

NPSP: Create and Manage In-Kind Gifts

This article contains the following sections:

- Overview
- Setup—Before You Begin
- (Optional) Configure In-Kind Gift Settings
- Create In-Kind Gifts

Overview

An In-Kind Gift is a donation of goods or services, rather than a cash donation, to a nonprofit organization. Examples of In-Kind Gifts include computers, food, clothing, equipment or professional expertise. In Salesforce, In-Kind Gifts should be kept separate from cash donations, as the value of the gift is not reported in the same manner as cash contributions.

Setup—Before You Begin

The In-Kind Gift page layout, record type, and fields are available by default in trial versions created in NPSP 3.66 and later. If you started using the NPSP from a trial version after version 3.66, you can skip this entire section and move on to Create In-Kind Gifts.

If you started using NPSP prior to version 3.66, you'll need to do the following:

- Create In-Kind Opportunity Stages
- Create In-Kind Sales Process
- Create In-Kind Record Type
- Enable In-Kind Fields
- Configure Page Layouts
- Enable Opportunity Picklist Field for Record Types

- (Optional) Activate In-Kind Workflow Rule

Create In-Kind Opportunity Stages

The Opportunity Stages for an In-Kind Gift should be different than the Stages used for standard Donations.

To create a new Opportunity Stage:

1. From **Setup**, enter `Opportunities` in the Quick Find box, then select **Fields** under the Opportunities menu.
2. Click on the **Stage** field in the Standard Field section.
3. In the Opportunity Stages Picklist Values related list, click **New**. We recommend you add the following Stages for In-Kind Gifts, however you can name them whatever you'd like. If you already have these Stages configured, you don't need to recreate them.

Note: *Forecast Category is always set to Omitted since the declared value of In-Kind Donations should not be reflected in Forecast reporting.*

Stage Name	Type	Probability	Forecast Category
Cultivating	Open	10%	Omitted
In-Kind Not Yet Received	Open	50%	Omitted
In-Kind Received	Closed	100%	Omitted
Withdrawn	Closed	0%	Omitted

4. Click **Save**.

Create In-Kind Sales Process

Next, you'll need to create a Sales Process specific to In-Kind Gifts that uses the Stages you just created.

1. From **Setup**, enter `Sales Processes` in the Quick Find box, then select **Sales Processes** from the Opportunities menu.
2. Click **New**.
3. Give the Sales Process a name. We recommend: `In-Kind Gift`.
4. Click **Save**.
5. In the next screen, make sure only the Stages you defined in the above step are on the **Selected Values** side. Remove any others, then click **Save**.

Create In-Kind Record Type

Next, you'll need to create a Record Type specific to In-Kind Gifts that uses the Stages you just created.

1. From **Setup**, enter `Record Types` in the Quick Find box, then select **Record Types** from the Opportunities menu.
2. Click **New**. Give the Record Type a Label and Name. We recommend:
 - **Label:** In-Kind Gift
 - **Field Name:** `In_Kind_Gift`
3. Select the **In-Kind Gift** Sales Process you created in the steps above.
4. Check the **Active** box.
5. Next to each profile that can select this Record Type, check the **Enable for Profile** box.
6. Click **Next**.
7. Select **Apply one layout to all profiles**, then select the **In-Kind Gift Layout**.
8. Click **Save**.

Enable In-Kind 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.

Opportunity Object:

- Fair Market Value
- In-Kind Description
- In-Kind Donor Declared Value
- In-Kind Type

Configure Page Layouts

If you selected the In-Kind Gift Layout when you created the In-Kind Record Type, you can skip this step. Otherwise, assign the In-Kind Gift Page Layout to the In-Kind Gift Record Type in Opportunities Page Layout Assignment:

1. In **Setup**, enter `Page Layouts` in the Quick Find box, then click **Page Layouts** in the Opportunities menu.
2. Click **Page Layout Assignment**, then click **Edit Assignment**.
3. Select the rows in the In-Kind Gift Record Type column, select **In-Kind Gift Layout** from the drop-down, then click **Save**.

Opportunity

The table below shows the page layout assignments for different record type and profile combinations.

