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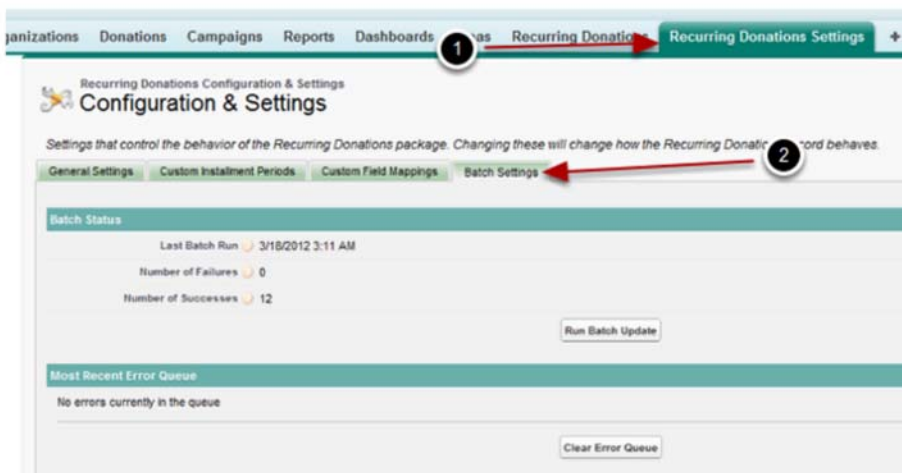
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## NPSP: Understanding the Batch Process & Updating C

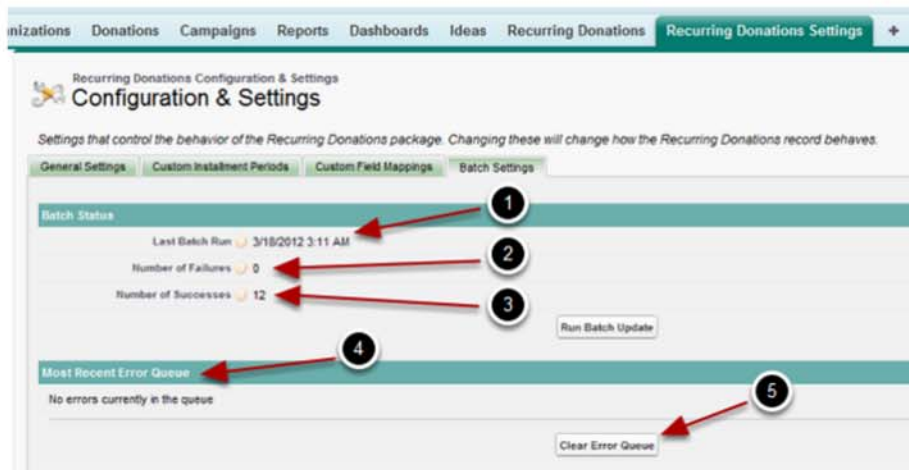
The Recurring Donations package automatically configures a nightly batch process to keep your forecasted donations up-to-date as well as an option to manually initiate the process for either a single, or for all existing Recurring Donations. Simply going to the Recurring Donations Settings tab will automatically configure a nightly recurring job that runs your batch process for you. This article will explain how the process works, and how to initiate it.

### Navigate to Batch Settings Tab



To navigate to the Batch Settings screen, click on the 'Recurring Donations Settings' tab (1), and then the 'Batch Settings' tab. (2)

# Understanding the Batch Settings Tab

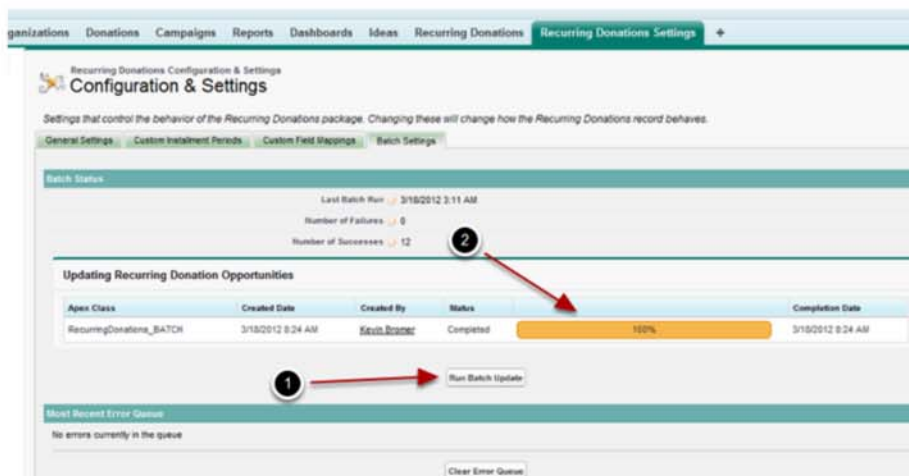


The Batch Settings tab provides you with information about the most recent batch run, including nightly jobs and any batch runs initiated manually.

