

NPSP 101

The complete guide to getting started with the Nonprofit Success Pack from Salesforce.

nonprofit
success
pack

Provided by  **Spekit**

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1. Account, Contact and Opportunity in NPSP

Last edited by [Elle Brayton](#) on Invalid date

Spek

Expert

NA Not Assigned

Definition

Everything in Salesforce revolves around the Account.

Looking from a sales-focused approach to Customer Relationship Management (CRM)— a salespeople would sell the product to individual **Customers (Contacts)** who work at a certain **Company (Account)** and influence the purchasing decision. The sales team believe they can sell 500 units of the product to the company (Account), this is known as **Opportunities**. These too, are connected to the account.

In nonprofit CRM, or Constituent Relationship Management, we care about managing constituent data and optimizing fundraising and program activities. We track a different set of entities and their relationships—namely, individual **Donors (Contact)**, their **Household affiliations (Account- whichever company/ entity they are associated to)**, and **Donations (Opportunity)**.

Here is a visual display to help understand the relationship between all three objects.

Each NPSP **Account** represents a **Household**. Each household can be associated with multiple **Donors (Contacts)** and **Donations (Opportunities)**.

Since nonprofits may need to track more than Donors, they can use Contacts to manage all kinds of peoples data, including members, volunteers, clients, board members, etc.

And they can use Opportunities to manage more than just Donations, such as grants, in-kind gifts, memberships, etc.

Here's a simple table to help understand what the salesforce objects represent in NPSP

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2. Assign Partial Soft Credits

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Spek

Expert

NA Not Assigned

Definition

Follow these steps to assign **Partial Soft Credits** to the appropriate contact roles.

A partial soft credit is a soft credit for an amount that is only a portion of the larger donation.

Example: A large organization like United Way collects donations on behalf of an organization's constituents, and typically shares them with nonprofits on a regular basis, such as monthly or quarterly. **The nonprofit creates a single Opportunity record for the larger check received but needs to soft credit each of its individual constituents.**

1. Navigate to an **Opportunity** record.
2. In the top right corner of the page, click  , then click **Manage Soft Credits**.
 - You should see all of the Contacts who have Contact Roles already assigned on this Opportunity.
 - You may also see no Contacts listed if no Contact Roles have been assigned.
3. Assign Partial Soft Credits by clicking the **Partial radio button** for the appropriate Contact, and entering the amount for their partial soft credit.

Note: *The Partial radio button MUST be selected to enter soft credit amounts. Selecting the Full radio button populates the Amount field with 100% of the Opportunity, and is not editable.*

4. You can add additional contacts by clicking the **Add another soft credit link** at the bottom of the list, browse to more Contacts, and assign them partial soft credits as well.

5. When finished, click **Save**.

You should expect to see the same soft credit listed in both the Contact Role and Partial Soft Credits related lists.

Every Partial Soft Credit record should have a corresponding Contact Role record, however, not every Contact Role record will have a corresponding Partial Soft Credit record.

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3. Create a Household

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NA Not Assigned

Definition

The following process will show you **how to create a Household** in the Household account model in NPSP.

Business Process

Whenever you create a contact record, Salesforce automatically creates a Household for you. So, you create a Household account simply by creating a contact in Salesforce.

By default, Salesforce uses a naming convention for the new Household that aligns with the name of the new Contact.

In the Contact Details section of your Contact record, it looks like this:

Note: The **Household** account model also supports organizational accounts, for example, other businesses, nonprofits, and religious organizations. You distinguish these from household accounts by setting a different record type.

While organizational accounts can contain direct contacts, it is recommended that you include all of your contacts as members of a Household account, and then associate them with the organization account through the Primary Affiliation option.

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4. Create an Account Soft Credit

Last edited by [Elle Brayton](#) on Invalid date

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Expert

NA Not Assigned

Definition

This process will show you the steps to create the **Account Soft Credit** record.

