

Salesforce for Nonprofits Base Camp: Entering Donations and Tracking Grants

Hands-On Workshop Guide

Agenda

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Agenda

Each Base Camp session includes a hands-on exercise. Today's focus is on opportunity management.

Together we will:

- Create a donation from an individual.
- Allocate funds for that donation to a scholarship fund.
- Create a new opportunity for a potential grant from a foundation.
- Add a deliverable to track application and reporting deadlines.
- Track the grant through the grant application lifecycle.
- Create a payment schedule for the grant.

Generate Your Workshop Org

The first thing you need to do is spin up a practice environment.

1. Navigate to <https://sforce.co/BaseCampWorkshop>
2. Wait for the deployer to run. It will take about 10 minutes to generate your org.
3. When the org is ready, click **Launch**. You can safely ignore the error message.

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 Salesforce DX Public Deployer

Deploying sfdo-csg-nonprofit-16428761113258c 100% Complete

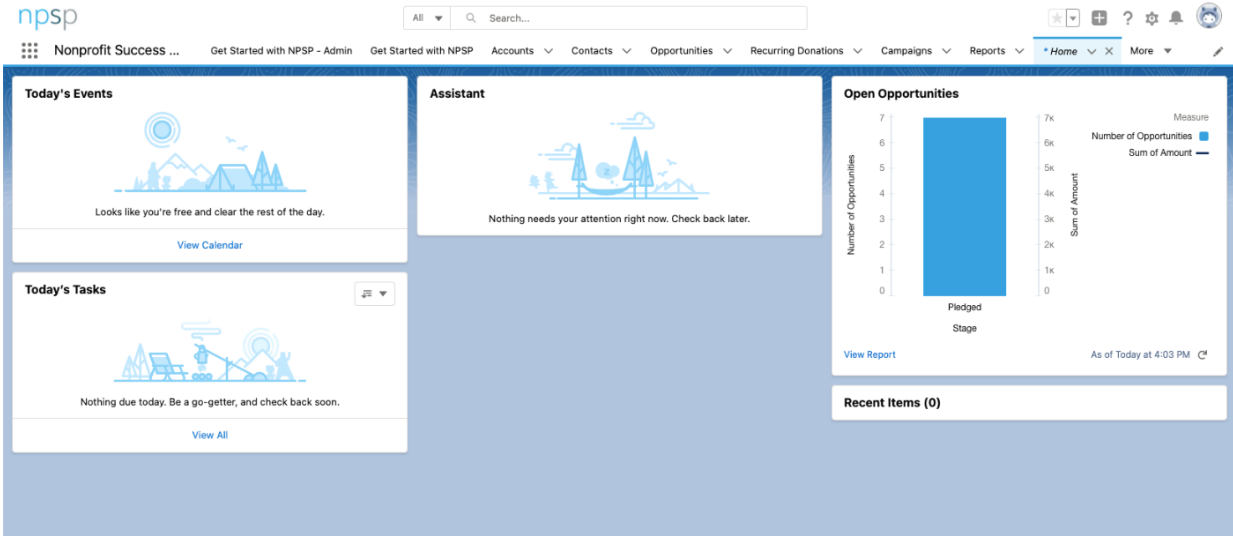
An error occurred while deploying. See the browser console logs for more information.
A scratch org was created with username test-9eufuenm9odz@example.com, but the settings failed to deploy

Note: It can take up to 5 minutes for the DNS to propagate. If the scratch org doesn't load properly, wait a few minutes to launch.
Your org is ready! Delete Launch

Note: Use the Launch button above to login for the first time
The credentials are for other uses (mobile app, integrations).
They auth to a sandbox (test.salesforce.com) not production (login.salesforce.com)
These credentials/button will continue working after the session-based Launch button stops.
Your username is and your password is |whg6ubbTnsxd Launch via credentials

