Enhanced Recurring Donations Upgrade Guide

salesforce.org

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Why Enhanced Recurring Donations?

Recurring donations are a dependable source of revenue for nonprofits, as donors who give regularly are extremely important. They tend to continue giving for many years, and sometimes increase the amounts they give. When donors want to adjust how and when they give in response to changes in their lives, for example, if they want to pause or reschedule donations due to an unplanned event, you must be able to respond quickly and accurately.

The Recurring Donations feature has existed in Nonprofit Success Pack (NPSP) for many years. In an effort to improve your experience when using it, and in partnership with our nonprofit user community, the Salesforce.org fundraising team embarked on a mission to reimagine Recurring Donations. Here's what you told us would make it better.

- More intuitive field labels, scheduling, and clarity between the different types of Recurring Donations.

- More predictable behaviors when changing Recurring Donation records. It should be very clear when NPSP inserts, updates, or deletes related Opportunities.

- A simple way to update an existing Recurring Donation when donors want to change the amount they give, the date when they donate, or other schedule details. Updating a Recurring Donation while leaving existing Opportunities in place improves reporting and makes it possible to view recurring gifts in a single cohesive picture.

- Create only the installment Opportunity for the next donation date instead of many records for future installments.

- A more durable code base that uses modern coding standards.

> **Note**
> In this guide, we refer to the old Recurring Donations feature as "Legacy Recurring Donations" and the newly revised feature as "Enhanced Recurring Donations".

Summary of Enhanced Recurring Donations Functionality

Enhanced Recurring Donations:

- Uses the same Recurring Donations object already in NPSP.

- Provides an in-app tool for upgrading to Enhanced Recurring Donations, including migrating your data to the new data model.

- Creates only one future, pledged Opportunity at a time per Recurring Donation. This Opportunity represents the next donation installment.

- Supports both open-ended and fixed-length Recurring Donations.

- Supports mapping field data from the Recurring Donation to related installment Opportunities.

- Makes it easier to change an existing Recurring Donation without requiring that you close or delete any records.

- Displays information about upcoming installment Opportunities and the active Recurring Donation schedule in two Lightning components.

- Integrates with Salesforce.org Elevate online fundraising platform.

What About Legacy Recurring Donations?

Legacy Recurring Donations refers to the old Recurring Donations feature in NPSP. Once you upgrade, the Legacy Recurring Donations processing logic is replaced with the Enhanced Recurring Donations logic.

Q: What if I want to keep using Legacy Recurring Donations?

A: If you want to keep using Legacy Recurring Donations, don't upgrade to Enhanced Recurring Donations.

Q: What if I want to revert back to Legacy Recurring Donations at some point?

A: NPSP doesn't provide a way to switch back to Legacy Recurring Donations. Make sure that you're fully informed and ready to upgrade before you make the switch!

Q: Will Salesforce.org still support Legacy Recurring Donations?

A: Yes! Legacy Recurring Donations isn't going anywhere and still exists in NPSP, should you decide not to upgrade. That said, we aren't planning to develop any new features for Legacy Recurring Donations—all new development will focus on Enhanced Recurring Donations.

Upgrade to Enhanced Recurring Donations

Because Legacy Recurring Donations already exists in NPSP, you need to perform several upgrade tasks and move your existing data to the Enhanced Recurring Donations model.

We've outlined the required tasks for you. **Take your time and complete all of them.**

Summary of Steps

> ⚠️ **Important**
> Don't leave the upgrade partially complete! After you begin, plan to move through all the upgrade tasks to completion. Give yourself plenty of time as the process can take a while to finish.

1. **Test in a sandbox first**—To fully understand the upgrade process and the new functionality in Enhanced Recurring Donations, *we strongly recommend* that you test in a sandbox before upgrading your production org. You have these choices of sandboxes to test with:

    a. **Developer Sandbox**—We recommend that you populate a Developer sandbox with at least some data from your production org. That way, you get a more realistic test of the upgrade process.

    b. **Full Sandbox**—A Full sandbox is the best environment to test the upgrade process with because a Full sandbox contains a copy of all your production data.

