

# NPSP: Create a Recurring Donation

This article contains these sections:

- Create an Open-Ended Recurring Donation
- Create a Fixed-Length Recurring Donation

**NOTE:** If you haven't you should read the *Recurring Donations Overview and Setup* (/articles/Resource/NPSP-Recurring-Donations-Overview-and-Setup?

popup=false&navBack=H4sIAAAAAAAAAAluuVipWslLyzssvz0INSU\_1yM9NVdJRygaKFSSmp4ZkluSA-KVAvn58aaZ-NkyhPpCDqqs2FgCHRwp0TQAAAA) before creating a new recurring donation.

## Create an Open-Ended Recurring Donation

1. In the Nonprofit Success Pack, click the **Recurring Donations** tab. (If you don't see the Recurring Donations tab, click the plus (+) sign to view all tabs.)
2. Click **New**.



3. In the Recurring Donation Name field, enter a name for the recurring donation.
4. Enter *EITHER* the Contact name or the Organization name, but not both. You can use the lookup field to locate existing contacts and organizations in Salesforce.
5. Enter the Recurring Donation's details:
  - **Amount** - The amount for each child donation.
  - **Open Ended Status** - Select **Open**. Salesforce creates opportunities based on the Installment Period but instead of doing installments it bases the number of Opportunities on the Forecast Month setting in NPSP Settings.
  - **Date Established** – Date you opened the recurring donation.
  - **Next Donation Date** – The date on which you want the next donation to occur. This date also determines the date of all future donations. For example, if you enter 4/21/15 for the Next Donation Date, and the donation is a monthly installment, then Salesforce will create the next donation for 5/21/15, and so on.
  - **Last Donation Date** – Do Not Enter. The NPSP calculates this value automatically based on the last time a child donation was marked as Posted (i.e. it records the date of your most recent child

donation).

- **Installment Period** – How often you'll receive the donations.

**NOTE:** *Changing the installment period for an existing Open-Ended Recurring Donation may result in the loss and re-creation of open opportunities. Any data associated with those opportunities may be lost.*

- **Installments** – Do Not Enter. This option is for Fixed-Length Recurring Donations only. For Open-Ended Recurring Donations, the NPSP automatically calculates the installment number based on the Opportunity Forecast Months setting in the Recurring Donations Settings. See the Overview and Setup ([/articles/Resource/NPSP-Recurring-Donations-Overview-and-Setup?](/articles/Resource/NPSP-Recurring-Donations-Overview-and-Setup?popup=false&navBack=H4sIAAAAAAAAAAluuVipWslLyzssvz0INSU_1yM9NVdJRygaKFSSmp4ZkluSA-KVAvn58aaZ-NkyhPpCDqqs2FgCHRwp0TQAAAA)

[popup=false&navBack=H4sIAAAAAAAAAAluuVipWslLyzssvz0INSU\\_1yM9NVdJRygaKFSSmp4ZkluSA-KVAvn58aaZ-NkyhPpCDqqs2FgCHRwp0TQAAAA](/articles/Resource/NPSP-Recurring-Donations-Overview-and-Setup?popup=false&navBack=H4sIAAAAAAAAAAluuVipWslLyzssvz0INSU_1yM9NVdJRygaKFSSmp4ZkluSA-KVAvn58aaZ-NkyhPpCDqqs2FgCHRwp0TQAAAA)) for more information.

- **Schedule Type** – Do Not Enter. For Open-Ended donations, the value is always Multiply.
- **Campaign** – If you want to attach the Recurring Donation to a campaign, use the lookup field to select the campaign here. For more information on Salesforce Campaigns, see Campaigns ([https://help.salesforce.com/HTViewHelpDoc?id=campaigns\\_def.htm](https://help.salesforce.com/HTViewHelpDoc?id=campaigns_def.htm)) in Salesforce Help and Training.