Log In to Your Workshop Org

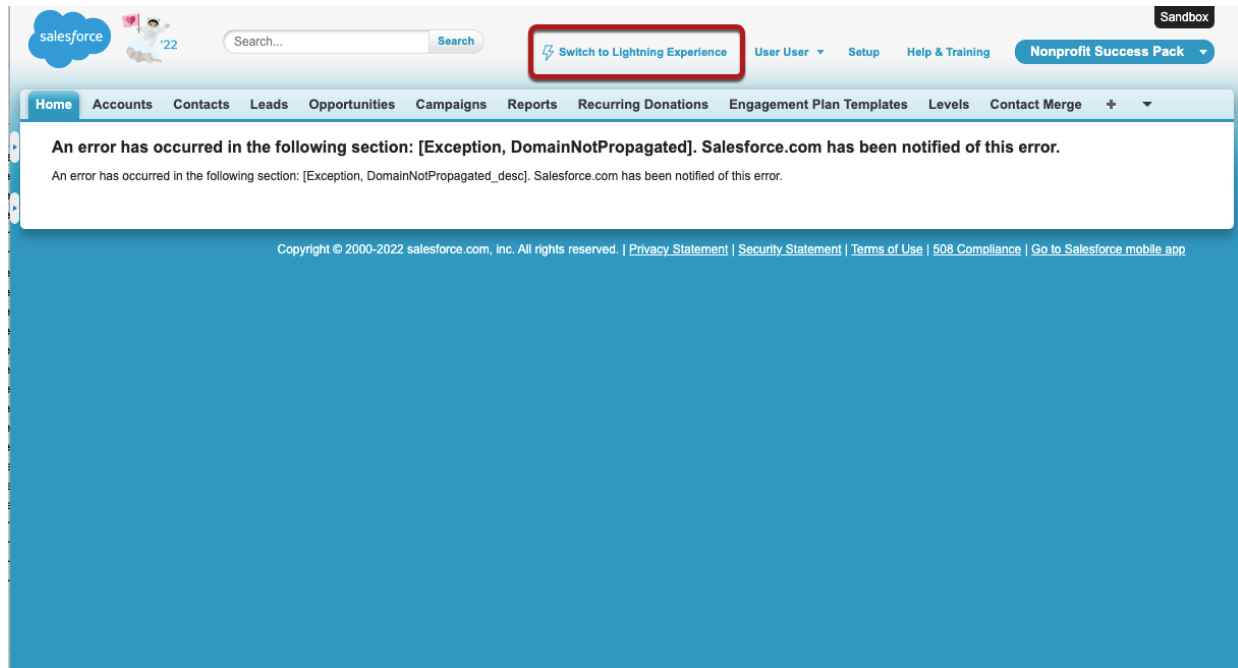
When you launch your workshop, you will begin on a homepage that includes Today's Events and Today's Tasks. Since this is a brand new org, you won't see any tasks assigned to you.



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What if My Screen Doesn't Look Like That?

If you receive an error upon logging in—such as in the screenshot below—click **Switch to Lightning Experience** at the top of the page.



Before We Begin

In today's workshop, we'll walk through step-by-step instructions to create and track a donation from an individual donor and a grant from a foundation. For these examples, we use NPSP out-of-the-box without any customizations. We've included *Think Like an Admin Tips* to point out where you might want to customize Salesforce for your own nonprofit. We provide how-to resources at the end of this guide for those who want to learn more.

Let's get started!

Salesforce Opportunity Definition of Terms

- **Opportunity Record Type** - how we categorize different types of revenue in NPSP. NPSP includes Opportunity record types for donations, grants, major gifts, in-kind gifts, matching funds and memberships and you can add your own for other types of revenue such as registration fees or events
- **Close Date** - Close Date is the date you expect this opportunity to be booked. This is most often the date your accountant realizes this income – so if you're on Accrual-based accounting, this should be the date the revenue will be committed or booked. You can also track Payments separately which is handy when a particular Opportunity is paid out in multiple installments.
- **Amount** - This is straightforward. This is the total amount of this Opportunity. NPSP has includes a Requested Amount field which is handy for when you are ultimately granted a different amount than you requested.
- **Stage** - the stage field tracks all the different steps that you take to secure an Opportunity, and usually has clear criteria to move to the next stage. For example, a Grant Opportunity moves from the Research stage to the Letter of Intent

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stage when you submit the Letter of Intent to the foundation or grantmaker.

- **Probability** - this is the likelihood that you'll ultimately receive funds when an Opportunity is in this particular stage expressed as a percentage. So following our grant example, we only have a very small likelihood of getting any particular grant when we are researching potential new grants online or through word of mouth. By the time we are invited to submit a full proposal, the likelihood of getting the grant is much higher. The exact probability will depend on the kind of work your organization does, the types of grants you are applying for, and your organization's track record. The Probability field is also used to populate the Expected Revenue field which can help you predict future income.
- **Primary Campaign** - helps you track the source of incoming Opportunities, say an Annual Campaign or Auction.

Create a Donation From an Individual Donor

In the slides, we discussed how different roles in your nonprofit may need to keep track of different things in Salesforce. Remember that some types of income have longer processes than others—for example, a grant has a much longer lifecycle than a small donation.

We're first going to get hands-on with a small donation from an individual. A small donation typically doesn't involve a complicated process—you send a direct appeal and donations come back. All you need to do is enter the gift.

The first thing we'll do is create a simple donation record for a gift. Small checks and credit card donations are the lifeblood of many nonprofits, so you and your staff may have to enter a lot of them. Luckily, NPSP makes it pretty simple.

We're going to enter a \$100 check we received in the mail from Anna Black in response to our Annual Campaign appeal.

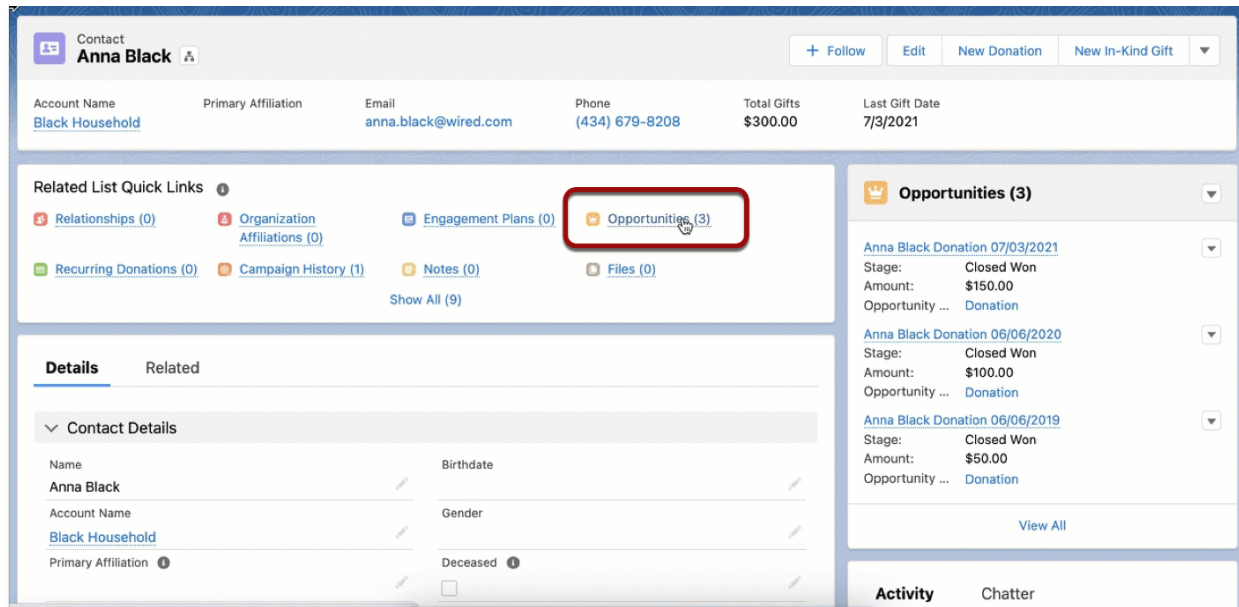
1. Type **Anna Black** into the Global Search bar at the top of your screen. As you type, her contact record appears next to a purple icon.
2. Click **Anna Black's** contact record.