    > 📝 **Note**
    > We don't recommend using a Partial Copy sandbox. Only a sampling of data from your production org gets copied into the Partial Copy sandbox. The data sample is random and might be missing important data relationships (such as the lookup to Campaign). This can cause errors during upgrade and complicate the testing process.

2. **Database Preparation Tasks**—To limit potential errors and to protect your data, complete these tasks to prepare your sandbox or production org for upgrade.

3. **Validate Migration**–NPSP simulates migrating your existing data to the Enhanced Recurring Donations model and identifies errors.

4. **Resolve Errors**–If Validate Migration finds errors, resolve them before you continue.

5. **Enable Enhanced Recurring Donations**–This step replaces the Recurring Donations processing logic with Enhanced Recurring Donations. Recurring Donations won't function the same way once you enable Enhanced Recurring Donations.

> ⚠️ **CAUTION**
> NPSP doesn't provide a way to revert to Legacy Recurring Donations. Be sure that you're ready to enable Enhanced Recurring Donations!

6. **Deploy Metadata**–Use MetaDeploy to install new metadata for Enhanced Recurring Donations. MetaDeploy changes Recurring Donation:

    a. Page layouts

    b. Field labels

    c. Field level security for the System Administrator and Standard user profiles

    d. Picklist values

    e. Help text

7. **Migrate Data**–Migrate your existing Recurring Donations data to the Enhanced Recurring Donations data model.

> 📝 **Note**
> For details on how MetaDeploy and data migration affects your org, read the Appendix.

8. **Post-Upgrade Tasks**–Finish up with a few tasks before using Enhanced Recurring Donations.

Database Preparation Tasks

To prepare for upgrade:

1. Enable Lightning Experience.

2. Enable and Deploy My Domain.

3. Enable Customizable Rollups.

4. Assign these Apex classes to the user profile you'll use during the upgrade:

   a. npsp.RD2_EnablementDelegate_CTRL

   b. npsp.UTIL_BatchJobProgress_CTRL

   c. npsp.RD2_StatusMappingSettings_CTRL

   d. npsp.RD2_VisualizeScheduleController

   > **Note**
   > If you don't see these Apex classes, Enable the Enhanced Profile User Interface.

5. Disable your custom workflows, processes, validation rules, and triggers on the Recurring Donation, Opportunity, and Payment objects. This step is necessary to prevent errors during data migration. You don't need to disable NPSP workflows, triggers, etc.

6. Locate Legacy Recurring Donations that are connected to a Household Account and not a Contact. Remove the Household Account and enter a Contact from the same Household Account. After data migration, these Recurring Donations will be connected to both the original Household Account and Contact.

7. Stop creating or editing Recurring Donations during the upgrade process. You might need to temporarily suspend:

   a. User access to Recurring Donations (except for System Administrators)

   b. Donation or payment processing integrations

   c. Data import processes

8. Wait until legacy Recurring Donation batch jobs have completed. Go to **Setup** > **Apex Jobs** and look for `RD_RecurringDonations_BATCH`.

9. Back up your database, including all Recurring Donations and their related records. *You can skip this step if you're testing in a sandbox*.

10. (Optional) Enable Field History Tracking for Recurring Donations. Field History Tracking allows you to track and report on field changes that occur during the data migration step.

11. Decide what to do with open Opportunities during data migration. Enhanced Recurring Donations use just one future Opportunity at a time. In NPSP Settings, under Recurring Donations, select a value in the Open Opportunity Behavior on RD Close setting (other

than No_Action). The data migration will preserve the next open Opportunity in your Recurring Donation schedule and apply your chosen behavior to the rest.

Recurring Donation records with more than 100 Open or future Opportunities can't be migrated. To run the Enhanced Recurring Donations data migration process, close or delete some of the Open Opportunities on the Recurring Donation.

12. During the data migration step, NPSP converts Custom Installment Periods to the Enhanced Recurring Donations format. If you're using Custom Installment Periods, check to make sure that the Time Period Frequency is 20 or less. See Changes During Migration for more information.

> ⚠️ **Important**
> If you're using or intend to use 3rd party applications that integrate with the Recurring Donations, Opportunities, or Payments objects (such as for online donations), please check with the vendor about compatibility with Enhanced Recurring Donations before upgrading.

