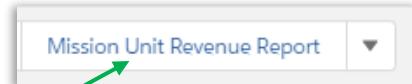


Field Note: Edit Fundraiser Field on a Payment Record

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 Total Payment Amount
18 \$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
QWZV-200	Hol... Household		9/4/2020	\$500.00	One-Time	Camp Scholar...ip	Donation	Credit Card	-
	Matthew... Household		9/3/2020	\$500.00	One-Time	Camp Scholar...ip	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
5 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

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**

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

Contact : Mar [redacted]

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)

Your Payment has been successfully updated.

Finish

10. Click **Finish** to exit

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.