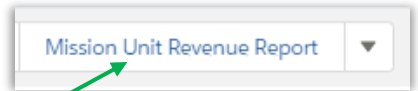


This can be done from any payment. One place to easily locate payments is on your Mission Unit Revenue Report.

### Steps to Edit Fundraiser Field

1. Navigate to your **Mission Unit** record page
2. Run **Mission Unit Revenue Report** by clicking the Quick Action button in top right corner
3. Find donation that needs to be designated to a specific staff member



Report: YL Opportunities with NPSP Payments  
**Mission Unit Revenue Report**  
This report shows Payments, Donations, and Pledges for a specified Mission Unit.

Total Records: 18    Total Payment Amount: \$4,203.13

Mission Unit Code	Primary Contact: Full Name	Donor Payer Account Id: Account Name	Business Date	Payment Amount	Charge Type	Class Code Name	Transaction Type	Payment Type	Remarks
0123456789	John Doe	John Household	9/4/2020	\$500.00	One-Time	Complimentary	Donation	Credit Card	-
	Matthew Brown	Matthew Household	9/3/2020	\$500.00	One-Time	Camp Scholarship	Donation	ACH	-

4. Click on **Payment Number** of donation to edit (*Note: you may need to scroll across the page to see this number!*)

Linked Account Id: Account Name	Donor Advised Fund: Donor Advised Fund Name	Payment Number	Fundraise
John Household	-	PMT-22215112	-

5. Click **Edit Details** in top right corner of payment record page
6. Type in the full name of staff member, and select it from the dropdown list (*The **Primary Campaign** name will be displayed below Fundraiser contact name*)
7. Click **Next**

Edit Details

If you need to edit the Fundraiser field on a Payment, you can do so here.

Fundraiser

Ch...

\* Primary Campaign

1 FY22 Monthly Givers

Next

This field searches for the **Contact Record**, not User. If multiple contacts show up for the same person use the [Merge Request Form](#) to merge those contacts in order to ensure accurate mapping of the payment.

8. On the **Edit Details** screen, select an option.

- **Apply to this payment only** OR
- **Apply to this and all future payment**

**Edit Details**

You are attempting to re-assign the campaign(s) on a recurring gift

Contact : Mar

Business Date : October 22, 2021

Payment Amount : 100

Please select how you would like to apply this change:

\* Select an option

☒ Apply to this payment only

☐ Apply to this and all future payments

Previous Next

9. Click **Next** (A screen appears noting the update made)

10. Click **Finish** to exit

**Edit Details**

Your Payment has been successfully updated.

Finish

11. Confirm the edit by checking the name in **Fundraiser** field of payment report

Payment Number	Fundraiser: Full Name
PMT-22215112	C

## Tips:

If you need to *remove* a name in the Fundraiser Field, contact [Income Processing](#).

Making these edits on the Fundraiser field is valuable because this field is used in the **Mission Unit Staff Support Report** (a Quick Action report) on your MU page to track Personal Donor Development. This report will become more accurate and useful as you fill in the Fundraiser field to designate payments.