> 📝 **Note**
> Some aspects of Enhanced Recurring Donations may not function in Lightning Console.

Validate Migration

To ensure that your migration runs error free, validate your data before you migrate it. If you run into any errors during the test migration, fix them before you convert to the Enhanced Recurring Donations data model.

1. Go to **NPSP Settings**.
2. Click **Recurring Donations** > **Upgrade to Enhanced Recurring Donations**.

3. Click **Validate Migration**.

> **Note**
> Processing a large number of records takes some time. If you'd like, you can leave the page and return later to check the progress.

① Validate Migration

NPSP simulates migrating your existing data to the Enhanced Recurring Donations model and identifies errors. If there are errors, go to NPSP Settings | System Tools | Error Log. After you fix the errors, return here and validate the migration again. Once the validation completes without errors, you can proceed to the next step.

The validation process may take some time to complete. You can leave this page and return later to check the progress.

Validate Migration

4. After validation completes, you can view the results.

Validate Migration   100% Complete

Status:	Complete	**Success**
Time Elapsed:	00:06:00	
Completed:	Jan 08, 2020, 10:26 AM	
Total Batches:	20	
Batches Processed:	20	
Total Records:	500	
Records Processed:	500	
Records Failed:	0	

If you see the green Success message, proceed to the next upgrade step.

If there are errors, resolve them before you continue. After you fix the errors, return to the upgrade page in NPSP Settings and validate the migration again.

If you need help with the errors, see Resolve Migration Errors, or post in the Nonprofit Success Pack group.

Resolve Migration Errors

During Validate Migration, you might encounter errors. Not to worry! NPSP provides an easy way to locate the records that caused the errors.

You'll know you have errors if the Validate Migration results look like this:

In this example, we see 3 `Records Failed` and a yellow Error message. The `Complete with Errors` Status means that the validation process finished processing all records and detected at least one error.

To view the errors:

1. Refresh your browser to ensure all error logs appear.

2. Go to **NPSP Settings** > **System Tools** > **Error Log**.

3. Find the most recent error messages.

In this example, a validation rule caused the errors. Someone in this org decided that all Recurring Donations must have a related Campaign, but didn't make sure that all the existing Recurring Donations had Campaigns before they activated the validation rule.

To fix the errors, you have some options.

*   **Copy and paste** each Record URL in your browser to open the records, then add a Campaign to each Recurring Donation. This option is good if there are only a few records to fix.

*   **Run a report** of Recurring Donations with a blank Campaign. Export the results to a spreadsheet, and add a Campaign Id for each row. Using Data Loader or a similar tool, update the records. This option is good if you have a lot of records to fix.

- **Deactivate the validation rule**. This option is good if you no longer need the validation rule.

This error is just one example of the types of errors you might encounter. Depending on the specifics of your org, the steps required to fix the errors might vary.

After you fix all the errors, return to the Enhanced Recurring Donations upgrade page in NPSP Settings and validate the migration again. When validation completes without errors, proceed to the next upgrade step.

Resolve Error: "You must select a Contact associated with this Household Account"

1. Locate Legacy Recurring Donations that are connected to a Household Account and not a Contact.

2. Remove the Household Account and enter a Contact from the same Household Account.

3. After data migration, these Recurring Donations will be connected to both the original Household Account and Contact.

Resolve Error: "Installment Frequency is required. Enter a value between 1 and 20".

1. Go to **NPSP Settings** > **Recurring Donations** > **Recurring Donation Custom Installment Periods**.

2. Delete any Custom Installment Periods that have a Time Period Frequency greater than 20.

3. Create a new Custom Installment Period with the **same name** as the one you deleted.

4. Set the Time Period Frequency and Time Period Type such that they equal the Custom Installment Period you deleted, but with Time Period Frequency between 1 and 20. For example, if your old Custom Installment Period had a Frequency of 26 and a Period Type of Weeks, your new Custom Installment Period should have a Frequency of 6 and a Period Type of Months. The result being "twice per year" in both cases.

Enable Enhanced Recurring Donations

> **Note**
> NPSP doesn't provide a way to revert back to Legacy Recurring Donations. Be sure that you're ready to enable Enhanced Recurring Donations!

