



Home Chatter User Groups Knowledge Knowledge Article Entry

[Show Feed](#)[Follow](#)[Rate This Article](#)

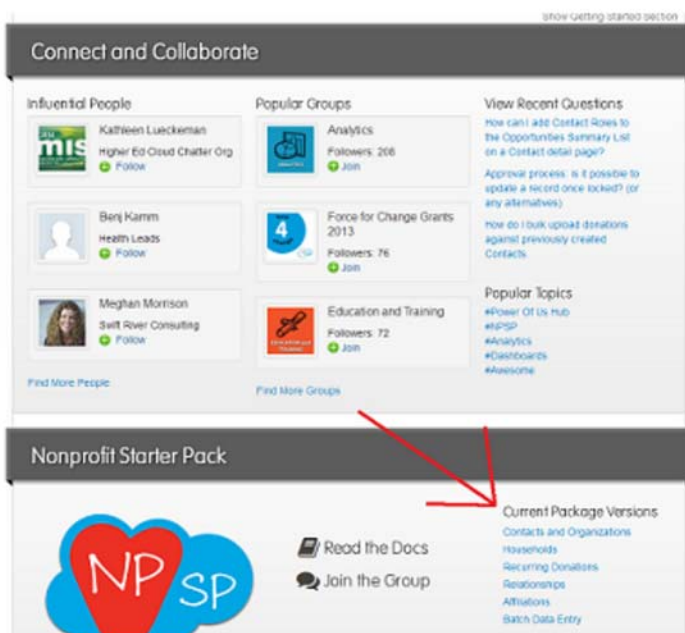
(Average Rating: No Rating)

[Edit](#)[Version 1](#)[Show Properties](#)

## NPSP: Updating or Installing Recurring Donations 2.0

This article will explain the steps necessary to install and configure Recurring Donations 2.0 into a new or existing Salesforce.com org, including those running earlier versions of the Recurring Donations package. NOTE: It is ALWAYS recommended to install to a sandbox or developer edition, prior to installing to your production instance, to confirm compatibility and test functionality.

## Click on the Install Link



1. Navigate the supported browser of your choice to powerofus.force.com and login using your Salesforce credentials

2. Click on 'Recurring Donations'

## Confirm Installation

The screenshot shows the 'Nonprofit Starter Pack' header with the Salesforce Foundation logo. Below it is a blue banner with a warning icon and the text 'Recurring Donations - First Open Source Re'. The main content area is titled 'Required Fields and Validation Rules' and contains several paragraphs of text. A red arrow points from a circled '1' to the 'Installation Notes' link. Another red arrow points from a circled '2' to the 'Continue and install the package...' link. A third red arrow points from the 'Continue and install the package to a sandbox...' link back to the 'Continue and install the package...' link.

**Required Fields and Validation Rules**

When packages are installed, code is run to make sure everything is working. If these 'tests' pass, the package can install correctly. If the tests fail, the package won't install.

Tests may fail for lots of reasons, but there are a couple common ones. If you have required fields on objects related to the package, the tests may not be able to create records, causing test failure. The same is true of validation rules--the test has no way of knowing what rules you have, and so can't create records.

If you get an install failure, you can try again after you've turned off your required fields and validation rules.

**If you are upgrading an existing installation:**

As of version 1.16, a 'Recurring Donations & Pledges' tab is included in the package. If you already have a tab with this name, you will have to delete it before upgrading this package.

To delete the tab:

1. Click on Setup | App Setup | Create | Tabs
2. Delete the tab named 'Recurring Donations & Pledges'>

You'll only have to delete that tab the first time you upgrade to 1.16 or higher.

It is recommended that you read the full [Installation Notes](#).

[Continue and install the package...](#)

[Continue and install the package to a sandbox...](#)

1. Read Installation Notes, confirm all Required Fields and Validation Rules have been disabled
2. Click link to install to production/developer edition or sandbox

## Login to Your Org



1. Provide your login information to your sandbox or production org

## Confirm Package Components

### Package Installation Details

Package Name	Recurring Donations
Version Name	2.0
Version Number	2.0.0.0
Author	Salesforce.com Foundation
Description	

1 [Continue](#) [Cancel](#)

#### Package Components

▼ Resources (5)

Action	Component Name	Parent Object	Component Type	Installation Notes
Update	Spanish		Language Translation	This is an upgraded component. It is a version.
Create	New Recurring Asset Donation	Recurring_Donation__c	Button or Link	This is a brand new component.
Create	Recurring Donation Layout	Recurring_Donation__c	Page Layout	This is a brand new component.
Create	New Recurring Contact Donation	Recurring_Donation__c	Button or Link	This is a brand new component.
Create	Refresh Opportunities	Recurring_Donation__c	Button or Link	This is a brand new component.
Update	French		Language Translation	This is an upgraded component. It is a version.

