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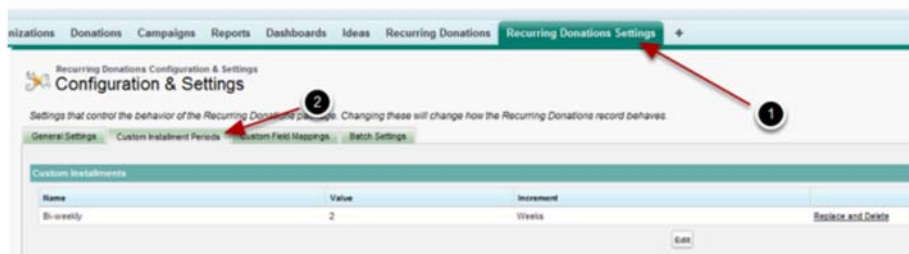
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NPSP: Configuring & Understanding Custom Installme

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

Navigate to the Custom Installments Periods Tab



1. Click on 'Recurring Donations Settings'
2. Click on 'Custom Installment Periods'

Existing Custom Installments



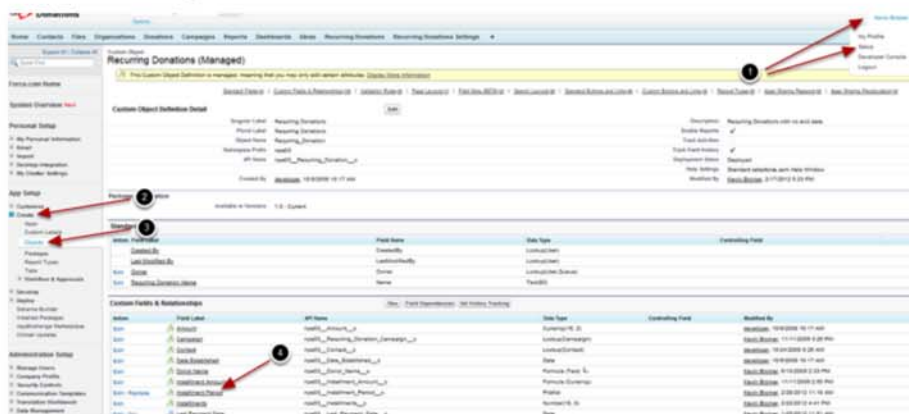
Existing Custom Installments (if any), are displayed under the Custom Installment section header (1). Clicking 'Edit' (2) will allow you to edit existing installments, or create new ones. **NOTE: Editing existing Custom Installments will NOT cause existing Recurring Donations with that Installment value to be recalculated. If you wish to recalculate those values, you'll want to create your new installment first, then delete your old one and replace it.**

Adding a New Installment (part 1)



After click 'Edit', you can edit existing installments (1), including the name, installment "value" (2) (this is the number of the interval) and the Interval type (3). All non-positive-integer values for the Custom Installment Value will be truncated to their integer type. (1.5 will be truncated to 1, etc.). Name values must be unique. You can add new Custom installments by click the Add New Custom Installment link (4) to add an additional row to the table. Click 'Save' when complete (5).

Adding a New Installment Period (part 2)



After saving the Custom Installment record, you'll also need to add your Custom Installment Name to the Installment Period picklist. To edit the picklist, go to <YourName>, Setup (1), Create (2), Objects (3), then select Recurring Donations (not shown). Finally, click on 'Installment Period' (4).

Adding a New Installment Period (part 3)

Recurring Donations Custom Field: Installment Period (Managed)

Custom Field Definition Detail

Field Information

Field Label	Installment Period	Field Name	Field Type	Default Value	Default Date
Installment Period	Installment Period	installment_period__c	Text		

Package Information

Available in Versions: 1.0 - Current

Field Dependencies

No dependencies defined

Validation Rules

No validation rules defined

Picklist Values

Value	Default	Created By	Created On	Modified By	Modified On
Bi-weekly		System Administrator	10/10/2013 10:17 AM	System Administrator	10/10/2013 10:17 AM
Quarterly		System Administrator	10/10/2013 10:17 AM	System Administrator	10/10/2013 10:17 AM
Monthly		System Administrator	10/10/2013 10:17 AM	System Administrator	10/10/2013 10:17 AM
Yearly		System Administrator	10/10/2013 10:17 AM	System Administrator	10/10/2013 10:17 AM

Click 'New' (1) to add your name. The name must be an **exact** match to the name used for your Custom Installment. In the example above, 'Bi-weekly'.

Deleting & Replacing a Custom Installment (part 1)

Recurring Donations Configuration & Settings

Settings that control the behavior of the Recurring Donations package. Changing these will change how the Recurring Donations record behaves.

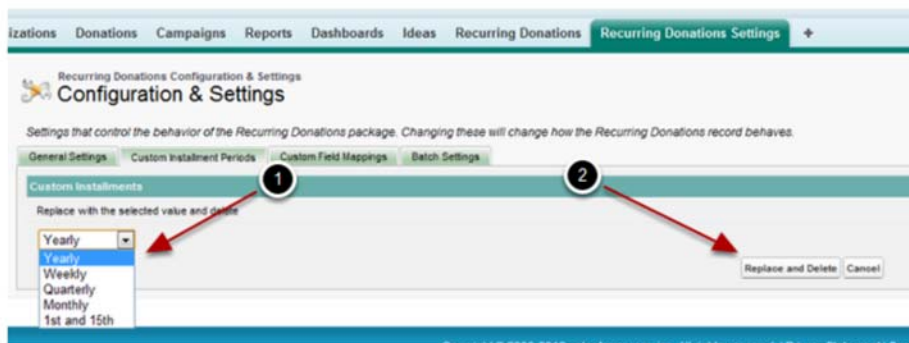
General Settings | Custom Installment Periods | Custom Field Mappings | Batch Settings

Custom Installment Periods

Name	Value	Increment	Actions
Bi-weekly	2	Weekly	Replace and Delete

Delete a Custom Installment is easy. Like Record Types, when you delete a Custom Installment, you'll need to replace it with another Installment Period, either standard or Custom. To delete and replace, click the 'Replace and Delete' link (1) next the Custom Installment.

Deleting & Replacing a Custom Installment (part 2)



Select the value you want to replace your Custom Installment with (1), and click 'Replace and Delete' (2) to finalize the replacement and delete your Custom Installment.



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