

NPSP: Map Recurring Donation Fields to Custom Opportunity Fields

You can use Recurring Donations Custom Field Mapping to copy custom fields from Recurring Donation records to child Opportunity records whenever you create a new recurring donation. You may want to do this so that details from the Recurring Donation record appear in child Opportunity records as well for easy reference or billing.

Mapping requires that you have two fields (one on the Recurring Donation and one on the Opportunity) of a matching type in order to create a mapping between them.

1. First, make sure you've created the custom field on the Recurring Donation object. For more information see [Create Custom Fields \(https://help.salesforce.com/HTViewHelpDoc?id=adding_fields.htm&language=en_US\)](https://help.salesforce.com/HTViewHelpDoc?id=adding_fields.htm&language=en_US) in Salesforce Help and Training.
2. In the Nonprofit Success Pack, click the NPSP Setting tab.
3. Click **Recurring Donations | Recurring Donations Custom Field Mappings**.
4. Click New Custom Field Mapping.
5. In the Recurring Donation Field list box select the custom field you created on the Recurring Donation object.
6. In the Opportunity Field list box, select the corresponding field on the Opportunity object.

Recurring Donations
Recurring Donation Custom Field Mappings

Map fields from Recurring Donations to Opportunities. This will copy Recurring Donation fields to the Opportunities created for the Recurring Donation.

NEW CUSTOM FIELD MAPPING

Select the Recurring Donation field to be mapped, and the Opportunity field it maps to.

Recurring Donation Field

Last Viewed Date
Recurring Donation Name
Owner ID
System Modstamp
Custom Recurring Donation Field
Amount

The Recurring Donation field to copy to the Opportunity field. Note that these fields must have the same data type.

Opportunity Field

Probability (%)
Custom Opportunity Field
Opportunity Type
Contact Id for Role
Do Not Automatically Create Payment
Member Level

The Opportunity field to receive the value from the Recurring Donation field. Note that these fields must have the same data type.

Create Custom Field Mapping Cancel

7. Click Create Custom Field Mapping.

The new field mapping appears in the Mapped Fields list.



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