

# NPSP: Change, Close, or Delete a Recurring Donation

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- Change a Recurring Donation
- Close a Recurring Donation
- Delete a Recurring Donation

## Change a Recurring Donation

Changing a Recurring Donation from open-ended to fixed-length or vice versa has a number of implications and pitfalls. **Salesforce.org recommends that you do not do this.** If you need to change the status/type for your Recurring Donation, close the Recurring Donation and start a new one. See the next section for more information.

When changing the Amount or the Schedule Type of a Recurring Donation, Salesforce only changes the child opportunities with stages of Prospecting or Pledged. Opportunities with stages of Posted will not be changed.

## Close a Recurring Donation

1. In the Nonprofit Success Pack, navigate to the Recurring Donation you want to close.
2. Click **Edit**.
3. Select Closed from the Status drop down menu and click **Save**.

All open child donations will be changed to a Closed Lost stage by default, or whatever you've specified in your Recurring Donations settings. Donations marked Posted remain unchanged.

Show Feed

Donations [0] | GAU Allocations [0] | Notes & Attachments [0] | Recurring Donations History [1]

### Recurring Donations Detail

Edit Delete Clone Refresh Opportunities

#### Information

Recurring Donation Name	Non Open Ended Recurring Donation	Date Established	5/20/2015
Organization		Next Donation Date	8/20/2015
Contact	John Smith	Last Donation Date	5/20/2015
Donor Name	John Smith	Installment Period	Quarterly
Amount	\$3,600.00	Installments	6
Open Ended Status	Closed	Schedule Type	Multiply By
Installment Amount	\$3,600.00	Campaign	
Total	\$21,600.00	Paid Amount	\$3,600.00
		Total Paid Installments	1

#### System Information

Created By Admin User, 5/20/2015 10:10 PM

Last Modified By Admin User, 5/21/2015 8:08 PM

Owner Admin User [Change]

Edit Delete Clone Refresh Opportunities

Action	Opportunity Name	Account Name	Close Date	Stage	Amount
Edit   Del	John Smith Donation (1 of 6) 5/20/2015	Smith Household	5/20/2015	Posted	\$3,600.00
Edit   Del	John Smith Donation (2 of 6) 8/20/2015	Smith Household	8/20/2015	Closed Lost	\$3,600.00
Edit   Del	John Smith Donation (3 of 6) 11/20/2015	Smith Household	11/20/2015	Closed Lost	\$3,600.00
Edit   Del	John Smith Donation (4 of 6) 2/20/2016	Smith Household	2/20/2016	Closed Lost	\$3,600.00
Edit   Del	John Smith Donation (5 of 6) 5/20/2016	Smith Household	5/20/2016	Closed Lost	\$3,600.00
Edit   Del	John Smith Donation (6 of 6) 8/20/2016	Smith Household	8/20/2016	Closed Lost	\$3,600.00

## Delete a Recurring Donation

You can delete a Recurring Donation, but you must delete all of the child donations first.



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