After you complete the preparation tasks and have validated your existing data with a test migration, you're ready to enable Enhanced Recurring Donations. Enabling this setting changes the processing logic for Recurring Donations to use Enhanced Recurring Donations logic.

1. Go to **NPSP Settings** > **Recurring Donations** > **Upgrade to Enhanced Recurring Donations**.

2. Confirm that you have completed the preparation and validation tasks (1).

3. Enable Enhanced Recurring Donations (2).

That's all you need to do for this step. In the next step, you'll deploy metadata updates to your organization.
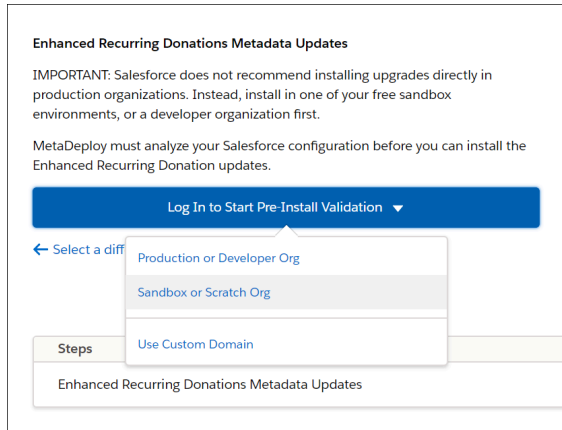
Deploy Metadata

Enhanced Recurring Donations uses the existing Recurring Donation object plus some additional elements. To install those elements, use our external MetaDeploy service.

1. Go to **NPSP Settings** > **Recurring Donations** > **Upgrade to Enhanced Recurring Donations**.

2. Click **Launch MetaDeploy**. MetaDeploy is an external service and opens in a new browser tab. When you're done with MetaDeploy, close it and return to your Salesforce org to complete the upgrade process.

3. Click **Log In to Start Pre-Install Validation**, then choose whether you're installing in a Production or Sandbox org.

4. Provide your Salesforce login credentials and click **Log In**.

> 📝 **Note**
>
> For Sandbox login, remember to include the name of the Sandbox at the end of your username. For example, username@company.org.mySandbox.

5. When prompted, **Allow** access.

6. Wait for the Pre-Install Validation to finish.

7. Click **Install**.

8. Read the Product Terms of Use and Licenses. Select the confirmation checkbox then click **Confirm**.

9. Wait for the installation to finish.

10. Close MetaDeploy and return to your Salesforce org.

11. Confirm that you've installed the Enhanced Recurring Donations metadata.

> **Note**
> For a complete list of the MetaDeploy changes, read MetaDeploy Updates in the Appendix.

Now you're ready to migrate your existing Recurring Donations data to Enhanced Recurring Donations.

Migrate Data

Now that you've enabled Enhanced Recurring Donations and deployed the supporting metadata, it's time to migrate your existing data to Enhanced Recurring Donations.

> **Important**
> The data migration tool significantly changes your existing data. Read Changes During Data Migration in the Appendix for a complete list of what's changed. Also, be sure to review **Open Opportunity Behavior on RD Close** in NPSP Settings. That setting determines how the migration tool handles future open Opportunities.

1. Go to **NPSP Settings** > **Recurring Donations** > **Upgrade to Enhanced Recurring Donations**.

2. If any changes occurred in your org after you enabled Enhanced Recurring Donations, click **Validate Migration** to check for errors.

3. After validation, click **Ready to Migrate**, or click **Skip Validation** if you chose not
    to validate. Then click **Run Migration**. The data migration may take some time to
    complete, depending on how many Recurring Donation records are in your database.

> ### Note
> You can stop the migration by clicking **Stop Migration**. However, any changes
> to your data to that point have already been committed and can't be rolled
> back. When you restart the migration process, the process resumes where it
> left off. Until you complete the migration, some of your data will be in the old
> model and some in the new model. If you've stopped a migration, you should
> complete it as soon as possible.

4. When the migration process completes, you can view the details. If the Status is
    `Complete`, you're all done! If the Status is `Complete with Errors`, see Resolve
    Migration Errors.