▼ Pages (3)

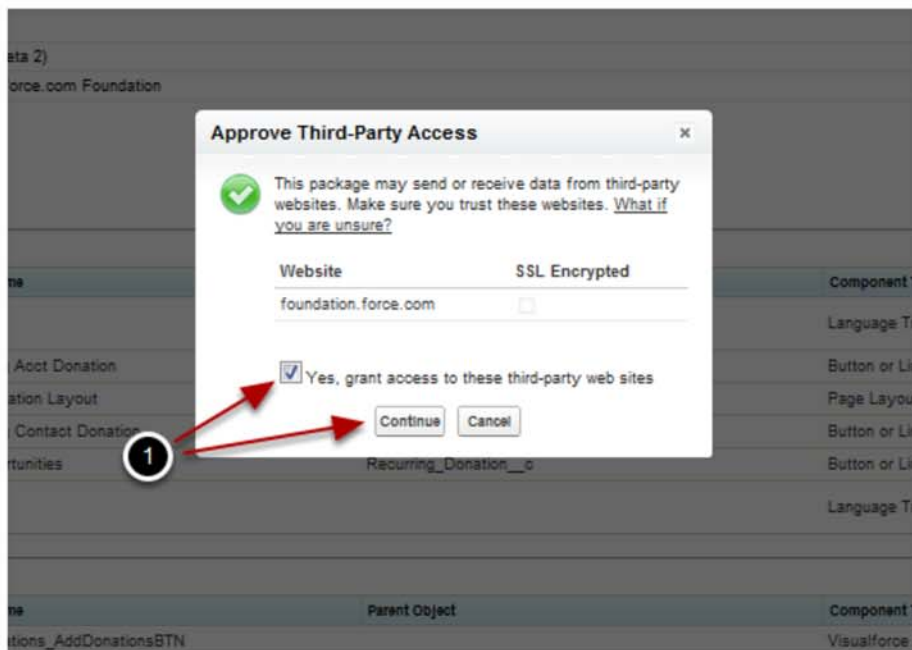
Action	Component Name	Parent Object	Component Type	Installation Notes
Create	RecurringDonations_AssDonationsCtrl		Visualforce Page	This is a brand new component.
Create	Isatchika		Visualforce Component	This is a brand new component.
Create	RecurringDonationsSettings		Visualforce Page	This is a brand new component.

▼ Code (12)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	RecurringDonations_BATCH		Apex Class	This is a brand new component.
Create	RecurringDonations_SCHED		Apex Class	This is a brand new component.
Create	RecurringDonations_TEST		Apex Class	This is a brand new component.
Create	Donations	Opportunity	Apex Trigger	This is a brand new component.
Create	RecurringDonations_AssDonationsCtrl		Apex Class	This is a brand new component.
Create	RecurringDonations_AssProgressCtrl		Apex Class	This is a brand new component.
Create	RecurringDonations_PaymentControl		Apex Class	This is a brand new component.

1. Confirm the components to be added as part of the package, and click 'Continue'.

## Confirm 3rd-Party Access



1. Click to confirm access to foundation.force.com. This is so your NPSP instance will automatically notify you of new versions of your package as they come available.

## Confirm Object Permissions



1. Confirm the object permissions for the installed components, and click 'Next' to continue.

## Choose Security Level



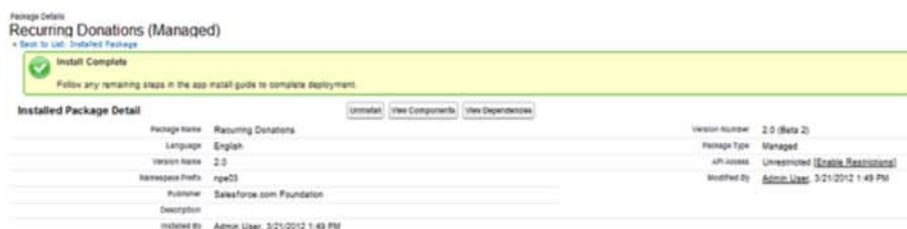
1. For nearly all deployments, select 'Grant Access to All Users'. If you are uncertain of which option to choose, select 'Grant Access to All Users'
2. Click 'Next' to continue

