

Bonterra™

**Leveraging Soft Credits
to Recognize Gift
Influence**

Agenda

Soft Credits 101

Adding a soft credit

Acknowledging soft credits

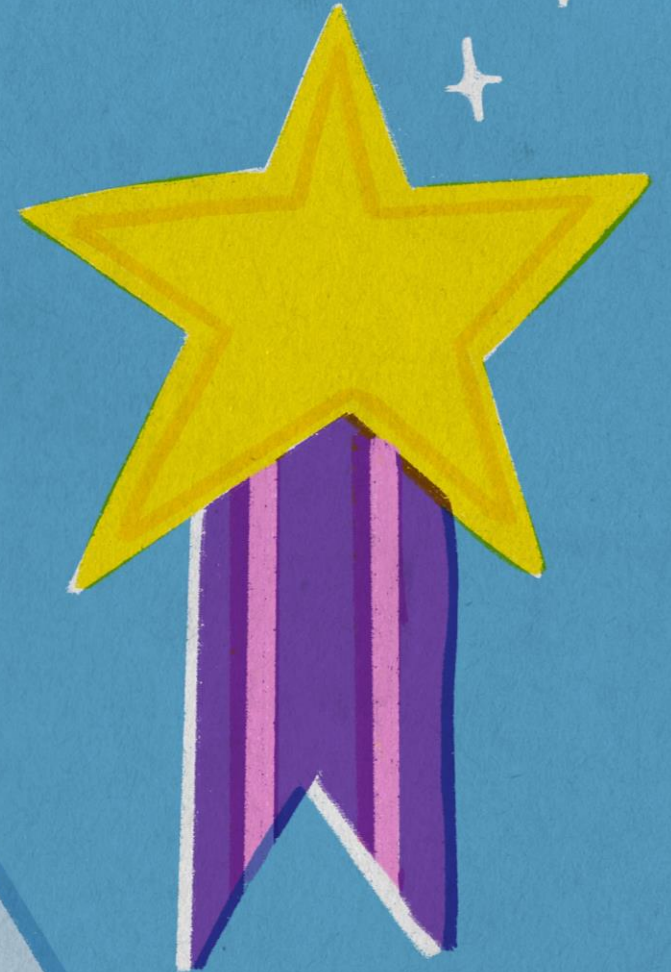
Reporting on soft credits

Soft Credits 101

Soft credits occur when a gift is influenced by someone other than the donor.

Here are some common use cases:

1. A Donor-Advised Fund (DAF) grants a gift from your local Community Foundation or a company like Fidelity or Schwab Charitable
 - The donor in charge of the DAF already received tax credit adding to their fund, and the “hard credit” goes to the organization that sent you the funds
2. A donor’s company has a matching gift program
3. A donation is made in honor of/memory of someone
4. A gift is influenced by a staff steward or community representative



Adding a soft credit

Additional Resources

Contacting the Customer Support Team | 8am – 7pm ET

Chat



- In-app messenger support for quick, technical questions
- Blue dot in bottom right corner of system
- Expect a reply in 2-3 hours



Email



- success@networkforgood.com
- Dedicated team to resolve product problems and questions
- Expect a reply in 2-3 business days

But first!



You can access **View Guides and Help Articles** in the Help tab in your software to find a comprehensive library of articles, guides, walkthroughs, and videos.

Q & A

We value your feedback!

Ask questions about functionality covered in this training

Ask trainer to redo a demo

Ask real-life application questions

Or sign off and we will see you in the next training!



Thank you for attending!

**We hope to see you
in future trainings.**