> ### Note
> If you have a very large volume of Recurring Donation records to migrate to the
> Enhanced Recurring Donation model, you might want to disable rollups before
> you run the data migration.

Post Upgrade Tasks

Once you migrate your data, the upgrade process is complete. However, before your
organization starts using Enhanced Recurring Donations, review these steps and complete
the ones that apply to your org:

1. Turn on workflows, processes, validation rules, and triggers that you disabled prior to conversion.

2. Assign the Enhanced Recurring Donations page layout to your custom profiles. Add any custom fields you have to the new layout.

3. Remove the old Recurring Donations page layout from all profiles.

4. Remove unused (deprecated) fields from the Recurring Donation related lists on Account, Contact, and Campaign page layouts.

5. Verify that Automatic Recurring Donations Naming is enabled in custom settings.

6. Assign the NPSP Recurring Donation Lightning record page as the Org Default.

7. Assign the `npsp.RD2_VisualizeScheduleController`, `npsp.RD2_EntryFormController` and `npsp.RD2_PauseForm_CTRL` Apex classes to your custom profiles.

8. Assign Read, Create and Edit permissions on the Recurring Donations object to your custom profiles or permission sets.

9. Adjust visibility of Recurring Donations fields on your custom profiles or permission sets. See Adjust Field-Level Security for Recurring Donations.

10. Adjust Recurring Donations reports to work with the Enhanced Recurring Donations data model. For a list of data model changes, see the Appendix.

11. The New Open Recurring Donation action on the Contact object doesn't include the correct fields to work with Enhanced Recurring Donations. Remove this action or create your own that includes the correct fields.

12. Add the picklist value `Paused` to the Status field on the Recurring Donation object. This value is required for the pause functionality.

13. Adjust donation processing integrations and data import templates to match the Enhanced Recurring Donations data model.

14. When you upgrade to Enhanced Recurring Donations, the Payment Method value from new Recurring Donations gets copied to the Payment record related to each installment Opportunity. However, existing Payment records will not have a value. You may wish to populate your existing Payments records with a Payment Method using the Data Loader or similar tool.

15. Educate your staff about the new Recurring Donations functionality.

Adjust Field-Level Security for Recurring Donations

Enable these recommended field-level security settings for Recurring Donations on your user profiles.

Recurring Donations

For users who manage Recurring Donation records, grant access to these Recurring Donations fields:

Field Label	Field Name	Security Setting
Account	npe03__Organization__c	Edit Access
Always use last day of month	npsp__Always_Use_Last_Day_Of_Month__c	No Access
Amount	npe03__Amount__c	Edit Access
Campaign	npe03__Recurring_Donation_Campaign__c	Edit Access
Change Type	npsp__ChangeType__c	Edit Access
Contact	npe03__Contact__c	Edit Access
Current Year Value	npsp__CurrentYearValue__c	Read Access
Date Established	npe03__Date_Established__c	Edit Access
Day of Month	npsp__Day_of_Month__c	Edit Access
Donor Name	npe03__Donor_Name__c	Read Access
Effective Date	npsp__StartDate__c	Edit Access
Installment Amount	npe03__Installment_Amount__c	No Access
Installment Frequency	npsp__InstallmentFrequency__c	Edit Access
Installment Period	npe03__Installment_Period__c	Edit Access
Last Donation Date	npe03__Last_Payment_Date__c	Read Access
Next Donation Date	npe03__Next_Payment_Date__c	Read Access
Next Year Value	npsp__NextYearValue__c	Read Access
Number of Paid Installments	npe03__Total_Paid_Installments__c	Read Access
Number of Planned Installments	npe03__Installments__c	Edit Access
Open Ended Status	npe03__Open_Ended_Status__c	No Access
Payment Method	npsp__PaymentMethod__c	Edit Access
Recurring Donation Name	Name	Edit Access
Recurring Type	npsp__RecurringType__c	Edit Access
Schedule Type	npe03__Schedule_Type__c	No Access
Status	npsp__Status__c	Edit Access
Status Reason	npsp__ClosedReason__c	Edit Access
Total	npe03__Total__c	No Access
Total Paid Amount	npe03__Paid_Amount__c	Read Access

Learn more about managing Recurring Donations in Create a Recurring Donation.