Hint: We cover Contacts and Accounts in a lot more detail in the "[Begin with Contacts and Accounts](#)" Base Camp session

The screenshot shows the Salesforce interface. At the top, there's a search bar with 'Anna' entered. Below the search bar, a dropdown menu shows search results. The first result, 'Anna Black', is highlighted with a red box. Below the search bar, the 'Contact' record for 'Anna Black' is displayed. The record shows the account name 'Black Household', primary affiliation, email 'anna.black@wired.com', phone '(434) 679-8208', and a total of '\$300.00'. Below the contact record, there's a 'Related List Quick Links' section with links to 'Relationships (0)', 'Organization Affiliations (0)', 'Engagement Plans (0)', 'Opportunities (3)', 'Recurring Donations (0)', 'Campaign History (1)', 'Notes (0)', and 'Files (0)'. A 'Show All (9)' link is also present.

The Total Gifts field in the Highlights panel shows us that Anna has given us a total of \$300 in the past. If you click **Opportunities** in Related List Quick Links you can find the details of her three separate donations ranging from \$50 to \$150.

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CREATE A DONATION WITH A QUICK ACTION

Now let's enter Anna's new \$100 donation.

1. Click the **New Donation** action at the top right of your Anna's contact record and enter these details:
 - a. Close Date: The Close Date is generally the date when you receive funds or when you expect to receive funds in the future. When you use the "New Donation" Quick Action, this field is pre-filled with today's date, but you can change it if you need to. But, since, in our scenario, we've just received a check, we'll leave it as is.
 - b. Stage: An Opportunities Stage tracks all the different steps that you take to secure that opportunity. Since small donations are generally entered when you already have the money in hand, this field is pre-filled as Closed Won, but you can change this, too. Click on the picklist to see the other Stage options available for this record type: Pledged, Declined, and Closed Lost. These options can be adjusted if you use other terms or stages. We'll leave the Stage as **Closed Won**, to reflect that we successfully received the donation

Think Like an Admin Tip: You can customize the stages to match your nonprofit's preferred terms, such as if you prefer Posted rather than Closed Won.

- c. Amount: is the amount of the donation. So, enter **\$100.00**
 - d. Primary Campaign Source is used to attach a donation to a fundraising campaign so that you can track the success of different outreach efforts such as an annual campaign or a fundraising event. Find and select **Annual Campaign** by starting to type it in the field then clicking it.
2. Click **Save**.

Now we're back on the contact record for Anna Black. Let's take a look at the donation we just created.

1. Click the **Related** tab underneath the Related List Quick Links section.
2. Scroll down until you see the Opportunities related list. This list will show Anna's donations, including the one we just created.

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The screenshot shows a Salesforce contact record for Anna Black. The header includes the contact name and a '+ F' button. Below the header is a table with fields: Account Name (Black Household), Primary Affiliation, Email (anna.black@wired.com), Phone ((434) 679-8208), and Total Gifts (\$300.00). Below the table is a 'Related List Quick Links' section with icons and links for Relationships (0), Organization Affiliations (0), Engagement Plans (0), Opportunities (4), Recurring Donations (0), Campaign History (2), Notes (0), and Files (0). A 'Show All (9)' link is also present. Below the quick links is a tabbed interface with 'Details' and 'Related' tabs. The 'Related' tab is selected and highlighted with a red box. Under the 'Related' tab, there is a 'Twitter' section with a dropdown arrow, a link to 'Learn More Using Twitter', and a 'Sign in with Twitter' button.

Open the donation by clicking on the **Donation Name** with Close Date of today and Amount of \$100.00.

Scroll down to the Details tab to see information about this donation, including Account Name (Black Household), Amount (\$100), Close Date (today), and the Primary Campaign Source (Annual Campaign).

View the Automatically Created Records

When a donation is entered, NPSP automatically creates a Payment record, Contact Roles, and **can** create General Accounting Unit (GAU) Allocations to designate donations (or portions of a donation) to specific funding purposes, if set up to do so.