**NOTE:** *If you want the campaign to be placed on all of the donation records in a Recurring Donation, use the **Add Campaign to All Opportunities** check box in the Recurring Donations Settings. See the Overview and Setup ([/articles/Resource/NPSP-Recurring-Donations-Overview-and-Setup?](/articles/Resource/NPSP-Recurring-Donations-Overview-and-Setup?popup=false&navBack=H4sIAAAAAAAAAAluuVipWslLyzssvz0INSU_1yM9NVdJRygaKFSSmp4ZkluSA-KVAvn58aaZ-NkyhPpCDqqs2FgCHRwp0TQAAAA)*

*[popup=false&navBack=H4sIAAAAAAAAAAluuVipWslLyzssvz0INSU\\_1yM9NVdJRygaKFSSmp4ZkluSA-KVAvn58aaZ-NkyhPpCDqqs2FgCHRwp0TQAAAA](/articles/Resource/NPSP-Recurring-Donations-Overview-and-Setup?popup=false&navBack=H4sIAAAAAAAAAAluuVipWslLyzssvz0INSU_1yM9NVdJRygaKFSSmp4ZkluSA-KVAvn58aaZ-NkyhPpCDqqs2FgCHRwp0TQAAAA)) for more information.*

- **Paid Amount** – Do Not Enter. The NPSP calculates this value automatically as the donations are made and marked Posted.
- **Total Paid Installments** – Do Not Enter. The NPSP calculates this value automatically as donations are made and marked Posted.

6. Click **Save**.

The NPSP creates the appropriate number of child donations, and marks each donation with a status of Pledged.

Recurring Donations  
Open Ended Recurring Donation

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed

Donations (10+) | GAU Allocations (0) | Notes & Attachments (0) | Recurring Donations History (1)

### Recurring Donations Detail

Edit Delete Clone Refresh Opportunities

Information

Recurring Donation Name	Open Ended Recurring Donation	Date Established	5/21/2015
Organization		Next Donation Date	6/21/2015
Contact	John Smith	Last Donation Date	
Donor Name	John Smith	Installment Period	Weekly
Amount	\$13.00	Installments	45
Open Ended Status	Open	Schedule Type	
Installment Amount	\$13.00	Campaign	
Total	\$0.00	Paid Amount	
		Total Paid Installments	

System Information

Created By	Admin User, 5/21/2015 7:15 PM	Last Modified By	Admin User, 5/21/2015 7:42 PM
		Owner	Admin User [Change]

Edit Delete Clone Refresh Opportunities

Donations

New Opportunity

Donations Help

Action	Opportunity Name	Account Name	Close Date	Stage	Amount
Edit   Del	John Smith Donation (1) 6/21/2015	Smith Household	6/21/2015	Pledged	\$13.00
Edit   Del	John Smith Donation (2) 6/28/2015	Smith Household	6/28/2015	Pledged	\$13.00
Edit   Del	John Smith Donation (3) 7/5/2015	Smith Household	7/5/2015	Pledged	\$13.00
Edit   Del	John Smith Donation (4) 7/12/2015	Smith Household	7/12/2015	Pledged	\$13.00
Edit   Del	John Smith Donation (5) 7/19/2015	Smith Household	7/19/2015	Pledged	\$13.00
Edit   Del	John Smith Donation (6) 7/26/2015	Smith Household	7/26/2015	Pledged	\$13.00
Edit   Del	John Smith Donation (7) 8/2/2015	Smith Household	8/2/2015	Pledged	\$13.00
Edit   Del	John Smith Donation (8) 8/9/2015	Smith Household	8/9/2015	Pledged	\$13.00
Edit   Del	John Smith Donation (9) 8/16/2015	Smith Household	8/16/2015	Pledged	\$13.00
Edit   Del	John Smith Donation (10) 8/23/2015	Smith Household	8/23/2015	Pledged	\$13.00

Show 10 more » | Go to list (45) »

Chat

As you change child donation stages from Pledged to Posted, the NPSP recalculates some of the fields described above.