Business Process

Example: There are 3 contacts who work for ABC Corp. Each wants to donate \$100 to a local food pantry from their paycheck. ABC Corp. will match these donations.

CorpMatch sends a check to the local food pantry in the amount of \$600, which breaks down as:

- Employee #1 = \$100 PLUS ABC Corp = \$100
- Employee #2 = \$100 PLUS ABC Corp = \$100
- Employee #3 = \$100 PLUS ABC Corp = \$100

In order to make sure that ABC Corp. gets soft credit for the \$300 total match, we will create an **Account Soft Credit**.

1. Enter the Opportunity from CorpMatch in the amount of \$600.
2. On the Opportunity, go to the Account Soft Credits related list and click **New**.
3. Select the Account to soft credit. For our example, choose ABC Corp.
4. Enter the **Amount** of the soft credit. It can be a partial amount. Since ABC Corp. matched \$300 worth of donations, we will enter that amount.

5. Select the **Role**. Be sure to select a Role that is included in a filter rule applied to your Account Soft Credit rollup(s).

6. Click **Save**.

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5. Different types of Donations

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NA Not Assigned

Definition

In NPSP a donation is referred to by the word **Opportunity**. Anytime you come across an Opportunity in NPSP, it's referring to a donation or grant.

There are several types of **Opportunities** that Nonprofits receive which include:-

- **Individual Donation**
- **Household or Organization Donation**
- **Recurring Donation**
- **Soft Credit**
- **Opportunity Rollup**

You designate a type for an opportunity when you create it. You can also configure the list to add or remove types depending on your needs.

Below is an explanation of each type of Opportunity.

Business Process

1. Individual Donation: This is a gift from a single Contact, an individual.

2. Household or Organization Donation: This is a gift from an entire Household or Organization.

3. Recurring Donation: This is a donation that occurs more than once over a period of time. Recurring donations can be open-ended and continue in perpetuity, or they can be fixed-length donations (for example, monthly, yearly, and so on).

3. Soft Credit: This is a credit for a donation that someone did not actually make themselves, which credits that someone as an “influencer” of the donation, rather than as the direct donor. Soft credits can take many forms.

- A classic example is the employer donation matching scenario, where an employer sends a matching gift of \$100 to nonprofit A on behalf of employee B. A soft credit on employee B’s Contact record in Salesforce shows that they were responsible for the employer’s donation of \$100, but that the employee did not make the donation directly.

4. Opportunity Rollup: This is a field that contains accumulated totals over a period of time.

- Some examples include Total Number of Gifts, Total Household Gifts, Soft Credits This Year, and so on. You’ll see Opportunity Rollups in the Donation Information sections of the Salesforce Account and Contact objects, though they are not explicitly referred to as such.
- Total Gifts, for example, is a total of all the gifts over a period of time, “rolled up” into one.

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6. Grants

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NA Not Assigned

Definition

Grants are **non- repayable gift money or donations** that typically come from organizations. It is an excellent source of funding for non-profit organizations.

The grant is usually paid out separately from when it is awarded.

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7. How does V4S work

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Expert

NA Not Assigned

Definition

V4S or Volunteers for Salesforce uses some Salesforce standard Objects. These include:

1. **Contacts:** Represent individual volunteers.
2. **Campaigns:** Represent individual volunteer events or initiatives.

While it uses the above mentioned standard objects, it also introduces some custom objects into your salesforce org, such as:

1. **Volunteer jobs:** Track jobs to fill and skills needed
2. **Volunteer shifts:** Track dates, times, and the number of volunteers needed for a job
3. **Volunteer hours:** Track the hours a volunteer spends with your organization

Business Process

To help better understand how all these work together, here's an example with a visual display:

Volunteers sign up for either a job or a shift, for a particular event, depending on how you organize your volunteer structure.

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8. How to add a Contact to an existing Household

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NA Not Assigned

Definition

1. Select the Account Name of the Household you want to add the new contact to. For example Mcfadden Household in this case.

