

# NPSP Recurring Donations: Overview and Setup

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## Overview

The Nonprofit Success Pack's Recurring Donations feature helps you track gifts that donors have pledged over a period of time. The NPSP supports two types of Recurring Donations:

**Open-Ended Recurring Donations** are single donation amounts given over and over again, with no ending date defined. For example, John Smith gives your organization \$100/month through his work place giving campaign, and has not specified an end date for the donation. The donation will continue until you close the Recurring Donation.

**Fixed-Length Recurring Donations** are single donation amounts given over and over again, but for a defined period of time. For example John Smith has pledged to give \$50 a month for 3 years. Thus, the donation continues for three years, and ends at that point. (This type of donation is similar to a standard Salesforce Opportunity with multiple Payments attached to it. See NPSP: Recurring Donations versus Opportunity (Donation) Payments (/articles/Resource/NPSP-Recurring-Donations-versus-Opportunity-Donation-Payments?

popup=false&navBack=H4slAAAAAAAAAuuVipWslLyzssvz0INSU\_1yM9NVdJRYgaKFSSmp4ZkluSA-KVAvn58aaZ-NkyhPpCDqqs2FgCHRwp0TQAAAA) for more discussion on when to use each of these methods.)

When creating a recurring donation, you determine the type by setting the Open Ended Status.

Status	Description
None (or blank)	This value is used for Fixed-Length recurring donations. It creates the correct number of installments based on Installment Period and Schedule Type. There are no new installments added unless the number of Installments and/or Schedule Type are updated.
Open	This value is used to create Open-Ended recurring donations. It creates opportunities based on the Installment Period, but instead of creating installments it bases the number of opportunities on the Forecast Month setting in NPSP Settings.

Closed	This value stops an open-ended recurring donation from creating additional opportunities. Existing Open opportunities are handled based on the behavior specified in NPSP Settings.
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## Setup—Before You Begin

Before you begin using the NPSP's Recurring Donations feature, you'll want to understand, confirm, and possibly edit your Recurring Donation settings. The NPSP provides a set of default values, but you can change these values at any time.

**NOTE:** *If you don't have Recurring Donations installed in your Salesforce organization, you are likely using an outdated version of the Nonprofit Success Pack. You'll need to upgrade ([/articles/Resource/Install-NPSP?popup=false&navBack=H4slAAAAAAAAAAluuVipWslLyzssvz0INSU\\_1yM9NVdJRygaKFSSmp4ZkluSA-KVAvn58aaZ-NkyhPpCDqqs2FgCHRwp0TQAAAA](/articles/Resource/Install-NPSP?popup=false&navBack=H4slAAAAAAAAAAluuVipWslLyzssvz0INSU_1yM9NVdJRygaKFSSmp4ZkluSA-KVAvn58aaZ-NkyhPpCDqqs2FgCHRwp0TQAAAA)) to NPSP version 3.0 or later to install Recurring Donations functionality.*

1. In the NPSP, click the **NPSP Settings** tab.
2. Click **Recurring Donations | Recurring Donations**.
3. Click **Edit**.
4. Make changes as necessary, then click **Save**.

Here's a list of the available options:

<b>Opportunity Forecast Months</b>	Number of months' worth of open opportunities created for Open-Ended Recurring Donations. The default is 12, so after every month, Salesforce creates another month's worth of open opportunities (i.e., the total months' worth of open opportunities is always 12). If you reduce this number, Salesforce will delete any existing open opportunities beyond the number of months you've specified. If you increase this number, Salesforce will add that many months' worth of opportunities to match the number you've specified.
<b>Open Opportunity Behavior on RD Close</b>	Tells Salesforce what to do with any remaining open opportunities when you mark the status of a Recurring Donation as Closed.
<b>Maximum Donations</b>	Restricts the total number of donations (installments) for <b>Fixed-Length</b> Recurring Donations. Default is 50.
<b>Add Campaign to All Opportunities</b>	If selected, adds the campaign that you've specified for the Recurring Donation to all related (i.e. "child") opportunities. If this option is not selected, the campaign appears on the Recurring Donation's first opportunity only.

<b>Opportunity Record Type</b>	The opportunity record type assigned to the Recurring Donation's child opportunities. For more information, see Record Types ( <a href="https://help.salesforce.com/HTViewHelpDoc?id=customize_recordtype.htm&amp;language=en_US">https://help.salesforce.com/HTViewHelpDoc?id=customize_recordtype.htm&amp;language=en_US</a> ) in Salesforce Help and Training.
<b>Disable Scheduling of Nightly Job</b>	Prevents the scheduling of the nightly update to Recurring Donations. You'll need to remove any existing scheduled jobs through <b>Setup   Monitoring   Scheduled Jobs</b> .

## Create Opportunity Stage Picklist Values

The NPSP's Recurring Donations feature uses two Opportunity stages in particular to keep track of donations: **Pledged** and **Closed Lost**. The Pledged stage is unique to the NPSP.

If you downloaded a trial instance of the NPSP directly from Salesforce.org, you will already have these picklist values in place for all of your child donation records.

If you manually installed the NPSP on top of Salesforce Enterprise Edition, you may not have one or both of these picklist values in place. If that's the case, you'll need to manually add them to your picklist values in order for Recurring Donations to work. See the Salesforce Knowledge Base ([https://help.salesforce.com/HTViewSolution?id=000004277&language=en\\_US](https://help.salesforce.com/HTViewSolution?id=000004277&language=en_US)) for more information on adding new Opportunity picklist values.

## Recurring Donations and Payment Processor Integration

If you use an integrated payment processor, it may be tracking recurring donations separately. Be aware of this, as you don't want to create duplicate opportunities by tracking those same recurring donations in Salesforce.

If your payment processor is not integrated, track donations by creating a Recurring Donation that matches the information from the integrated payment processor—mapping the data as closely as possible.



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