Recurring Donations  
Open Ended Recurring Donation

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed

Donations (10+) | GAU Allocations (0) | Notes & Attachments (0) | Recurring Donations History (1)

### Recurring Donations Detail

Edit Delete Clone Refresh Opportunities

Information

Recurring Donation Name	Open Ended Recurring Donation	Date Established	5/21/2015
Organization		Next Donation Date	7/5/2015
Contact	John Smith	Last Donation Date	5/21/2015
Donor Name	John Smith	Installment Period	Weekly
Amount	\$13.00	Installments	45
Open Ended Status	Open	Schedule Type	
Installment Amount	\$13.00	Campaign	
Total	\$0.00	Paid Amount	\$26.00
		Total Paid Installments	2

System Information

Created By	Admin User, 5/21/2015 7:15 PM	Last Modified By	Admin User, 5/21/2015 7:44 PM
		Owner	Admin User [Change]

Edit Delete Clone Refresh Opportunities

Donations

New Opportunity

Donations Help

Action	Opportunity Name	Account Name	Close Date	Stage	Amount
Edit   Del	John Smith Donation (1) 6/21/2015	Smith Household	5/21/2015	Posted	\$13.00
Edit   Del	John Smith Donation (2) 6/28/2015	Smith Household	5/21/2015	Posted	\$13.00
Edit   Del	John Smith Donation (3) 7/5/2015	Smith Household	7/5/2015	Pledged	\$13.00
Edit   Del	John Smith Donation (4) 7/12/2015	Smith Household	7/12/2015	Pledged	\$13.00
Edit   Del	John Smith Donation (5) 7/19/2015	Smith Household	7/19/2015	Pledged	\$13.00
Edit   Del	John Smith Donation (6) 7/26/2015	Smith Household	7/26/2015	Pledged	\$13.00
Edit   Del	John Smith Donation (7) 8/2/2015	Smith Household	8/2/2015	Pledged	\$13.00
Edit   Del	John Smith Donation (8) 8/9/2015	Smith Household	8/9/2015	Pledged	\$13.00
Edit   Del	John Smith Donation (9) 8/16/2015	Smith Household	8/16/2015	Pledged	\$13.00
Edit   Del	John Smith Donation (10) 8/23/2015	Smith Household	8/23/2015	Pledged	\$13.00

Show 10 more » | Go to list (45) »

Chat

# Create a Fixed-Length Recurring Donation

1. In the Nonprofit Success Pack, click the **Recurring Donations** tab. (If you don't see the Recurring Donations tab, click the plus (+) sign to view all tabs.)
2. Click **New**.



3. In the Recurring Donation Name field, enter a name for the recurring donation.
4. Enter EITHER the Contact name or the Organization name, but not both. You can use the lookup field to locate existing contacts and organizations in Salesforce.
5. Enter the details of the recurring donation
  - **Amount** - Enter the amount for each child donation, or a total amount if you want the NPSP to divide installments up for you accordingly.
  - **Open Ended Status** - Select **None**. Salesforce creates the correct number of installments based on the Installment Period and Schedule Type you choose. New installments aren't added unless the Installments and/or Schedule Type are updated. The same behavior happens when you leave this field blank.
  - **Date Established** – Date you opened the recurring donation.
  - **Next Donation Date** – The date on which you want the next donation to occur. This date also determines the date of all future donations. For example, if you enter 4/21/15 for the Next Donation Date, and the donation is a monthly installment, then Salesforce will create the next donation for 5/21/15, and so on.
  - **Last Donation Date** – Do Not Enter. The NPSP calculates this value automatically based on the last time a child donation was marked Posted (i.e. it records the date of your most recent child donation).
  - **Installment Period** – How often you'll receive the donations.  
**NOTE:** *Changing the installment period for an existing Fixed-Length Recurring Donation may result in the loss and re-creation of open opportunities. Any data associated with those opportunities may be lost.*
  - **Installments** – Enter the number of installments (donations) you expect to receive. You can specify the maximum number of installments Recurring Donations Settings. See the Overview and Setup (/articles/Resource/NPSP-Recurring-Donations-Overview-and-Setup?popup=false&navBack=H4sIAAAAAAAAAIuuVipWslLyzssvz0INSU\_1yM9NVdJRygaKFSSmp4ZkluSA-KVAvn58aaZ-NkyhPpCDqqs2FgCHRwp0TQAAAA) for more information.
  - **Schedule Type** – Select either Multiply or Divide. The option you choose tells Salesforce how to compute the amount for each child opportunity. Let's say your donor has pledged \$100 a month for 12 months. If the number in the Amount field is \$100, select Multiply. If the number in the Amount field is \$1200, select Divide. The NPSP will calculate the donations evenly, taking into account the necessary pennies to meet the total donation amount.
  - **Campaign** – If you want to attach the Recurring Donation to a campaign, use the lookup field to select the campaign here. For more information on Salesforce Campaigns, see Campaigns ([https://help.salesforce.com/HTViewHelpDoc?id=campaigns\\_def.htm](https://help.salesforce.com/HTViewHelpDoc?id=campaigns_def.htm)) in Salesforce Help and Training.