1. **Last Batch Run** - Shows the date and time of the most recent batch job.
2. **Number of Failures** - Show the number of Recurring Donations that were not able to be updated by the batch process
3. **Number of Success** - Shows the number of Recurring Donations successfully checked and/or updated by the batch process. *NOTE: This may include Recurring Donations records that did not require new donations.*

The 'Most Recent Error Queue' section (4) will show any recognized and known errors that occurred during the most recent batch run if they have not already been sent to a user, system administrator or public group per the setting on the 'General Settings' tab. The error queue resets for each batch run, and can be manually cleared by clicking on 'Clear Error Queue'. (5)

## Running the Batch Process Manually



To manually initiate a batch process, click on the 'Run Batch Update' button (1). A progress bar (2) will appear to track the progress of the batch as it examines all of the existing open Recurring Donations, and evaluates them for new donation records. Manually initiating the process can be useful when entering new Recurring Donations in bulk, or when running forecast report. You do not need to remain on the page for the batch to complete.

**NOTE:** The Error Queue and Batch Status sections will not be updated until you refresh the page or leave and return to the Recurring Donations Settings tab.

## Single Record Update

**Recurring Donations Detail**

Recurring Donation Name: Test Person Recurring Donation

Organization: Test Person

Amount: \$50.00

Open Ended Status: Open

Next Donation Date: 6/9/2012

Last Donation Date: 3/9/2012

Installment Amount: \$50.00

Total: \$500.00

Created By: Kevin Brown 3/9/2012 3:17 PM

Owner: Kevin Brown (Charged)

Date Established: 3/9/2012

Installments: 0

Schedule Type: Quarterly

Installment Period: Quarterly

Donor Name: Test Person

Campaign: Test Person

Paid Amount: \$50.00

Total Paid Installments: 1

Last Modified By: Kevin Brown 3/11/2012 3:25 PM

**Donations**

Action	Donation Name	Organization Name	Close Date	Stage
Edit	Test Person Donation (1) 3/9/2012	Test Person	3/9/2012	Closed Won
Edit	Test Person Donation (2) 3/9/2012	Test Person	6/9/2012	Pledged
Edit	Test Person Donation (3) 3/9/2012	Test Person	3/9/2012	Pledged
Edit	Test Person Donation (4) 12/9/2012	Test Person	12/9/2012	Pledged
Edit	Test Person Donation (5) 3/9/2012	Test Person	3/9/2012	Pledged

To initiate the update process for a single Recurring Donation, click the 'Refresh Opportunities' button (1) on the Recurring Donations page. You may need to edit your page layout to display the button if it is not visible.

## Nightly Recurrence

**All Scheduled Jobs**

The All Scheduled jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.

View: All Scheduled jobs (1) Create New View

Action	Job Name	Scheduled By	Scheduled	Start	Next Scheduled Run	Type
Manage	Recurring Donations Updates	Kevin Brown	3/12/2012 3:09 PM	3/12/2012 3:11 AM	3/12/2012 3:11 AM	Scheduled App

**System Overview**

- Personal Setup
- My Personal Information
- My Email
- My Import
- My Integration
- My Chatter Settings
- App Setup
- Customize
- Create
- Settings
- Schema Builder
- Installed Packages
- AppExchange Navigation
- Control Updates
- Administration Setup
- Manage Users
- Company Profile
- Security Controls
- Communication Templates
- Translation Handbook
- State Sharing
- Monitoring
- Imports
- Outbound Messages
- Time-Based Workflow
- Automated Process Builder
- Case Escalations
- API Usage Notifications
- Web Events
- Setup Logs
- System Logs

You can delete the active nightly job if you need to reschedule. However, you will need to re-visit the Recurring Donations Settings tab in order for a new job to be created. In order to delete the existing job or view information about it, you can click on 'Setup', then 'Monitoring' (1), 'Scheduled Jobs' (2) and identify the job by its name, 'Recurring Donations Updates' (3).



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