PAYMENTS

Every time Carla enters an Opportunity record, Salesforce for Nonprofits automatically attaches a Payment record. At first, an Opportunity and a Payment sound like the same thing. So, why do they have 2 records?

The main reason is that some donations (especially large ones) may require multiple payments, and by separating the Payment record from the Opportunity, Brandon can easily see any donations with an unpaid balance, or see any upcoming or overdue payments that either he or Carla need to follow-up with.

For most small gifts, the Opportunity and the Payment are closely connected - so that's why it happens automatically. You don't need to remember to create separate payment records.

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Opportunity: Anna Black Donation 08/05/2021 Annual Campaign - Email

Primary Contact: Anna Black | Close Date: 8/5/2021 | Amount: \$150.00 | Primary Campaign Source: Annual Campaign - Email

Stage: Closed Won

Related List Quick Links: Contact Roles (2), Partial Soft Credits (0), Payments (1), GAU Allocations (1), Notes (0), Files (0), Opportunity Field History (2)

Details | Related

Contact Roles (2)

Contact	Role	Title
Anna Black	Donor	
James Black	Household Member	

Payments (1)

Payment Number	Payment Amount	Payment Status	Payment Date
PMT-00154	\$150.00	Paid	8/5/2021

GAU Allocations (1)

Contact Roles (2)

Anna Black (PRIMARY) | Role: Donor | Title: | View All

James Black | Role: Household Member | Title: | View All

Activity | Chatter

Log a Call | Email | New Task

Recap your call... | Add

Filters: All time • All activities • All types | Refresh • Expand All • View All

Upcoming & Overdue

No activities to show. Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

OPPORTUNITY CONTACT ROLES

On the Contact Roles component on the right side of the opportunity record, notice that NPSP has automatically created a contact role of Donor for Anna Black because she is the individual responsible for this gift.

Contact roles establish a connection between a contact and an opportunity. Notice that NPSP has also automatically created a contact role of Household Member for Anna's husband, James Black. In addition, we could manually add additional contact roles if we wanted to—for a solicitor, influencer, or others who had some part in the gift coming to your organization

Opportunity: Anna Black Donation 03/31/2022

Primary Contact: Anna Black | Close Date: 3/31/2022 | Amount: \$100.00 | Primary Campaign Source: Annual Campaign

Stage: Closed Won

Related List Quick Links: Contact Roles (2), Partial Soft Credits (0), Payments (1), GAU Allocations (1), Notes (0), Files (0), Opportunity Field History (3)

Details | Related

Donation Information

Opportunity Name	Anna Black Donation 03/31/2022	Opportunity Record Type	Donation
Account Name	Black Household	Primary Campaign Source	Annual Campaign
Primary Contact	Anna Black	Acknowledgment Status	To Be Acknowledged
Close Date	3/31/2022	Acknowledgment Date	
Stage	Closed Won	Gift Strategy	

Contact Roles (2)

Anna Black (PRIMARY) | Role: Donor | Title: | View All

James Black | Role: Household Member | Title: | View All

Activity | Chatter

Log a Call | Email | New Task

Recap your call... | Add

Filters: All time • All activities • All types

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Contact roles help you quickly understand what role someone plays in an individual opportunity. NPSP also uses this information to roll up donation summary statistics on contact and account records. Let's check out how this works.

Click **Anna Black**'s name in the Contact Role component to go back to Anna's contact record.

1. Notice that Total Gifts now displays \$400 in the Highlights Panel. NPSP calculates this value using the opportunity contact role from Anna's four gifts.
2. Scroll down the page to view details about Anna's Donation Information, Donation Totals, Soft Credit Totals, and Household Donation Info. These rollup fields are calculated by Salesforce for Nonprofits based on Anna's Contact Role.
 - a. **Donation Totals** (Hard Credits) tabulates all gifts entered with Anna as the *Donor*.
 - b. **Soft Credit Totals** tabulates all gifts entered with Anna as an *Influencer, Decision Maker, Solicitor, Honoree, Matched Donor, Grant Manager, Household Member, Workplace Giving, etc.*
 - c. **Household Donation** Info tabulates all gifts for Anna's entire Household Account.

