

Registration Fees in Salesforce

Rallybound passes registration fees as opportunities (in much the same way as donations), with the registrant being recorded as the donor. By default, registrations are differentiated from donations in name and opportunity record type ID.

Multiple Records

Rallybound's registration process allows registrants to register multiple people at a time, and/or add a donation during the registration process to jump-start their own fundraisers. When this happens, the registrant submits the entire transaction as a single transaction. When syncing this transaction to Salesforce, there are three options:

1. Single Salesforce Donation Record

This will sync the entire transaction to a single opportunity, so the opportunity amount will reflect the total amount of the transaction, including the multiple registration fees and/or donation. The primary registrant will be listed as the donor. Registrants who are fundraisers will be synced as separate contacts (and campaigns, if applicable), but the registration opportunity will not be mapped to their campaign records.

The **advantage** of this option is that it will be easy to reconcile with finances, which show the total amount in a single transaction.

The **disadvantages** of this option are: the donation and registration categories won't reflect the correct amounts allotted to each one, respectively, and individual registrants' registration fees will not be associated with their personal campaigns.

2. Split into Separate Salesforce Donation Records

This will record each registration and/or donation (within the single registration transaction) as its own opportunity in Salesforce. In each opportunity, the primary registrant will be listed as the donor. Each opportunity will also be mapped to the campaigns of individual registrants, respectively, and their contact records will be credited for the transaction with a soft credit.

The **advantages** of this option are: the donation and registration categories will reflect the correct amounts allotted to each one, respectively, and individual registrants' registration fees will be associated with their personal campaigns.

The **disadvantage** of this option is that it will be difficult to reconcile with the finances, which show the total amount in a single transaction.

3. Pricebook Entries

This option is recommended (though it takes some more work to set up): If Rallybound's Apex Sync App 1.42 or greater is being used, line items can be included in the opportunity to delineate the various details, like multiple registrations or an additional donation, and tagged as such. This option includes the advantages of both options above: the categories are internally consistent, and there is a single record of the entire transaction. [Click here](#) to learn more about our Pricebook options and how to set it up. To use this option, set "How would you like registration fees to be handled?" to "Single Salesforce Donation Record", and add the relevant Pricebook Entry IDs for donations and registrations below.

Salesforce Opportunities / Donations

How would you like registration fees handled?

? Single Salesforce D ▾
Single Salesforce
Donation record
Split into separate
Salesforce Donation
records

Donation Name:



Donation Description:



Closed Stage Name:



Soft Credit Role:



Captain Soft Credit for Team Donation?

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Donor Role:



Donation Tribute role:



Opportunity Record Type ID:



Registration Opportunity Record Type ID:



Donation PricebookEntry ID:



Ticket-Default PricebookEntry ID:



Registration Fee PricebookEntry ID:



Refund Stage Name:



Causeview Fund ID:



Don't Push Offline Donations: