

Soft Credits – Version 1.0

Overview

A soft credit scenario is when a donation is made on behalf of someone or some other entity (such as a business or foundation). A hard credit is given to the someone or other entity, as well as a soft credit to the one who receives the credit for it. The soft credits plug in provides a way to establish and view soft credit donations within your church.

Usage

The soft credit plug provides a way to:

1. Establish hard and soft credit relationships between different Rock profiles (people and/or businesses).
2. Edit existing transactions with the correct hard and soft credit relationships.
3. View all soft credit transactions by date range and other useful filters.
4. Provide information related to soft credit transactions on giving statements.

Example:

- *Ted Decker owns Tip Top Tree Shop.*
- *Tip Top Tree Shop makes a donation.*
- *Per this donation, a hard credit is given to Tip Top Tree Shop, and a soft credit is given to Ted Decker.*

Establishing the Hard and Soft Credit Relationship

NOTE: Establishing the hard and soft credit relationship will not trigger any retroactive updating for any transactions in the past. The relationship will only apply to future transactions.

Updating an Existing Transaction

Transaction Detail
Home > Transactions > Transaction Detail

Financial Transaction Batch #442 Contribution

Authorized By

Person: Ted Decker
Home Address: 11624 N 31st Dr, Phoenix, AZ 85029-3202

Date/Time: 12/4/2022 12:00 AM
Payment Method: Other
Updates: Created by Jason Gibb on 12/5/2022 at 9:17 AM, Last Modified by Jason Gibb on 12/5/2022 at 9:17 AM

Accounts	Amount	Soft Credit
General Fund	\$100.00	Admin Admin
Total	\$100.00	

[Edit](#) [Refund](#)

Transaction Detail
Home > Transactions > Transaction Detail

Financial Transaction Batch #442 Contribution

Person: Ted Decker
Amount: \$ 100.00
Additional Accounts

Show As Anonymous:

Transaction Date/Time: 12/4/2022 12:00 AM

Transaction Type: Contribution
This is a Refund: Yes

Source:
Currency Type: Other
Payment Gateway:
Images:
Upload

Transaction Detail
Home > Transactions > Transaction Detail

Financial Transaction Batch #442 Contribution

Person: Ted Decker
Amount: \$ 100.00
Additional Accounts

Show As Anonymous:

Transaction Date/Time: 12/4/2022 12:00 AM

Transaction Type: Contribution
This is a Refund: Yes

Source:
Currency Type: Other
Payment Gateway:
Images:
Upload

Accounts	Amount	Soft Credit
Total	\$0.00	

The image shows two screenshots from a financial management application. The top screenshot is the 'Account' form, where the 'Soft Credit' dropdown menu is highlighted with a red box. The bottom screenshot is the 'Transaction Detail' form, showing a table of accounts with a red box around it and a red arrow pointing from the 'Soft Credit' dropdown in the top screenshot to the 'Soft Credit' column in the table.

Account Form:

- Account: General Fund
- Amount: \$ 100.00
- Soft Credit: [Dropdown menu]

Transaction Detail Form:

Financial Transaction (Batch #442 Contribution)

Person: Ted Decker

Transaction Date/Time: 12/4/2022 12:00 AM

Transaction Type: Contribution

Source: [Dropdown]

Currency Type: Other

Payment Gateway: [Dropdown]

This is a Refund: Yes

Images: [Upload button]

Accounts	Amount	Soft Credit
General Fund	\$100.00	Admin Admin
Total	\$100.00	

View All Soft Credits

The image shows the 'Finance' sidebar menu. The 'Soft Credits' option is highlighted with a red box. The menu is organized into 'FUNCTIONS' and 'ADMINISTRATION' sections.