**NOTE:** If you want the campaign to be placed on all of the donation records in a Recurring Donation, use the **Add Campaign to All Opportunities** check box in the Recurring Donations Settings. See the Overview and Setup (/articles/Resource/NPSP-Recurring-Donations-Overview-and-Setup?

popup=false&navBack=H4sIAAAAAAAAAAluuVipWslLyzssvz0INSU\_1yM9NVdJRygaKFSSmp4ZkluSA-KVAvn58aaZ-NkyhPpCDqqs2FgCHRwp0TQAAAA) for more information.

- **Paid Amount** – Do Not Enter. The NPSP calculates this value automatically as the donations are made and marked Posted.
- **Total Paid Installments** – Do Not Enter. The NPSP calculates this value automatically as donations are made and marked Posted.

6. Click **Save**.

The NPSP will create the number of child donation records (installments) and all will be marked with a status of Pledged.

The screenshot displays the 'Recurring Donations' section in Salesforce, specifically for a 'Non Open Ended Recurring Donation'. The interface includes a header with navigation links and a 'Show Feed' button. Below this, the 'Recurring Donations Detail' section provides information about the donation, including the donor name (John Smith), amount (\$3,600.00), and installment details (6 installments, quarterly). The 'System Information' section shows the creation and modification dates. At the bottom, a table lists the individual donation installments, each with a 'Pledged' status. A black arrow points to the 'Stage' column in the table, highlighting the 'Pledged' status for all installments.

Action	Opportunity Name	Account Name	Close Date	Stage	Amount
Edit   Del	John Smith Donation (1 of 6) 6/20/2015	Smith Household	5/20/2015	Pledged	\$600.00
Edit   Del	John Smith Donation (2 of 6) 9/20/2015	Smith Household	9/20/2015	Pledged	\$600.00
Edit   Del	John Smith Donation (3 of 6) 12/20/2015	Smith Household	12/20/2015	Pledged	\$600.00
Edit   Del	John Smith Donation (4 of 6) 3/20/2016	Smith Household	3/20/2016	Pledged	\$600.00
Edit   Del	John Smith Donation (5 of 6) 6/20/2016	Smith Household	6/20/2016	Pledged	\$600.00
Edit   Del	John Smith Donation (6 of 6) 9/20/2016	Smith Household	9/20/2016	Pledged	\$600.00

As you change child donation stages from Pledged to Posted, the NPSP recalculates some of the fields described above.

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	9/20/2015
Contact	John Smith	Last Donation Date	5/20/2015
Donor Name	John Smith	Installment Period	Quarterly
Amount	\$3,600.00	Installments	8
Open Ended Status	Open	Schedule Type	Multiply By
Installment Amount	\$3,600.00	Campaign	
Total	\$0.00	Paid Amount	\$600.00
		Total Paid Installments	1

System Information

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

Last Modified By Admin User, 5/20/2015 10:16 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) 6/20/2015	Smith Household	5/20/2015	Posted	\$600.00
Edit   Del	John Smith Donation (2 of 6) 9/20/2015	Smith Household	9/20/2015	Pledged	\$600.00
Edit   Del	John Smith Donation (3 of 6) 12/20/2015	Smith Household	12/20/2015	Pledged	\$600.00
Edit   Del	John Smith Donation (4 of 6) 3/20/2016	Smith Household	3/20/2016	Pledged	\$600.00
Edit   Del	John Smith Donation (5 of 6) 6/20/2016	Smith Household	6/20/2016	Pledged	\$600.00
Edit   Del	John Smith Donation (6 of 6) 9/20/2016	Smith Household	9/20/2016	Pledged	\$600.00



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