Recurring Donations Change Logs

For users who track Recurring Donation changes over time, grant access to these Recurring Donation Change Log fields:

Fields Label	Field Name	Security Access
Amount	npe03__Amount__c	Read Access
Campaign	npe03__Recurring_Donation_Campaign__c	Read Access
Installment Frequency	npsp__InstallmentFrequency__c	Read Access
Installment Period	npe03__Installment_Period__c	Read Access
Number of Planned Installments	npe03__Installment__c	Read Access
Payment Method	npsp__PaymentMethod__c	Read Access
Recurring Type	npsp__RecurringType__c	Read Access
Status	npsp__Status__c	Read Access

Learn more about Recurring Donation Change Logs in Track Upgrades, Downgrades, and Other Recurring Giving Changes.

Accounts and Contacts

To allow users to report on recurring donor status at the Account and Contact level, grant access to these fields:

Object	Field Label	Field Name	Security Setting
Account	Sustainer	npsp__Sustainer__c	Read Access
Contact	Sustainer	npsp__Sustainer__c	Read Access

After granting access to these fields, add them to the Account and Contact page layouts.

Learn more about Sustainer fields in Track Recurring Donor Status.

Appendix

Disable Rollups during Data Validation or Data Migration

If you have a very large volume of Recurring Donation records to migrate to the Enhanced Recurring Donation model, you might want to disable rollups before you validate or run the data migration.

1. In Setup, enter `Custom Settings` in Quick Find and push enter.
2. Click **Custom Settings**.
3. Click **Manage** next to Recurring Donations Settings.
4. Click **Edit**.
5. Select **Disable CRLP When Creating Installments**.
6. Click **Save**.

Now your rollups calculate in a nightly batch instead of at the same time you run the validate or migration process.

When you have completed the upgrade to Enhanced Recurring Donations, return to Custom Settings and deselect Disable CRLP When Creating Installments.

> **Note**
> What is a "large volume" of records in Salesforce? 100,000? 500,000? There's no precise definition. As a general rule, if your organization stores over one million records, and certainly several million, then your organization is probably a large data volume org.

MetaDeploy Updates

MetaDeploy makes these changes to your Salesforce instance.

- **New Enhanced Recurring Donations Page Layout**

  - This new layout is assigned as the default layout for the System Administrator and Standard User profiles. You should assign this layout to all your custom profiles.

  - The layout is specific to Enhanced Recurring Donations. All deprecated fields have been removed from this layout.

- **Updated NPSP Recurring Donations Lightning Record Page**

  - The new page includes Lightning components that display a list of upcoming installments and a list of the active schedules on the Recurring Donation.

- **New Recurring Donation Record Entry and Edit Interface**

  - MetaDeploy overrides the standard New and Edit buttons to use the `npsp:Rd2_EntryForm` Lightning component on the Recurring Donations object.

- **Help Text Changes**

  - npsp__StartDate__c

    - Old: (null)

    - New: The date that new or updated schedule information (Amount, Day of Month, etc.) for this Recurring Donation takes effect. The default is the current date.

  - npsp__Day_of_Month__c

    - Old: Sets future monthly, custom monthly, or quarterly donation installments to the selected day of the month, regardless of Next Donation Date. NOTE: If the Always use last day of month checkbox is selected, it supersedes the Day of Month value.

    - New: Sets the specific day of the month for future installment Opportunities when the Installment Period is Monthly. If you select 29 or 30, the installment date will be the last day of the month for months that don't have that many days.

  - npe03__Installment_Period__c

    - Old: 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.

- – New: Defines the installment schedule of this Recurring Donation along with Installment Frequency. For example, if Installment Period is Monthly and Installment Frequency is 3, the schedule is defined as "every 3 months."

- – npe03__Next_Payment_Date__c

  - – Old: The date on which you want the next donation to occur. This date also determines the date of all future donations.

  - – New: Calculated automatically using the active Recurring Schedule(s). Read only. Note that the calculation in Enhanced Recurring Donations uses a trigger and Apex code. Legacy Recurring Donations used a rollup.

- – npe03_Amount__c

  - – Old: (null)

  - – New: The amount for each installment Opportunity.

