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NPSP: Customize Opportunity (Donation) Names

Create your own custom Opportunity Names using any fields from the opportunity itself or fields from related records.

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- Create a Custom Opportunity Name
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Create a Custom Opportunity Name

The Nonprofit Success Pack lets you create your own Opportunity Names using fields from the opportunity itself, fields from records related directly to the opportunity, or fields from the opportunity's associated Primary Contact. When you create a new opportunity, Salesforce automatically uses the naming convention you've specified, and titles the opportunity accordingly.

You can create custom names for any kind of opportunity—donations, matching donations, grants, and so on.

1. In the Nonprofit Success Pack, click the NPSP Settings Tab, and then click **Donations | Opportunity Names**.
2. On the Opportunity Names page, click the New Opportunity Name button.
3. On the Opportunity Name Settings page, specify the settings for your custom opportunity name:

Attribution Specifies whether you want to apply the custom naming convention to Contact donations (i.e. opportunities associated with Household, 1-to-1, or Individual "Bucket" accounts), Organization donations, or both Contact and Organization donations. The NPSP treats any donation that is *not* a Contact donation as an Organization donation.

Opportunity Record Types Specifies the opportunity record type(s) to which you want to apply this opportunity name. Control or Command click to select more than one record type. "None" applies the new

naming to ALL record types.

Opportunity Name Format Specifies the opportunity name format. You can select from a number of out-of-the-box naming conventions, or choose "other" to create your own. (See the next section for more information.) Select Do Not Rename to leave opportunity names untouched.

Date Format The format for any Date or DateTime fields you've included in the opportunity name. Choose "other" to create your own format, following the Java SimpleDateFormat specification (<http://docs.oracle.com/javase/6/docs/api/java/text/SimpleDateFormat.html>).

4. Click **Save**.

Salesforce will use the new custom naming convention for all opportunities of matching record type going forward. To apply the new naming convention to previously created opportunities, see the Refresh topics at the end of this help page.

Opportunity Name Examples

When creating your own opportunity names, simply add any opportunity field to the list of field names, like so:

```
{!Amount} {!CloseDate}
```

You can also add static text to the custom name:

```
Received {!Amount} on {!CloseDate}
```

As well as fields from related records:

```
Received {!Amount} on {!CloseDate} thanks to {!Campaign.Name}
```

And if you really want to get fancy, you can even add fields from the Primary Contact associated with the donation:

```
{!Contact.Name} from {!Contact.MailingCity} gave {!Amount} on {!CloseDate} thanks  
to {!Campaign.Name}
```

Note that if a field does not contain a value, its place in the custom name will be left blank. For example, if the mailing city field for the Primary Contact were empty, the above would read: "Nicolas from gave \$8 on April 29, 2015 thanks to Save the Whales".

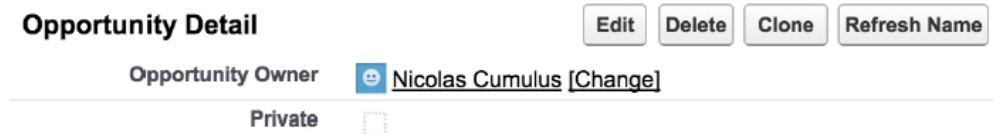
Edit a Custom Opportunity Name

1. In the Nonprofit Success Pack, click the NPSP Settings Tab, and then click **Donations | Opportunity Names**.
2. On the Opportunity Names page, find the opportunity name you want to edit, click the Edit link, make your changes, and click **Save**.

Refresh a Single Opportunity Name

When you create a custom Opportunity Name, Salesforce only uses that naming convention for matching opportunities you create *after* that. But you can refresh the name of a preexisting, matching opportunity, once you've specified your settings.

1. Navigate to the opportunity whose name you want to refresh.
2. Click the Refresh Name button.



NOTE: If you don't see this button, you'll need to add it to your page layout.

Refresh all Opportunity Names

When you create a custom Opportunity Name, Salesforce only uses that naming convention for matching opportunities you create *after* that. But you can refresh the names of all preexisting, matching opportunities, once you've specified your settings.

⚠ IMPORTANT : Refreshing all opportunity names activates a batch process, and renames every matching opportunity in your organization except those opportunities whose Opportunity Name Formats you've marked as "Do Not Rename." The process is irreversible. Exercise caution when refreshing all opportunity names!

1. In the Nonprofit Success Pack, click the NPSP Settings Tab, and then click **Donations | Opportunity Names**.

2. On the Opportunity Names page, scroll down to the Refresh section and click the Refresh All Opportunity Names button.



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