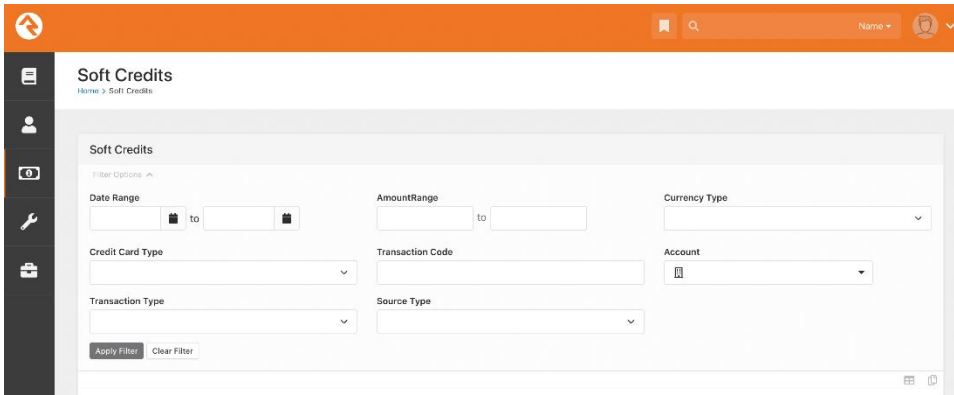
Finance

FUNCTIONS

- Transactions
- Pledges
- Scheduled Transactions
- Batches
- Benevolence
- Fundraising Matching
- Event Registration Matching
- Transaction Fee Report
- Soft Credits**

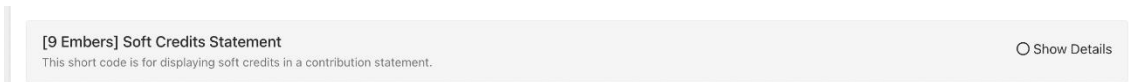
ADMINISTRATION

- Accounts
- Businesses
- Giving Analytics



Including Soft Credits in Giving Statements

A Lava shortcode will be available after installing the plug in (Admin Tools > CMS Configuration > Lava Shortcodes). This short code may be added to your giving statement template in order to include details on those for whom there have been soft credit transactions.



Under Finance > Financial Settings select the Statement Template you wish to add soft credits. Paste the lava shortcode wherever you would like them to appear.

`{[softcreditsstatement personid:'{{Person.Id}}' startdate:'{{StatementStartDate}}' enddate:'{{StatementEndDate}}']}`

Report Template

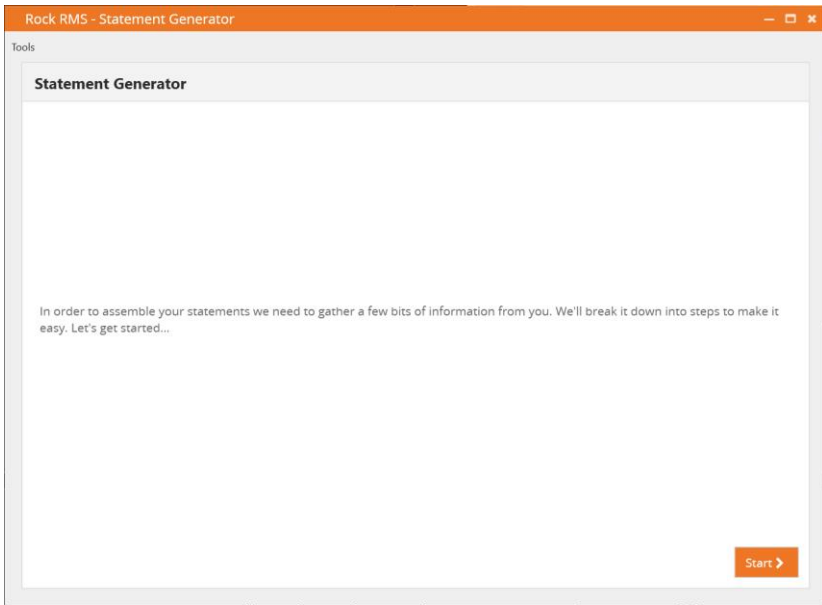
```

222     </div>
223     <div class="col-xs-3">
224         <br />
225         <p>
226             Percent Complete <br />
227             {{ pledge.PercentComplete }}%
228         <br />
229     </p>
230 </div>
231 </div>
232 {% endfor %}
233 {% endif %}
234
235 {[ softcreditsstatement personid:'{{Person.Id}}' startdate:'{{StatementStartDate}}' enddate:'{{StatementEndDate}}' ]}
236
237 <hr style="opacity: .5;" />
238 <p class="text-center">
239     Thank you for your continued support of the {{ organizationName }}. If you have any questions about your statement,
240     email {{ organizationEmail }} or call {{ organizationPhone }}.
241 </p>
242
243 <p class="text-center">
244     <em>Unless otherwise noted, the only goods and services provided are intangible religious benefits.</em>
245 </p>
246
247 </body>
248 </html>

```

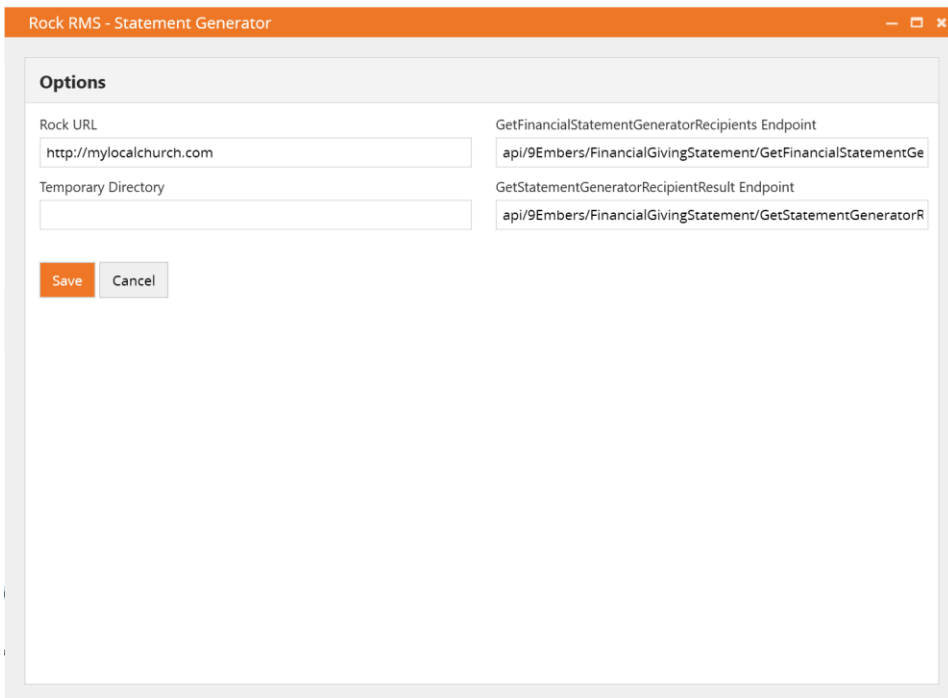
Before running your end of year statements there is an additional step in in the Contribution Statement Generator. You will need to make sure that you are using the version of the Statement Generator that comes with Rock V14.2 or greater. It can be downloaded at this link: <https://storage.rockrms.com/externalapplications/sparkdevnetwork/statementgenerator/1.14.2/statementgenerator.msi> This version allows for changing the endpoints used for downloading contributions.

After starting the Statement Generator and after logging in, click on the Tools button in the top left corner then click Options.



Change the setting `GetFinancialStatementGeneratorRecipients Endpoint` to:
`api/9Embers/FinancialGivingStatement/GetFinancialStatementGeneratorRecipients`

And change the setting `GetStatementGeneratorRecipientResult Endpoint` to:
`api/9Embers/FinancialGivingStatement/GetStatementGeneratorRecipientResult`



You can then click save and process your statements as normal.