**.



(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).



(/)

brought to you by



salesforce.org
(<http://www.salesforce.org>)

Copyright ©2000-2016 Salesforce.org | [Community Guidelines](#) | [Terms of Service](#) | [Logout](#)