Edit Assignment			
Profiles	Record Types		
	Master	Grant	In-Kind Gift
Contract Manager	Donation Layout	Grant Layout	In-Kind Gift Layout
Custom: Marketing Profile	Donation Layout	Grant Layout	In-Kind Gift Layout
Custom: Sales Profile	Donation Layout	Grant Layout	In-Kind Gift Layout
Custom: Support Profile	Donation Layout	Grant Layout	In-Kind Gift Layout
Gold Partner User	Donation Layout	Grant Layout	In-Kind Gift Layout
Marketing User	Donation Layout	Grant Layout	In-Kind Gift Layout
Partner Community Login User	Donation Layout	Grant Layout	In-Kind Gift Layout
Partner Community User	Donation Layout	Grant Layout	In-Kind Gift Layout
Read Only	Donation Layout	Grant Layout	In-Kind Gift Layout
Solution Manager	Donation Layout	Grant Layout	In-Kind Gift Layout
Standard User	Donation Layout	Grant Layout	In-Kind Gift Layout
System Administrator	Donation Layout	Grant Layout	In-Kind Gift Layout
Edit Assignment			

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 to use them. This is because you need to specifically enable picklist fields for Record Types.

To enable picklists for a Record Type:

1. From **Setup**, enter *Record Type* in the Quick Find box, then select **Record Types** from the Opportunities menu.
2. Click on the **In-Kind Gift** Record Type.
3. Scroll to the **Picklists Available for Editing** section.
4. Click **Edit** to the left of **In-Kind Type**.
5. Add the **Goods** and **Services** fields to the **Selected Fields** side by clicking the right-facing arrow.
6. Click **Save**.

(Optional) Activate In-Kind Workflow Rule

We provide a Fair Market Value field on the In-Kind Gift Layout. You may want the Fair Market Value amount reflected as the "Amount" of the In-Kind Gift. This is useful if you want to see the Fair Market Value of an In-Kind Gift included in the automatic rollup statistics on the Contact or Account.

You can activate a workflow rule that automatically copies the Fair Market Value to the Amount field if the Amount field is left blank. Be sure that you haven't excluded the In-Kind Gift Record Type from Donation Rollups in NPSP Settings.

To activate this workflow rule:

1. From **Setup**, enter **Workflow Rules** in the Quick Find box, then select **Workflow Rules** from the Workflow & Approvals menu.
2. Click **Activate** next to the **Opportunity Copy FMV to Amount** workflow rule.

Opportunity Detail Edit Delete Clone Email Acknowledgment

▼ **Donation Information**

Opportunity Name	Terra Habib In-Kind Gift 2016-02-17
Account Name	Luna and Terra Habib Family
Primary Contact	Terra Habib
Amount	
Close Date	2/17/2016
Type	
Description	

▼ **In-Kind Information**

Fair Market Value	\$250.00
In-Kind Donor Declared Value	<input checked="" type="checkbox"/>
In-Kind Type	Goods
In-Kind Description	This nice desk!



(Optional) Configure In-Kind Gift Settings

There are some in-kind gift settings related to payments and rollups that you may want to configure.

Disable Payments for In-Kind Gifts

Since there is no payment of actual funds for an In-Kind Gift, we recommend enabling a setting that prevents the automatic creation of Payment records for In-Kind Gifts.

1. Click the **NPSP Settings** tab, then **Donations | Payments**.
2. Click **Edit**.
3. Select **In-Kind Gift** in the **Opp RecTypes Excluded for Payments** section.

4. Click **Save**.



Payments Enabled ☒ Enables automatic Payments created for new Opportunities/Donations.

Max Payments Set the maximum number of payments available in the Payment Creator

Opp RecTypes Excluded for Payments

- none -
- Grant
- In-Kind Gift**
- Matching Gift

In-Kind Gifts in Account and Contact Rollups

If you **don't** want In-Kind giving reflected in Contact and Account rollups:

1. Click the **NPSP Settings** tab, then **Donations | Donor Statistics**
2. Click **Edit**.
3. Select **In-Kind Gift** in the **Opp RecTypes Excluded for Account Rollup** and/or **Opp RecTypes Excluded for Contact Rollup** sections.
4. Click **Save**.

If you **do** want In-Kind giving reflected in Contact and Account rollups, make sure the Amount and Fair Market Value fields are populated on In-Kind opportunities. You can use the Workflow Rule described in the above section to automatically copy the Fair Market Value to the Amount field.

Create In-Kind Gifts

In-Kind Gifts are created just like any other donation. The only difference is that you select the **In-Kind Gift** record type so that you see the correct page layout.



Select a record type for the new opportunity. To skip this page in the future, change

Then populate these fields unique to In-Kind Gifts:

- In-Kind Information**

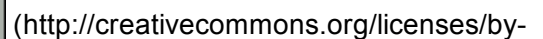
Fair Market Value 200

In-Kind Donor Declared Value ☒

In-Kind Type Goods

In-Kind Description

 - Clothing
 - Video Games



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