2. In the upper right-hand corner of the Account Detail page, click **Manage Household**.

3. Type the Contact's Name inside the Contact search box, then click **New Contact**.

Note: This contact can be referred to as a member of the household.

Enter the information for the new Contact, and then click **New Contact**. Now click **Save**.

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9. How to add a Donation from an Individual (Salesforce Lightning)

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NA Not Assigned

Definition

1. Open the Contact you want to associate with the new Donation.
2. Click **New Donation**.
3. Fill in the required fields and click **Save**.
4. Optionally you can click the Related tab on your Contact's record to see the Opportunities related list. You can then click the Opportunity name to view the new donation.

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10. How to add a Donation from an Organization (Salesforce Lightning)

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Expert

NA Not Assigned

Definition

Creating a donation from an Organization is almost identical to creating a donation from an individual.

Business Process

1. Open the Organization Account you want to associate with the new donation.
2. On the Organization Account record, click the **Related** tab.
3. On the Opportunities list, click **New**.

4. Select the Donation record type and click **Next**.

5. Fill in the required fields and click **Save**. You can click on the Opportunity Name in the Opportunities related list if you want to see the full donation record.

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11. How to change a Household's Address (Salesforce Lightning)

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Expert

NA Not Assigned

Definition

Nearly every nonprofit needs to manage information about their donors and where they live, since it is essential that your most faithful donors receive your mailings.

Business Process

1. Click the **Accounts** tab in NPSP.
2. Select the name of the Household Account you want to change.
3. Click **Manage Household**.

4. Under Household Address, click **Change Address**.

5. Click **Enter a new address** and enter the McFadden Household's new address. Click **Set Address** when you're finished.

6. Click **Save** on the Manage Household page to ensure your address changes.

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12. How to create a Grants Opportunity

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NA Not Assigned

Definition

1. In the navigation bar, click Accounts.
2. Find the Account with which you want to associate the Grant. If you haven't yet created an Account for the organization, create a New one.
3. On the Opportunities related list, click New.
4. From the list of Record Types, select Grant and click Next.

5. Salesforce fills in the Opportunity Name and Account Name by default.

6. Fill in all the relevant information and click Save. The new Grant Opportunity is now associated with the Account.

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13. How to create a new Volunteer Campaign

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Expert

NA Not Assigned

Definition

NPSP comes along with a volunteer management application- Volunteers for Salesforce (V4S).

Volunteer Campaign is an object in this application that comes with many custom fields specified to manage volunteers. You may create a Campaign in Salesforce and that would work for your org, but you won't have access to those custom Fields available in the Volunteer Campaign such as Number of hours, Volunteer jobs, etc.

Business Process

1. In Salesforce, click the **App Launcher** in the navigation bar.

2. Choose the **Volunteers** app. (This will only appear if you have the NPSP)

3. Select the **Volunteer Campaign** as the record type and click **Next**.

4. Enter the Volunteer Campaign Name and any other information you need. Be sure to select the **Active** option. If you don't select this option, the campaign doesn't display on the Shift Calendar or on your website. Now click **Save**.

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14. How to create a Recurring Donation (Salesforce Lightning)

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Expert

NA Not Assigned

Definition

1. In the Nonprofit Success Pack, click the Recurring Donations tab.

2. Click **New**.

3. Fill in any details available. Enter EITHER the Contact name or the Organization name, but not both. Click **Save**.

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Default value

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15. How to create Affiliations in NPSP

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NA Not Assigned

Definition

An **Affiliation** is actually an independent, custom Salesforce object that links **Contacts** with **Organizations**. Affiliations can represent current or past connections between your Contacts and Organizations.

Business Process

1. Navigate to the Contact or Organization Account where you would like to add the Affiliation.
2. Click the **Related** tab and click **New** in the Organization Affiliations related list. This creates a new Affiliation record that lets you link a Contact to an Organization.
3. Populate the Organization and Contact fields, as well as any other information you have for the Affiliation.