By entering each gift in Salesforce, no matter how large or small, you can get a complete picture of your donors' giving in NPSP.

GAU ALLOCATIONS

General Account Units (GAUs) and GAU Allocations are a way to track what funding "buckets" a donation should go into. You can allocate the entire amount of a donation in a single fund, or it can be split within multiple buckets

In order to use GAUs and GAU Allocations, you must first create General Accounting Unit records to match your organization's fund structure. You can set default GAU Allocations on Opportunities, Recurring Donations or Campaigns. The Resource Guide contains more details on configuring GAU Allocations

1. On the **Related** tab, scroll down to the **GAU Allocations** Related List.
2. Notice that NPSP has automatically created an allocation to the **Unrestricted** fund.

If a donor indicated that they wanted to apply their donation to a different fund, such as the Scholarship fund or a Capital Campaign, or even split a donation among two or more funds, we could click the **Manage Allocations button to allocate these funds.**

Create an Opportunity from an Organization

We can also create an opportunity from an organization such as a business or foundation.

In today's example, we'll create a grant from the Save the World Foundation and track that grant through the application and payment lifecycle. A grant typically has a much longer process than a small donation from an individual—maybe even a year or more—and we want to track all the steps in a single place.

CREATE A NEW GRANT OPPORTUNITY

Let's create a new opportunity for a potential grant from Save the World Foundation.

1. Type the first few letters of **Save the World Foundation** into the Global Search bar at the very top of your screen. As you type, the account record appears next to a purple icon.
2. Click the **Save the World Foundation** account record.

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3. Notice there is a New Grant action in the Quick Actions menu, and normally we would use that button. For this exercise, though, we'll take a longer route to show you another way. Click on the **Related** tab underneath the Related List Quick Links section.
4. Scroll down until you see the Opportunities related list. Click **New** on that list.
5. Notice we can choose from any of the six record types that come with NPSP. Select **Grant**.

Think Like an Admin Tip: You can add record types to track additional revenue types such as program revenue or event income if you need to.

6. Click **Next**.

7. Enter these details:

- a. Donation Name: **Save the World Grant 06/30/2023**
- b. Close Date: **06/30/2023**. This is the date in the future when hope to receive the funds if our grant application is successful.
- c. Stage: **Prospecting**. Grants tend to have a very long lifecycle—sometimes months or even years. We're creating this opportunity at the very early stage of Prospecting to indicate that we're just researching the feasibility of applying for this grant. We have a very low probability of ultimately receiving this grant right now.

As we move further along in the application process, we'll update the Stage field to show our progress.

Think Like an Admin Tip: You can add, remove, or change the names of grant stages to match your organization's grant-seeking process.

- d. Amount: **10,000.00**. In this case, this isn't the Closed Won amount, but the amount we ultimately hope to receive.
- e. Probability: This field is pre-filled. Notice that the probability is low—only 10%—because it's unlikely that we'll get most of the grants we learn about and research. This probability will increase as we progress through the stages.

Think Like an Admin Tip: You can adjust the probability for a stage manually on a particular record or globally for all opportunities with that stage.

8. Click **Save**.

Let's check out this grant. Starting from the Account record:

1. Click **Opportunities** in the Related List Quick Links component
2. Click on the **Save the World Foundation \$10,000 Grant 06/30/2022** donation name.

Think Like an Admin Tip: You can create your own opportunity name formula in NPSP Settings.

TRACK GRANT DEADLINES WITH DELIVERABLES

We've created our first grant. Now we're ready to start working on it.

Let's say we've researched this grant and found that we meet the eligibility requirements. We've decided to signal our interest to the Save the World Foundation by submitting a letter of intent (LOI). We check out the foundation's website and realize that the LOI is due soon.

We'll take advantage of deliverables to create a schedule of application and reporting materials.

