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## NPSP: Creating New Recurring Donations

This article covers creating new Recurring Donations and which fields control which behaviors of your Recurring Donations records.

### Two Different Types of Recurring Donations

Starting with version 2.0, there are two different types of Recurring Donations available for you to create.

**Non-open-ended Recurring Donations** - Non-open-ended Recurring Donations create a set of Opportunities per a predefined schedule at the time the Recurring Donations record is updated. Any subsequent updates or edits to the Recurring Donations record or the associated Opportunities will not affect either the Opportunities or Recurring Donations record itself.

**Open Ended Recurring Donations** - Open ended Recurring Donations creates a set of Opportunities per a predefined schedule out to a certain time in the future (default is 12 months) As Opportunities are closed, statistics are updated on the Recurring Donation object to reflect the changes. In addition, every evening the Recurring Donation checks to see if additional Opportunities need to be created to maintain 12 (or whatever your settings are configured to) months worth of Opportunities, based on the schedule you define.

### Creating Recurring Donations



1. Click on the 'Recurring Donations' tab. If the tab is not visible, you may need to add it to your app, or your list of available tabs. Please see standard Salesforce.com help for instructions on adding a tab.
2. Click 'New'

# Non-Open-Ended Recurring Donations

The screenshot shows the 'New Recurring Donations' form in Salesforce NPSP. The form is titled 'Recurring Donations Edit' and contains various fields for creating a new recurring donation. Numbered callouts 1 through 10 point to specific fields: 1. Recurring Donation Name, 2. Organization, 3. Amount, 4. Open Ended Status, 5. Date Established, 6. Installments, 7. Schedule Type, 8. Installment Period, 9. Campaign, and 10. Save button.

To create a Non-Open-Ended Recurring Donation, select a value for the 'Open Ended Status' field that does **not** correspond to the open donation status (default for Open-Ended donations is 'Open'). The following fields are used for non-open-ended donation creation. Additional formula fields provide information once the record is created.

1. Provide a Name for your Recurring Donation
2. Select either an Account or Contact to link the created Opportunities
3. Enter the Amount to be either multiplied or divided (determined by the Schedule Type field) over the created Donations
4. Set to a Non-open status
5. Sets the close date of the first Opportunity created, all subsequent donations have their dates based on this date.
6. Total number of Opportunities to be created
7. Determines if the 'Amount' value is divided or multiplied over the created Opportunities
8. Determine the schedule of Opportunities based on the Date Established field
9. The Campaign for the created Opportunity's Primary Campaign Source field

Click 'Save' (10) when complete.

*Note: Your fields may be different depending on your page layout and record type settings.*

## Non-Open-Ended Recurring Donations (cont.)

The screenshot shows the 'Recurring Donations Detail' page in Salesforce NPSP. The page displays the details of a 'Non-Open Ended Donation' record. Numbered callouts 1 through 3 point to specific fields: 1. Date Established, 2. Installments, and 3. Campaign. Below the details, there is a table showing the generated opportunities.

id	Donation Name	Organization Name	Close Date	Stage	Amount
001	Test Person Donation (at 10/1/2012)	Test Org	10/1/2012	Paid	\$10.00
002	Test Person Donation (at 10/1/2012)	Test Org	10/1/2012	Paid	\$10.00
003	Test Person Donation (at 10/1/2012)	Test Org	10/1/2012	Paid	\$10.00
004	Test Person Donation (at 10/1/2012)	Test Org	10/1/2012	Paid	\$10.00
005	Test Person Donation (at 10/1/2012)	Test Org	10/1/2012	Paid	\$10.00

1. Installment Amount provides the Amount used for the Opportunities based on the Schedule Type and the Amount
2. Total is the sum total of all the Opportunities associated with the Recurring Donation
3. Donor Name is the name of either the Account or Contact associated with the Recurring Donation

The screenshot shows the 'New Recurring Donations' form in the 'Recurring Donations Edit' view. The form is divided into two main sections: 'Information' and 'Details'. Red arrows and numbered circles (1-9) highlight specific fields and buttons.

- 1**: Points to the 'Save' button at the top of the form.
- 2**: Points to the 'Recurring Donation Name' field.
- 3**: Points to the 'Organization' field.
- 4**: Points to the 'Contact' field.
- 5**: Points to the 'Amount' field.
- 6**: Points to the 'Owner' field.
- 7**: Points to the 'Date Established' field.
- 8**: Points to the 'Installments' field.
- 9**: Points to the 'Save' button at the bottom of the form.

The form includes the following fields and options:

- Recurring Donation Name**: Open Ended Recurring
- Organization**: Orlanston pte
- Contact**: [Empty]
- Amount**: 10
- Open Ended Status**: Open
- Next Donation Date**: 4/1/2012
- Last Donation Date**: [Empty]
- Owner**: Kevin Bromar
- Date Established**: 3-18-2012
- Installments**: 1
- Schedule Type**: --None--
- Installment Period**: 1st and 15th
- Campaign**: Over Conference - Jun
- Next Amount**: [Empty]
- Total Paid Installments**: [Empty]

1. Provide a Name for your Recurring Donation
2. Select either an Account or Contact to link the created Opportunities
3. Enter the Amount for the created Opportunities
4. Set to the open status
5. Sets the date of the first Opportunity to be created. Overrides the Date Established field.
6. By default, the date the Recurring Donation is created and is used as the first Opportunity Close Date if a 'Next Donation Date' is not provided
7. Determine the schedule of Opportunities based on the Date Established field
8. The Campaign for the created Opportunity's Primary Campaign Source field

*Note: Your fields may be different depending on your page layout and record type settings.*

The screenshot displays the 'Open Ended Recurring Donation' page in the Salesforce interface. The page is titled 'Recurring Donations Detail' and shows information for a donation from 'Salesforce' to 'DonationBox, Inc.' The donation is open-ended, with a total amount of \$10.00. A red arrow points from the 'Total' field to the 'Next Scheduled Date' field, indicating the next payment date. Below the details, a table lists the donation history with columns for 'Date', 'Donation Name', 'Organization Name', 'Close Date', 'Stage', and 'Amount'.

Date	Donation Name	Organization Name	Close Date	Stage	Amount
4/1/2012	DonationBox, Inc. Donation	DonationBox, Inc.	4/1/2012	Pending	\$10.00
4/15/2012	DonationBox, Inc. Donation	DonationBox, Inc.	4/15/2012	Pending	\$10.00
5/1/2012	DonationBox, Inc. Donation	DonationBox, Inc.	5/1/2012	Pending	\$10.00
5/15/2012	DonationBox, Inc. Donation	DonationBox, Inc.	5/15/2012	Pending	\$10.00
6/1/2012	DonationBox, Inc. Donation	DonationBox, Inc.	6/1/2012	Pending	\$10.00

Once saved, the 'Installments' (1) field is updated with the total number of Opportunities associated with the Recurring Donation. The formula fields (2) are only used for non-open-ended Recurring Donations and should not be referenced for Open-Ended Recurring Donations

*NOTE: The field may not update immediately and a refresh of the page may be necessary to see the new value*



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