

Recurring Plans - Technical Details

Some technical details related to recurring plans and donations:

Interval Details

Next interval charges occur within 24 hours of the initial charge as applied to the next interval. In the event that the present month does not contain the day of the initial charge (e.g, the initial charge was January 31 and now it's February), the charge will occur on the last day of the month. Similarly, if a plan was created on February 29 of a leap year, the charge will recur on the 29th of each month, with the exception of February during non-leap years, for which it will charge on February 28. Charge times follow Pacific time. After a clock change, the plan will charge according to the time (PDT/PST) of the initial plan creation.

Auto Responders

Recurring plans will trigger various auto responders to be sent in different points of the process. These include:

- **Recurring Donation Plan Confirmation:** Sent to donor when they create a recurring donation plan or when one is created on their behalf by an administrator.
- **Recurring Donation Plan Ended Notification:** Sent to donor when their recurring plan is ended by the donor or an administrator.
- **Recurring Donation Plan Modified Notification:** Sent to donor when their recurring plan is modified via ending the current plan and creating a new one in its place.
- **Recurring Donation Plan Suspended Notification:** Sent to donor when their recurring plan is paused by the donor or an administrator.
- **Recurring Donation Plan Reactivated Notification:** Sent to donor when their recurring plan is reactivated by the donor or an administrator.
- **Recurring Donation Instance Confirmation:** Sent to donor when a recurring donation plan processes a donation.
- **Recurring Donation Instance Failed:** Sent to donor when a recurring donation plan fails to process a donation.

Failures

If a charge fails, it is attempted once more in close succession. If both charges fail, the Recurring Plan enters a "Retrying" status. In this status, the plan will try to run a charge again for the next three intervals. If any succeed, the plan is returned to the Active status. If all three retries fail, the plan enters the Failed status and ceases charging. For each failed charge, an email notification is sent to the donor (Recurring Donation Instance Failed) and administrator. The processor error code and message are accessible in Recurring Donation reports.

The number of successive attempts within an interval and the number of interval retries before failing are both configurable for individual organizations. To configure a different number than the default described above, please contact us.

Statuses

Possible statuses for recurring plans and what they are:

- **Active:** plan is processing donations correctly.
- **Suspended:** plan is not processing donations due to being paused by an administrator or donor. It can be resumed to continue processing donations.
- **Retrying:** plan has failed to process a donation but will try to process again at the next interval. If successful, plan will be marked Active again. If four consecutive intervals fail, the plan will be marked as Failed.
- **Failed:** plan has failed processing a donation in four interval tries. Contact Rallybound support to resolve.
- **Ended:** plan has been ended and will no longer process donations.
- **Pending:** plan is being created. If a plan is in this state for any period of time, there was some failure in creating the plan. Contact Rallybound support to resolve.

Expiring Cards

Both donors and administrators can self-troubleshoot charge failures. Once a charge fails, the plan will enter a "Retrying" status. Either the donor or the administrator can update the payment method associated with the plan. When the next interval charge comes, the plan will attempt a new charge. If the charge succeeds, the plan will enter the "Active" state once again.

Permissions

The following are the permission levels for recurring access:

- **Delete:** End, delete, modify plan
- **Edit:** Create new, edit details/recipient, pause, reactivate
- **View:** View plans
- **None:** No access to Recurring Donations tab

Activity Stream

Recurring plan activity is posted to the [Activity Stream](#). Included activities are:

- Create
- Pause
- Resume
- End
- Modify
- Failed
- Change recipient