1. Click the **Related** tab underneath the Related List Quick Links section.

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2. Scroll down to the Deliverables related list and click **New**.
3. For Deliverable Name enter **Letter of Intent**.
4. For Type select **LOI**.
5. For Due Date enter 1 month from today's date
6. Leave Close Date blank. You'll fill that in with the date you complete the Deliverable.
7. For Requirements enter **Submit Letter of Intent per funder guidelines**.
8. Click **Save & New**.
9. For **Deliverable Name** enter **Grant Application Submission**.
10. For Type select **Application**.
11. For Due Date enter 3 months from today's date
12. Leave Close Date blank. You'll fill that in with the date you complete the Deliverable.
13. For Requirements enter **Submit grant application as per funder guidelines**.
14. Click **Save**.

Follow these steps for adding any other grant submission or reporting deadlines to your calendar and keep track of the deadlines all in one convenient place.

Now scroll to the top of the grant opportunity record and notice that the Next Deliverable Date field on the Highlight panel has been populated with the LOI due date. When you enter a close date for this deliverable, NPSP will automatically update the Next Deliverable Date with the due date for your next deliverable, which is the due date for the grant application submission.

CREATE AN ACTIVITY

After we submit our grant application, we have a conversation with Save the World's grant officer, Morgan Jones. One of the benefits of NPSP is being able to track all your fundraising interactions in one place. Let's log a call to create a quick record of this interaction so that everyone working on the grant will be aware of our discussion.

1. In the Activity Panel beneath Log a Call, click on **Recap your call....** box.
2. For Subject, type **Grant decision timeline**.
3. For Comments, type **Grant officer Morgan Jones says that we should hear back on grant next week.**
4. For Name, find and select **Morgan Jones** so we can associate this grant with his record.
5. Click **Save**.

Now we see a record of this conversation on the activity timeline so that everyone working on the grant will be aware of it. By adding the contact record, this call record will show up on the activity timeline on Morgan's contact record as well. This helps to consolidate activities across multiple opportunities into one place. If you have donors with multiple opportunities in the works, you can easily see when they were contacted last, and when they were contacted about a specific donation.

Activities vs Deliverables

There is some overlap in the use cases for tracking Activities and tracking Deliverables. One of the main distinctions is long-term reporting ability. When looking at an individual record, you'll be able to see and interact with all of the connected Activities in the timeline and related lists, regardless of their age. But, behind the scenes, [Salesforce automatically archives Activities](#) after one year, so they won't appear in reports.

It is more likely that you would want to report on open deliverables far in the future - or to report on application deliverables from the past - and tracking those on the Deliverables object lets you continue to report on them.

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MANAGE THE GRANT LIFECYCLE WITH PATH

Notice Close Date and Amount in the Highlights panel at the top of the grant opportunity record page. Right below that is a ribbon running across the page with the stages in order of probability, and our current stage—Prospecting—highlighted in blue.

Click the **Show More arrow** next to the blue ribbon to display Key Fields for the opportunity at this stage. Let's fill in a few key details.

Think Like an Admin Tip: You can customize the Key Fields and Guidance for Success for your users to fill in at each stage in the Path component.

1. Our research shows that Save the World Foundation funds youth development as one of their areas of interest. Click the **Edit Program Areas pencil icon** next to Program Areas and fill in **Youth Development**.
2. In the Grants Requirement Website field, fill in www.savetheworld.org/grants.
3. Click **Save**.

Opportunity
Save the World Foundation \$10000 Grant 06/30/2023

+ Follow Edit Delete Clone

Close Date 1/22/2022	Next Deliverable Date	Amount \$7,500.00	Requested Amount \$10,000.00	Primary Campaign Source	Is Grant Renewal ☐
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Prospecting ✓ ✓ Awarded Mark as Current Stage

Key Fields Edit

Close Date
1/22/2022

Program Areas ⓘ
Youth development

Grant Requirements Website ⓘ
www.savetheworld.org/grants

Is Grant Renewal ⓘ
☐

Previous Grant/Gift Opportunity ⓘ

Now that we've submitted our LOI, let's see the Stage field in action. Click the **LOI Submitted** stage on the blue ribbon to highlight it, then click **Mark as Current Stage**. This automatically:

- Updates the Stage field in the blue ribbon.
- Updates the Stage field in the Details tab.
- Changes the probability to 20%.

