

NPSP: Create Tribute Opportunities (Honor and Memorial Donations)

Learn how to mark Opportunities in honor or in memoriam of someone.

This article contains these sections:

- Before you Begin
- Mark an Opportunity as Tribute
- Set up Automatic Opportunity Contact Roles

Before You Begin

This feature is available in Nonprofit Success Pack 3.61 and later. If you're using or have upgraded from a version of NPSP prior to 3.61, you'll likely need to follow these steps before you can use this feature.

1. Edit Opportunity page layout(s) to add a section and Honor/Memorial fields as shown below.

▼ Tribute Information	
Tribute Type ⓘ Honor	Notification Preference ⓘ Postal mail
Honoree Contact ⓘ Samwise Gamgee	Notification Recipient Contact ⓘ Frodo Baggins
Honoree Name ⓘ Samwise Gamgee	Notification Recipient Name ⓘ Frodo Baggins
Notification Recipient Information ⓘ	
Notification Message ⓘ Thanks for helping me save Middle Earth!	

(For more information, see Edit Page Layouts for Standard Objects (https://help.salesforce.com/HTViewHelpDoc?id=accessing_layout_standard.htm) in Salesforce Help & Training.)

2. Verify visibility (i.e. field access) of new Opportunity fields. (If you're not sure how to do this, see NPSP: Enable New Features (/articles/Resource/NPSP-Enable-New-Features).)
 - **Honoree Contact** - The existing Contact record of the honoree for this donation. This is a lookup field to the person being honored. It could be a deceased person for in memoriam donations.
 - **Honoree Name** - The honoree name as provided by the donor. If this field is left blank, and the Honoree Contact field contains a value, Salesforce automatically populates this field with that value.

The honoree is the person who is deceased if the Tribute type is Memorial, and is the honored person if the Tribute type is Honor.

- **Notification Message** - A personalized message for the notification recipient. The recipient could be the family member of a deceased person or the actual person being honored.
- **Notification Preference** - How the notification recipient should be notified.
- **Notification Recipient Contact** - The existing Contact record of the person to be notified for this donation. Generally should not be the deceased person but rather a living family member, or the person honored.
- **Notification Recipient Information** - The contact information (as provided by the donor) for the person who should be notified.
- **Notification Recipient Name** - The name (as provided by the donor) of the person who should be notified about this gift. If this field is left blank and the Notification Recipient Contact field contains a value, Salesforce automatically populates this field with that value.

3. Add Picklist values to Record Type.

- From Setup, enter **Opportunities** in the Quick Find box, then select **Record Type** under the Customize | Opportunities menu.
- Click on Record Type Label.
- Click **Edit** to the left of Notification Preference.
- Select all Available values and then the right arrow to transfer them to the Selected Values column. Do not select a Default value. Click **Save**.
- Repeat for **Tribute Type**.

Mark an Opportunity as Tribute

The Nonprofit Success Pack lets you capture tribute and notification recipient information in two ways:

- With lookup fields to tribute and notification contacts that already exist in Salesforce.
- With text fields for names and notification information for external data that comes from online donation forms (i.e., denormalized data).

If you're using contact information that already exists in Salesforce:

Simply fill in the Honoree Contact and Tribute Type fields as you're creating the new Opportunity (donation) record. Fill in the Notification Recipient fields for tribute-related notifications.

If you're using external information that came in from a web form:

Fill in the Honoree Name, Notification Recipient Name, and Notification Recipient Information fields. You can then search for an existing contact or create a new one to populate the Honoree Contact and Notification Recipient Contact fields. (This two-part process is necessary as a web form may populate the Honoree

Name as Bob Smith, while Salesforce might have a Contact record for Robert Smith.)

If your Opportunity record specifies an Honoree Contact, but has a blank Honoree Name field, Salesforce automatically populates the Honoree Name field with the Honoree Contact value when you save the record. Similarly, if your Opportunity record specifies a Notification Recipient Contact, but has a blank Notification Recipient Name field, Salesforce automatically populates the Notification Recipient Name field with the Notification Recipient Contact value when you save the record. Rest assured, Salesforce never overwrites anything—it only adds information to fields you leave blank.

Set up Automatic Opportunity Contact Roles

You can have the Nonprofit Success Pack automatically create contact roles when you fill in the Honoree Contact or Notification Contact fields.

1. From Setup, enter **Contact Roles** in the QuickFind box, then select **Contact Roles on Opportunities** under the Customize | Opportunities menu.
2. Click New and type **Honoree Contact** and **Notification Contact** on separate lines to create two new role values. Click **Save**.
3. Go to the NPSP Settings tab, click **Donations | Contact Roles**, and fill in the settings below. Leaving these settings blank disables automatic contact role creation for these fields.

HONOREE AND NOTIFICATION RECIPIENT OPPORTUNITY CONTACT ROLES

Create automatic Opportunity Contact Roles for Honoree and Notification Recipient contacts

Honoree Opportunity Contact Role

Honoree Contact

Populating this setting will auto-create a contact role for opportunities with an honoree contact. Leaving this field blank will disable automatic contact role creation for the honoree.

Notification Recipient Opp Contact Role

Notification Contact

Populating this setting will auto-create a contact role for opportunities with a notification recipient contact. Leaving this field blank will disable automatic contact role creation for the notification recipient.

For these roles to apply as soft credits, be sure to enable soft credit rollups and include the role values in the soft credit roles setting.

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

Decision Maker;Honoree Contact;Notification Contact

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



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