4. Optionally, you can check the **Primary** box if you want this Organization to appear in the Primary Affiliation field on the Contact's record.

5. Click **Save**.

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16. How to create an Organization Account

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NA Not Assigned

Definition

Nonprofits interact with entities other than Contacts and Households, namely Organizations (like other nonprofits).

Organization Accounts allow your nonprofit to keep track of entities that are not individual constituents (Contacts) or Households. These entities might be foundations that fund your work, other nonprofits that you partner with, corporations that sponsor your work, or companies that employ your donors.

Organization Accounts can help you better track the companies and foundations that you interact with.

Business Process

1. In the Nonprofit Success Pack, navigate to the Accounts tab and click **New**.
2. Select Organization from the Record Type picklist and click **Next**.

3. Enter the Organization Name and other details. Click **Save**.

Metadata

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17. How to create Deliverables record (Salesforce Lightning)

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NA Not Assigned

Definition

As your Grant moves along in its process from Prospecting to Awarded, you'll want to keep key data on the Grant record up to date. You keep track of these deadlines by creating separate Deliverable records.

Business Process

1. Open a Grant record that's been set to Prospecting.
2. In the Deliverables related list, click **New**.

3. Give the deliverable a Name and add additional detail. Be sure to indicate the **Due Date**. Now click Save.

4. You can enter additional Deliverable records. You can enter as many as is appropriate.

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Default value

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18. How to create Volunteer Jobs

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Spek

Expert

NA Not Assigned

Definition

1. Click on **Campaigns** and select the **Volunteer Campaign** you want to add the Volunteer Jobs too. Click the **Related tab** and then click **New** in the Volunteer Jobs related list.

2. Enter the Name of the Job. Select Display on Website for website integration. Fill in all the information and click **Save**.

Metadata

Default value

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19. How to log in to Salesforce NPSP

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Spek

Expert

NA Not Assigned

Definition

The process below will cover both how to login to NPSP in the Lightning edition as well as the Classic edition.

Business Process

1. Type www.salesforce.com in the adress bar of the web brower you are using.

2. Click on Login at the top right of the page

3. Enter your email/ username and password and click on login.

- If the NPSP isn't already launched, click on the Launch button in Salesforce Lightning on the top left corner.

- If you are on the Salesforce classic edition, click on the Sales button in the top right and select App Launcher from the drop down menu.

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20. LOI

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Expert

NA Not Assigned

Definition

LOI is an acronym for Letter Of Intent.

It is a document outlining one or more agreements between two or more parties, before the agreements are finalized.

The decision of whether or not you are going to apply for the Grant is based on whether or not the LOI (Letter Of Intent) is approved.

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21. NPSP

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Expert

NA Not Assigned

Definition

NPSP- NonProfit Success Package a version of Salesforce that allows you to bring constituent and program data together in one place, so you can get a complete view of your organization's impact. It is a set of managed packages tailored for nonprofits that allows them to better manage some common nonprofit business processes.

With NPSP, you not only get the functionality built specifically for nonprofits, you also get a fully functioning Salesforce organization.

Business Process

NPSP display's the Objects (such as Account) in Salesforce in a spreadsheet format (rows and columns), as shown below.

Think of each row in a spreadsheet as a **record** in an object, representing a single entity, a person, or a donation.

The columns in a spreadsheet are like **fields** within an object, representing one detail about a record, such as a name, an amount, a date and so on.

Metadata

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22. NPSP Health Check tool

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Spek

Expert

NA Not Assigned

Definition

The **NPSP Health Check tool** is not a technical assistance or training tool, but it's a valuable, free service that helps busy Salesforce admins with housekeeping. Health Check runs a **checkup** and warns you about any settings that seem out of sync or data that may be incomplete.

If anything seems off, Health Check gives you tips for resolving each warning. For example, it might tell you to look at a preconfigured report to identify incomplete records.

