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NPSP: Configuring & Understanding Custom Field Mapping

This article provides configuration and background information on working with Custom Installment Periods. Custom Field Mappings allow you to define your own Custom Field Mappings types for your Recurring Donations.

Navigate to the Custom Field Mapping Tab



Click on the 'Recurring Donations Settings' tab (1), and then 'Custom Field Mappings' (2)

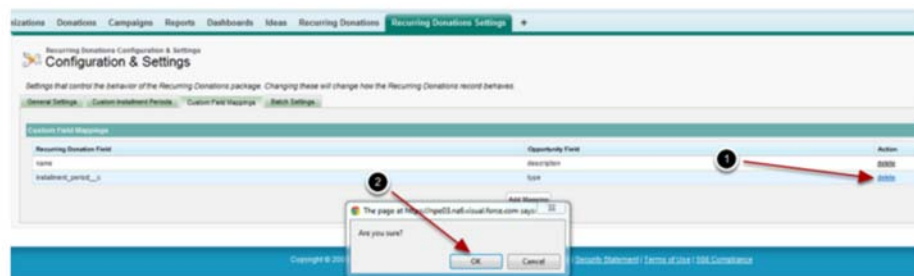
Add a New Mapping



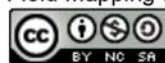
Click the 'Add Mapping' button (not show here). Select the field from the Recurring Donation object you wish to copy to the Opportunities when they are created (1), and then the Opportunity field to hold the data (2). When complete, click 'Save' (3)

The fields must be of the same type in order to save properly. If the fields mismatch, you'll receive a warning message at the top of the screen (4). ID fields must be of the same ID type (for example, an Owner ID on the Opportunity field must be a User ID, Account to Account, etc.) Each Opportunity field may only be selected once, and some may not be available for this list.

Delete a Mapping



To delete an existing Custom Field Mapping, click 'Delete' next to the Field Mapping (1), and then 'OK' to confirm. (2)



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