- – npe03_Date_Established__c

  - – Old: (null)

  - – New: The initial inception date for this Recurring Donation. The default is the current date.

- – npe03__Last_Payment_Date__c

  - – Old: Do Not Enter. NPSP calculates this value automatically based on the last time a child donation was marked Posted.

  - – New: NPSP calculates this value automatically based on the last time an installment Opportunity was marked paid (read only).

- – npe03__Paid_Amount__c

  - – Old: Do Not Enter. NPSP calculates this value automatically as donations are made and marked Posted.

  - – New: The total amount paid on this Recurring Donation. Calculated automatically as the total amount of all Closed/Won installment Opportunities (read only).

- – npe03__Total_Paid_Installments__c

  - – Old: Do Not Enter. NPSP calculates this value automatically as donations are made and marked Posted.

  - – New: Total number of installment Opportunities paid on this Recurring Donation (read only).

- npsp__CurrentYearValue__c

    - Old: (null)

    - New: This Recurring Donation's total amount for the current calendar or fiscal year (read only). Includes Closed Won Opportunities plus future installments for the rest of the year.

- npsp__NextYearValue__c

    - Old: (null)

    - New: This Recurring Donation's total expected amount for the next calendar or fiscal year (read only).

- **Picklist Value Changes**

    - npsp__Day_of_Month__c

        - New: "Last Day of Month"

        - Inactivated: "29", "30", "31"

    - npe03__Installment_Period__c

        - New: (nothing new)

        - Inactivated: "Quarterly"

- **Field Label Changes**–"Deprecated" is appended to these field labels:

    - npe03__Installment_Amount__c

    - npe03__Open_Ended_Status__c

    - npe03__Schedule_Type__c

    - npe03__Total__c

    - npsp__Always_Use_Last_Day_Of_Month__c

- **Field-Level Security Changes**–These existing fields are all changed to Read Only for the System Administrator and Standard User profiles:

  - npe03__Paid_Amount__c

  - npe03__Total_Paid_Installments__c

  - npe03__Installment_Amount__c

  - npe03__Open_Ended_Status__c

  - npe03__Schedule_Type__c

  - npe03__Total__c

  - npsp__Always_Use_Last_Day_Of_Month__c

  - npsp__CurrentYearValue__c

  - npsp__NextYearValue__c

- **Field-Level Security Changes**–These new fields are set to Editable for the System Administrator and Standard User profiles:

  - npsp__ClosedReason__c

  - npsp__Day_of_Month__c

  - npsp__DisableFirstInstallment__c

  - npsp__EndDate__c

  - npe03__Installments__c

  - npsp__InstallmentFrequency__c

  - npsp__PaymentMethod__c

  - npsp__RecurringType__c

  - npsp__StartDate__c

  - npsp__Status__c

- **Apex Class Access Changes**–Access to these new Apex classes is granted to the System Administrator and Standard User profiles:

  - npsp__RD2_EntryFormController

  - npsp__RD2_PauseForm_CTRL

  - npsp__RD2_StatusMappingSettings_CTRL

  - npsp__RD2_VisualizeScheduleController

  - npsp__UTIL_BatchJobProgress_CTRL

Changes During Data Migration

NPSP makes the following changes during the data migration step of the Enhanced Recurring Donations upgrade.

Recurring Donations Custom Settings

The migration process copies the value of the custom label `npe03.RecurringDonationStageName` to a new custom setting, `npsp__InstallmentOppStageName__c`.

Custom Installment Periods

Custom Installment Periods are configured in **NPSP Settings** > **Recurring Donations** > **Recurring Donation Custom Installment Periods**. The migration process converts Custom Installment Periods to Recurring Donation field data.

Custom Installment Period Field	Recurring Donation Field	Data Migration Details
Time Period Frequency	Installment Frequency	Time Period Frequency must be between 1 and 20 otherwise the data migration process will report an error.
Time Period Type	Installment Period	Days converts to Daily. Weeks converts to Weekly. Months converts to Monthly. Years converts to Yearly.

Recurring Donation Object

The migration process makes these changes to the Recurring Donation object.