Think of Health Check as an assistant who helps you inspect around the house for needed maintenance. Run it regularly to keep the cobwebs out of your system.

Business Process

1. Go to the App Launcher and click **NPSP Settings**.
2. Under System Tools, click **Health Check**.
3. Click **Run Health Check**.

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23. Types of Recurring Donations

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Spek

Expert

NA Not Assigned

Definition

There are 2 types of **Recurring Donations**:

1. Open-Ended Recurring Donations are single donation amounts given over and over again, with no ending date defined.

- Example: John Smith gives your organization \$100/month through his workplace giving campaign, and has not specified an end date for the donation. The donation will continue until you close the Recurring Donation.

2. Fixed-Length Recurring Donations are single donation amounts given over and over again, but for a defined period of time.

- Example: John Smith has pledged to give \$50 a month for 3 years. Thus, the donation continues for three years and ends at that point.

Metadata

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24. V4S

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Spek

Expert

NA Not Assigned

Definition

Volunteers are the lifeblood of many nonprofit organizations. **Volunteers for Salesforce (V4S)** is an application for volunteer management which comes for free along with the Nonprofit Success Pack (NPSP).

V4S handles many common volunteer management processes such as managing the volunteer jobs that an organization needs filled, tracking the hours a volunteer works, displaying a calendar of jobs and shifts on an organization's website and so on.

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25. What is a Household in NPSP

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Spek

Expert

NA Not Assigned

Definition

Households allow individual contacts to be grouped as a single entity within the **Household** account model.

***Note:** The **Household** account model is the preferred account model for NPSP 3.0 and later versions.*

Business Process

Salesforce was originally designed as a "**Business-to-Business**" (B2B) application in which every company keeps track of their **accounts**. Each account has people associated with it, or **contacts**, as well as deals, or **opportunities**.

Due to the challenges nonprofits face trying to fit into this model, Salesforce has adopted an account model aligned with how nonprofits approach their donors and donations, the Household account model.

The **Household** model aligns with the B2B model as:

- Account = **Household**
- Contact = Donor
- Opportunity = Donation

In the Household Account model, the standard Salesforce Account object acts as the household, with numerous contacts (donors) and opportunities (donations) associated with it.

The Household Account model is the default account model for Nonprofit Success Pack, and is the account model that [Salesforce.org](https://www.salesforce.org) strongly recommends.

A visual example of the Household Account model:

The Household account model supports many features, including Contact management for multiple Household members, and address management for things like seasonal addresses.

Also, the Household account model allows for cleaner relationships between objects in Salesforce's relational databases.

- Example: Donations can relate to both a Household and a Contact without having to "go out" to other objects.

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2020-02-10

26. What is a Soft Credit

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Spek

Expert

NA Not Assigned

Definition

A **soft credit** is a credit for a donation that a contact or donor did not actually make, but may have somehow influenced.

Business Process

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, which was the actual money that came from Jane.
- The matched \$100 can be tracked as a **“soft” credit** because Jane influenced, but did not literally donate, the money.

Soft Credits are tracked on the contact record. There are many that come out-of-box with the NPSP, and they look like this image:

The value of **Soft Credits** is great; they give you a more complete picture of your donors and the activity they might be helping to generate for your organization.

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27. What is Opportunity Rollups

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NA Not Assigned

Definition

Opportunity Rollups display information from other related records, including aggregate totals. In other words, rollup fields allow information from one record to automatically “roll-up” and appear on another related record.

For example, the Total Gifts field on a Household Account displays the total value of all the donations from that Household- it's the total value from across all the associated Opportunity records “rolled up” into one.

Heres a Visual display to help better understand Opportunity Rollups:

In the Nonprofit Success Pack, Account and Contact records include several rollup fields that display totals based on their related Opportunities:

- Membership Information
- Total Gifts
- Soft Credits
- Household Donations
- Donation Statistics

Metadata

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