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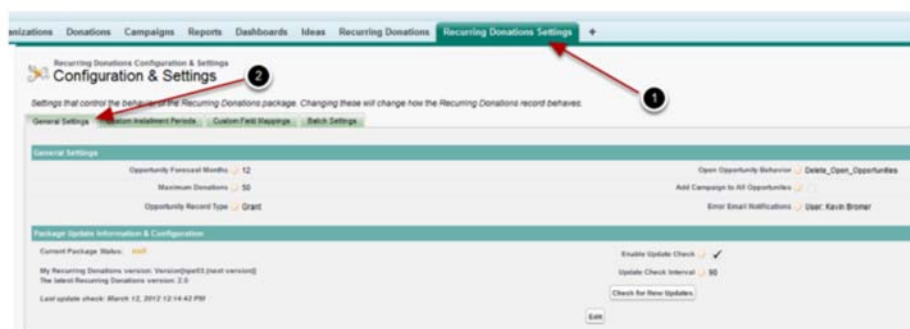
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## NPSP: Configuring & Understanding Recurring Donations

This lesson will explain the options on the 'General Settings' tab of the Recurring Donations Settings page.

### Navigate to the General Settings Tab



1. Click on the 'Recurring Donations Settings' tab.
2. Click on the 'General Settings' tab, if not already selected.

### Click 'Edit' to Edit Existing Settings



Click the 'Edit' button (visible in the previous step) to edit the existing settings.

1. **Opportunity Forecast Months:** This controls the total number of months worth of Opportunities into the future remain open for an open-ended Recurring Donation. Default is 12 months worth of open Opportunities. This value is determined based on today's date.
2. **Maximum Donations:** Total number of allowed donations for non-open-ended Recurring Donations
3. **(Opportunity) Record Type:** Sets the Opportunity record type used for any newly created Recurring Donation-related Opportunities
4. **Open Opportunity Behavior:** When a Recurring Donation is marked close, determines of the outcome of any remaining open Opportunities. Options are: None (no action is taken), Delete\_Open\_Opportunities (any Opportunities in a non-closed state for the closed Recurring Donation will be deleted) and Mark\_Opportunities\_Closed\_Lost (marks any remaining open Opportunities as closed/lost - this value can be determined via custom label)
5. **Add Campaign to All Opportunities:** If a Campaign is included with a new Recurring Donation, this setting determines if the Campaign is copied to only the first related Opportunity, or to all related Opportunities.
6. **Error Email Notifications:** Determines who, if anybody, receives email notifications when errors occur in the nightly or batch process for updating the Recurring Donations. Options include 'None', all System Administrators, any User with a System Administrator Profile, and any available Public Groups.

## Understanding Package Information & Configuration



The Package Update Information & Configuration section contains information about any available updates to your Recurring Donations 2.0 package.

1. **Current Package Status:** Tells you if a new major or minor (not patch) version of Recurring Donations is available. (Note: 'No Matching Account' can occur if you're using a sandbox or developer edition org. Or if your nonprofit org has not been registered with the Foundation for more than 24-48 hours. There is no detrimental effect to this status)
2. **Current and Latest Versions:** Tells you your current version of your Recurring Donations package in a <namespace>. <majornumber>.<minornumber> format. Recurring Donation's namespace is npe03, so version 2.0 would look like: npe03.2.0. The latest version shows you the most recent <majornumber>.<minornumber> for your package. In the example above, 2.0
3. **Last Update Check:** The date of the last time your package checked the Salesforce.com Foundation's servers for new package versions.
4. **Enable Update Check:** Enabled your package to automatically check every set number of days (determined by the Update Check Interval field) for new versions
5. **Update Check Interval:** The interval (in days) between checks if the 'Enable Update Check' box is checked. Default is 90
6. **Check for New Updates:** Initiates a check to the Salesforce server for new versions, and updates the appropriate fields

(1, 2 and 3)



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