## Install



1. Click 'Install' to install the package.

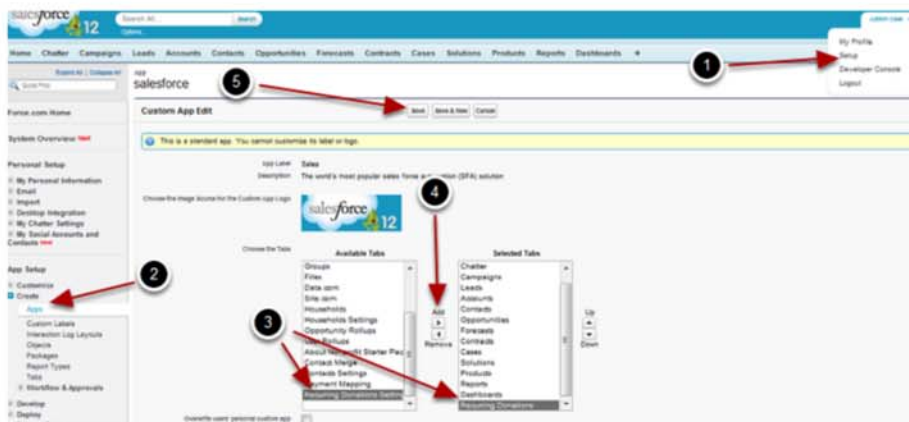
## Wait for Installation to Complete



Your install may complete immediately or may be slightly delayed. If there is a delay, you will receive notification via email that it is complete.

## Add Recurring Donations Tabs to Your Apps (optional)

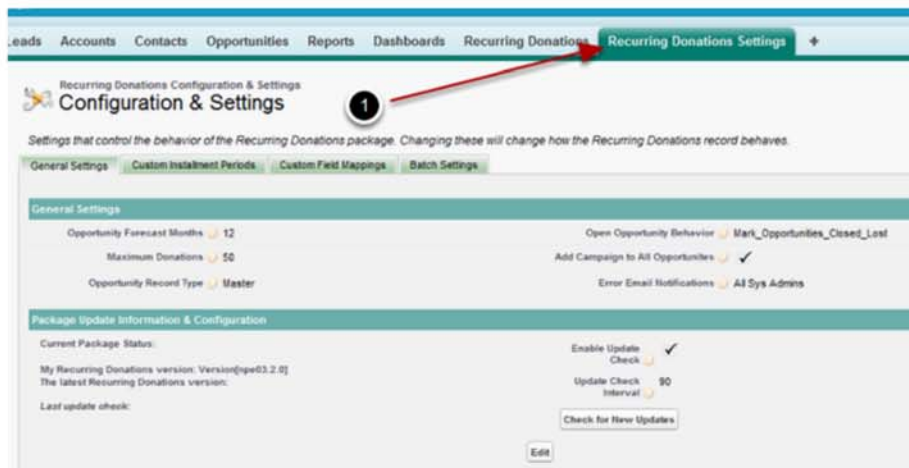




You can optionally add one or both of the tabs included with the Recurring Donations package to your tab row.

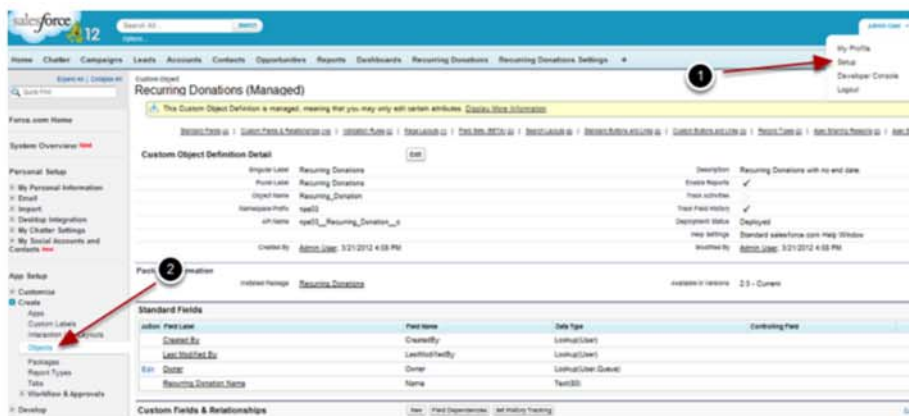
1. Click your user name and then 'Setup'
2. Click 'Create' and then 'Apps'. Click 'Edit' next to the name of the App you want to add the tabs to. (not shown)
3. Highlight the Recurring Donations tab you wish to add
4. Click the 'Add' arrow to add it to the selected tabs list.
5. When complete, click 'Save'