Field Label	Field Name	Data Migration Details
Account	npe03__Organization__c	*No change to data.*
Always Use Last Day of Month	npsp__Always_Use_Last_Day_Of_Month__c	*No change to data.*

Field Label	Field Name	Data Migration Details
Amount	npe03__Amount__c	For Recurring Donations where Open Ended Status = None and Schedule Type = Divide By or is null, the Amount is changed to the value in Installment Amount. For example, a Recurring Donation Amount of $2400 where there are 12 planned installments results in an Amount of $200 ($2400 / 12 = $200). Otherwise, the Amount remains unchanged.
Campaign	npe03__Recurring_Donation_Campaign__c	*No change to data.*
Closed Reason	npsp__ClosedReason__c	*No change to data.*
Contact	npe03__Contact__c	*No change to data.*
Current Year Value	npsp__CurrentYearValue__c	All Recurring Donations are set to 0. The value for this field is then recalculated during a nightly batch.
Date Established	npe03__Date_Established__c	*No change to data.*
Day of Month	npsp__Day_of_Month__c	If Always Use Last Day Of Month is selected, or the Day Of Month field value is 29, 30, or 31, then the value in this field will be "Last Day of Month." Otherwise, the value is unchanged.
Donor Name	npe03__Donor_Name__c	*No change to data.*
Effective Date	npsp__StartDate__c	Effective Date is changed to the date of the earliest Opportunity (based on Close Date). If there are no Opportunities, then Date Established is used.
Installment Amount	npe03__Installment_Amount__c	*No change to data.*

Field Label	Field Name	Data Migration Details
Installment Frequency	npsp__InstallmentFrequency__c	If the Installment Period is "Quarterly," Installment Frequency is set to 3. If the Installment Period is any other value, Installment Frequency is set to 1. If the Installment Frequency is a Custom Installment Period, Installment Frequency is copied from Time Period Frequency.
Installment Period	npe03__Installment_Period__c	If the Installment Period is "Quarterly," then the Installment Period is set to "Monthly." All other values are left as is. If the Installment Period is a Custom Installment Period, the value is copied from Time Period Type.
Last Donation Date	npe03__Last_Payment_Date__c	*No change to data.*
Next Donation Date	npe03__Next_Payment_Date__c	*No change to data.*
Next Year Value	npsp__NextYearValue__c	All Recurring Donations are set to 0. The value for this field is then recalculated during a nightly batch.
Number of Paid Installments	npe03__Total_Paid_Installments__c	*No change to data.*
Number of Planned Installments	npe03__Installments__c	When Open Ended Status is "Open", Number of Planned Installments is updated to null. Otherwise, the original value for Number of Planned Installments remains unchanged.
Open Ended Status	npe03__Open_Ended_Status__c	*No change to data.*
Payment Method	npsp__PaymentMethod__c	*No change to data.*
Recurring Type	npsp__RecurringType__c	When Open Ended Status is "Open", Recurring Type is updated to "Open". When Open Ended Status is "None" or is null, Recurring Type is updated to "Fixed".

Field Label	Field Name	Data Migration Details
Status	npsp__Status__c	If the Open Ended Status field value is "Closed," then Status is updated to "Closed." Otherwise, Status is updated to "Active."
Schedule Type	npe03__Schedule_Type__c	*No change to data.*
Total	npe03__Total__c	*No change to data.*
Total Paid Amount	npe03__Paid_Amount__c	*No change to data.*

Opportunity Object

The migration process makes these changes to Opportunity records related to Recurring Donations.

Where the parent Recurring Donation's Open Ended Status is "Open":

- The next open installment Opportunity in the Recurring Donation schedule remains unchanged.

- All closed Opportunities remain unchanged.

- All additional, open Opportunities are updated based on the value of Open Opportunity Behavior on RD Close in NPSP Settings. The choices in that setting are:

  - Update the Stage to Closed Lost

  - Delete the Opportunities

> **Note**
> Enhanced Recurring Donations doesn't support more than one future open Opportunity, so you can't select "No_Action" in the Open Opportunity Behavior setting. You must choose one of the other options.

Where the parent Recurring Donation's Open Ended Status is "None" or is null:

- All Opportunities, regardless of Stage, remain unchanged.