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NPSP: Editing Existing Recurring Donations

Editing existing Recurring Donations can affect open Opportunities for that Recurring Donation. This article will show you how changes to a Recurring Donation marked as open-ended and its associated Opportunities are reflected in changes to the other.

Closing & Modifying Opportunities

Recurring Donations Detail

Information

Recurring Donation Name	Editable Recurring Donation
Organization	
Contact	Scout Bomer
Source Name	Scout Bomer
Amount	\$10.00
Open Order Status	Open
Date Entered	3/22/2012

System Information

Created By: Admin User 3/22/2012 9:30 AM

Last Modified By: Admin User 3/22/2012 9:30 AM

Donations

Action	Opportunity Name	Amount	Close Date	Stage	Amount
Go	Scout Bomer Donation (3/22/2012)	Scout Bomer	3/22/2012	Closed Won	\$10.00
Go	Scout Bomer Donation (4/1/2012)	Scout Bomer	4/1/2012	Paid	\$10.00
Go	Scout Bomer Donation (4/15/2012)	Scout Bomer	4/15/2012	Paid	\$10.00
Go	Scout Bomer Donation (5/1/2012)	Scout Bomer	5/1/2012	Paid	\$10.00
Go	Scout Bomer Donation (5/15/2012)	Scout Bomer	5/15/2012	Paid	\$10.00

Showing 5 records - 1 to 5 of 5 (100%)

Marking an existing Opportunity as Closed Won (or any other Closed/Won status) will cause updates to its parent Recurring Donation. Here we see the first Opportunity for this Recurring Donation has been marked Closed Won (1). The following fields are updated on the Recurring Donation:

2. Next Donation Date will reflect the next most recent Opportunity Close Date
3. Last Donation Date will show the close date of the most recently closed Opportunity
4. Paid Amount will be updated to include the total amount of all Opportunities marked with a Closed/Won status
5. Total Paid Installments will show that number of Opportunities marked with a Closed/Won status

Note: Any additional changes to the Opportunity, including to the Opportunity Close Date, will not have an effect on the parent Recurring Donation. The Last Donation Date will always reflect the most recent Close Date.

Modifying the Amount

Recurring Donations Detail

Information

Recurring Donation Name	Editable Recurring Donation
Organization	
Contact	Scout Bomer
Source Name	Scout Bomer
Amount	\$10.00
Open Order Status	Open
Date Entered	3/22/2012

System Information

Created By: Admin User 3/22/2012 9:30 AM

Last Modified By: Admin User 3/22/2012 9:30 AM

Donations

Action	Opportunity Name	Amount	Close Date	Stage	Amount
Go	Scout Bomer Donation (3/22/2012)	Scout Bomer	3/22/2012	Closed Won	\$10.00
Go	Scout Bomer Donation (4/1/2012)	Scout Bomer	4/1/2012	Paid	\$10.00
Go	Scout Bomer Donation (4/15/2012)	Scout Bomer	4/15/2012	Paid	\$10.00
Go	Scout Bomer Donation (5/1/2012)	Scout Bomer	5/1/2012	Paid	\$10.00
Go	Scout Bomer Donation (5/15/2012)	Scout Bomer	5/15/2012	Paid	\$10.00

Showing 5 records - 1 to 5 of 5 (100%)

Changing the Amount field on the Recurring Donation object (1) will cause any open Opportunities associated with that Recurring Donation to be updated with the new Amount (2). Any Opportunities already marked with a Closed/Won status will not be affected. (3)

Modifying the Installment Period

Modifying the Installment Period field (1) will cause any existing open Opportunities to be deleted, and a new set of Opportunities reflecting the changed schedule to be inserted (2) based on the Next Donation Date (3).

Modifying the Next Donation Date field (1) will set the next due Opportunity to match that date (2), and then adjust all remaining open Opportunities based on the new date and defined schedule (3)

[illegible]

Changing the Contact or Organization Name (1) will result in all remaining outstanding Opportunities being updated with the new Name (2).

NOTE: Any changes to the Contact field will result in the remaining open Opportunities being deleted, and then recreated. Any user data on those Opportunities may be lost.

Adding a Campaign

Recurring Donations Detail

Information

Recurring Donation Name	Editable Recurring Donation	Next Donation Date	4/5/2012
Organization	Acme, Inc.	Last Donation Date	3/22/2012
Contact	Acme, Inc.	Installment Period	Monthly
Donor Name	Acme, Inc.	Installments	14
Amount	\$15.00	Paid Amount	\$10.00
Open Ended Status	Open	Total Paid Installments	1
Date Initiated	3/22/2012	Campaign	No Test Campaign

System Information

Created By: Admin User 3/22/2012 12:09 PM
Last Modified By: Admin User 3/22/2012 12:07 PM

Donations

action	Opportunity Name	Amount	Close Date	Stage	Amount
edit	Acme, Inc. Donation (3/22/2012)	\$15.00	4/5/2012	Paid	\$10.00
edit	Acme, Inc. Donation (3/22/2012)	\$15.00	4/12/2012	Paid	\$10.00
edit	Acme, Inc. Donation (3/22/2012)	\$15.00	4/19/2012	Paid	\$10.00
edit	Acme, Inc. Donation (3/22/2012)	\$15.00	4/26/2012	Paid	\$10.00
edit	Acme, Inc. Donation (3/22/2012)	\$15.00	5/3/2012	Closed Won	\$10.00

You can add a Campaign to an existing Recurring Donation (1), and that Campaign will automatically be copied to the first, or all existing open Opportunities, depending on your Recurring Donations Settings.

Closing an Open Ended Recurring Donation

Recurring Donations Detail

Information

Recurring Donation Name	Editable Recurring Donation	Next Donation Date	4/5/2012
Organization	Acme, Inc.	Last Donation Date	3/22/2012
Contact	Acme, Inc.	Installment Period	Monthly
Donor Name	Acme, Inc.	Installments	14
Amount	\$15.00	Paid Amount	\$10.00
Open Ended Status	Closed	Total Paid Installments	1
Date Initiated	3/22/2012	Campaign	No Test Campaign

System Information

Created By: Admin User 3/22/2012 12:09 PM
Last Modified By: Admin User 3/22/2012 12:04 PM

Donations

action	Opportunity Name	Amount	Close Date	Stage	Amount
edit	Acme, Inc. Donation (3/22/2012)	\$15.00	4/5/2012	Closed Lost	\$10.00
edit	Acme, Inc. Donation (3/22/2012)	\$15.00	4/12/2012	Closed Lost	\$10.00
edit	Acme, Inc. Donation (3/22/2012)	\$15.00	4/19/2012	Closed Lost	\$10.00
edit	Acme, Inc. Donation (3/22/2012)	\$15.00	4/26/2012	Closed Lost	\$10.00
edit	Acme, Inc. Donation (3/22/2012)	\$15.00	5/3/2012	Closed Won	\$10.00

Setting the Open Ended Status (1) to 'Closed' (or whatever close status is defined by your custom labels, see 'Working with Custom Labels' for more information) will result in any remaining open Opportunities (2) being marked Closed Lost, deleted, or not affected, depending on your Recurring Donations Settings configuration.



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