## Configure Settings



1. Click on the 'Recurring Donations Settings' tab and configure your settings as required for your organization. More information on configuring your settings can be found in this Knowledge Base by searching for 'Recurring Donations'

### Add Record Types (optional)

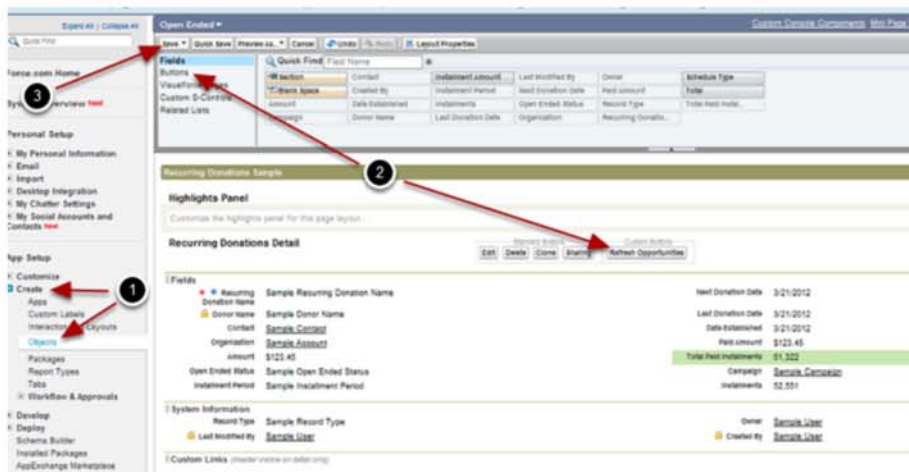


You optionally may wish to create record types to differentiate between your open-ended and non-open-ended Recurring Donations for security or org-wide policy reasons. To create record types, go to:

1. Your name, and then 'Setup'
2. Create, and then 'Objects'.

Click on 'Recurring Donations' in the object list (not shown) and then 'New' in the Record Types section (not shown).

## Create Page Layouts



You can also setup a pagelayout or (multiple pagelayouts if you're using record types). To add pagelayouts:

Click on your name and Setup (not shown)

1. Click on Create and 'Objects'

Click on 'Recurring Donations' and then 'New' under the Pagelayouts section (or edit next to an existing layout - not shown)

2. Click on 'Buttons' and drag the 'Refresh Opportunities' button to the Custom Buttons section.

Drag fields and sections onto the layout as needed. Shown above is an example layout for an Open-Ended Recurring Donation layout. If using other types of Recurring Donations, you can also include the Installment Amount, Schedule Type and Total fields.

3. Click 'Save' when complete



(/\_ui/core/userprofile/UserProfilePage?u=00580000003egB0AAI) Contribution by Kevin Blais (/\_ui/core/userprofile/UserProfilePage?u=00580000003egB0AAI)  
salesforce.com



([http://creativecommons.org/licenses](http://creativecommons.org/licenses/by-nc-sa/3.0/deed.en_US)

[/by-nc-sa/3.0/deed.en\\_US](http://creativecommons.org/licenses/by-nc-sa/3.0/deed.en_US))

This work is licensed under a Creative Commons

Attribution-NonCommercial-ShareAlike 3.0 Unported License ([https://creativecommons.org/licenses/by-nc-sa/3.0/deed.en\\_US](https://creativecommons.org/licenses/by-nc-sa/3.0/deed.en_US)).

Power of Us Hub brought to you by



Copyright © 2013 [Salesforce.com Foundation](#) | [Community Guidelines](#) | [Terms of Service](#) | [Logout](#)