

NPSP: Create Custom Installment Periods for Recurring Donations

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Overview

Recurring Donations comes with these installment periods by default:

- Monthly
- Quarterly
- Yearly
- Weekly
- 1st and 15th

If you need additional periods, you can create them. Creating custom installment periods is a two-step process. You need to create the custom installment period in NPSP Settings, and then add the custom installment period to the actual picklist field.

You can also delete installment periods from the list of options, but Salesforce will not delete installment periods for Recurring Donations you've already created.

Create a Custom Installment Period

1. In the Nonprofit Success Pack, click the **NPSP Setting** tab.
2. Click **Recurring Donations | Recurring Donations Custom Installment Periods**.
3. Click **New Custom Installment Period**.
4. In the Name box, enter the picklist name for the custom installment period (for example, "Tri-Yearly").
5. Enter a Time Period Frequency and select a Time Period Type. For example, if you are creating a Tri-Yearly custom installment period, you would enter 4 and select Months.

NEW INSTALLMENT PERIOD

Name

The name of the new Custom Installment Period

Time Period Frequency

The amount of time the Custom Installment Period covers.

Time Period Type

The type of time period the Custom Installment Period covers.

[Create Custom Installment Period](#)

[Cancel](#)

6. When you're finished, click **Create Custom Installment Period**.

The installment period is created . . . but you're not finished. You must next add the custom installment period to your picklist field.

1. From Setup, enter **Objects** in the Quick Find box, then select Objects under the Create menu.
2. Click Recurring Donations.
3. Under Custom Fields and Relationships, click **Installment Period**.
4. Under the Picklist Values list, click **New**.

Recurring Donations Custom Field
Installment Period (Managed)

[Back to Recurring Donations](#)

This Custom Field Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)

[Validation Rules](#) (0)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#)

Field Information

Field Label	Installment Period	Object Name	Recurring Donations
Field Name	Installment_Period	Data Type	Picklist
Namespace Prefix	npe03		
API Name	npe03__Installment_Period__c		
Description	Sets the installment period for your recurring donations. WARNING: Changing the Installment Period for an existing open-ended Recurring Donation can cause open Opportunities to be deleted and recreated. Any associated data may not be retained.		
Help Text			
Created By	Admin User, 11/23/2014 10:49 AM	Modified By	Admin User, 11/23/2014 10:49 AM

Package Information

Installed Package	Recurring Donations	Available in Versions	3.0 - Current
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Picklist Options

Controlling Field [\[New\]](#)

Field Dependencies [New](#) [Field Dependencies Help](#)

No dependencies defined.

Validation Rules [New](#) [Validation Rules Help](#)

No validation rules defined.

Picklist Values [New](#) [Reorder](#) [Replace](#) [Printable View](#) [Chart Colors](#) [Picklist Values Help](#)

Action	Values	Default	Chart Colors	Modified By
Edit Del	Weekly	<input type="checkbox"/>	Assigned dynamically	Admin User, 5/21/2015 8:30 PM
Edit Del	Monthly	<input type="checkbox"/>	Assigned dynamically	Admin User, 5/21/2015 8:30 PM
Edit Del	Quarterly	<input type="checkbox"/>	Assigned dynamically	Admin User, 5/21/2015 8:30 PM
Edit Del	Yearly	<input type="checkbox"/>	Assigned dynamically	Admin User, 5/21/2015 8:30 PM
Edit Del	1st and 15th	<input type="checkbox"/>	Assigned dynamically	Admin User, 11/23/2014 10:49 AM

[Chat](#)

5. Add one or more installment periods. Each value must be on its own line.

6. Click **Save**.

7. (Optional) To have the installment periods appear in a different order, click the Reorder button and reorder the list.

Delete Custom Installment Periods

When you delete an installment period, Salesforce removes it from the installment period drop down list for new Recurring Donations going forward. Installments on all pre-existing Recurring Donations will remain intact.

1. From Setup, enter **Objects** in the Quick Find box, then select Objects under the Create menu.
2. Click Recurring Donations.
3. Under Custom Fields and Relationships, click **Installment Period**.
4. Under the Picklist Values list, click **Del** next to the Installment period you want to delete. (You'll be prompted to confirm the deletion.)



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