Let's double-check our Key Fields, and note the Guidance for Success which reminds us to upload a copy of the LOI to the files section.

The Save the World Foundation is happy with the details of the program we shared in our LOI and they invite us to submit a full proposal.

1. Click **Application Submitted** in the blue ribbon.
2. In the Key Fields, click the **Edit Ask Date pencil icon** and set the Ask Date with a date 3 months from today.
3. Click **Save**.
4. Click **Mark as Current Stage**.

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CREATE A PAYMENT SCHEDULE

Good news! The Save the World Foundation just notified us that we received the grant! Now let's make sure we know exactly when to expect our funds with payment records.

By default, NPSP creates a single unpaid payment for open opportunities because this is the most common scenario for small donations. But you can override this behavior and create a schedule to track multiple payments over time.

1. Click the **Payments** link in the Related List Quick Links.
2. Click **Schedule Payments**.
3. For # of Payments, select **2**.
4. For Interval, select **6** for Number and **Month** for Period.
5. In the Date of First Payment field, you can leave the default value of today. NPSP will automatically schedule the second payment 6 months in the future.
6. Click **Calculate Payments**.
7. Review the Payment Amounts and Scheduled Dates that appear to ensure they are correct.
8. Fill in a Payment Date of **today** and select the **Paid** box for the first payment.
9. Click **Create Payments**.

Current Opportunity Info

Opportunity	Save the World Foundation \$10000 Grant 06/30/2023	Amount	\$10,000.00
Stage	Prospecting	Payment Amount Received	\$0.00
Close Date	6/30/2023	Payment Writeoff Amount	\$0.00
		Remaining Balance	\$10,000.00

Create a Payment Schedule

of Payments
2

Date of First Payment
1/26/2022

Interval
Number
2

Period
Month

Payment Method
Check

Calculate Payments

Payments to be Created

PAYMENT NUMBER	PAYMENT AMOUNT	SCHEDULED DATE	PAYMENT DATE	PAID
1	5,000.00	1/26/2022	1/26/2022	☒
2	5,000.00	3/26/2022		☐

Create Payments

NPSP just created two payment records—one paid and one unpaid.

UPDATE GRANT DETAILS

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We've finally moved all of the way through the grant lifecycle. We've researched our grant, applied for it, and now it is fully paid. Go back to the opportunity record for the grant.

1. Hover over the **Payments** link in the **Related List Quick Links** component.
2. Click the **Show Actions down arrow button** in the row for the second payment and select **Edit**.
3. Check the **Paid** box and fill in today's date for the **Payment Date**.
4. Click **Save**.

Now we'll close the grant. Ultimately all opportunities need to be marked either Closed Won for successful applications or Closed Lost for those that are unsuccessful. In this example, we're calling our Closed Won stage Awarded and our Closed Lost stage Withdrawn.

1. Move to the final stage in the grant opportunity process by clicking **Closed** and then the **Select Closed Stage** button.
2. Since we received the grant, select **Awarded** and **Save**.

Think Like an Admin Tip: You can add or remove stages from your grant sales process (that's what we call the group of stages.)

Double-check all remaining fields to make sure they are complete and that all relevant information is filled in. Your future self will thank you!

This example was a grant, but as we saw when we created this opportunity, we could have chosen any of the other six NPSP record types in the same way.

Think Like an Admin Tip Resources

- [Trailhead: Opportunity Settings in Nonprofit Success Pack](#)
- [Trailhead: Nonprofit Success Pack Administration Basics](#)
- [NPSP Documentation: Customize Opportunity \(Donation\) Names](#)
- [NPSP Documentation: Configure Opportunity Payments](#)
- [NPSP Documentation: Configure Grants](#)