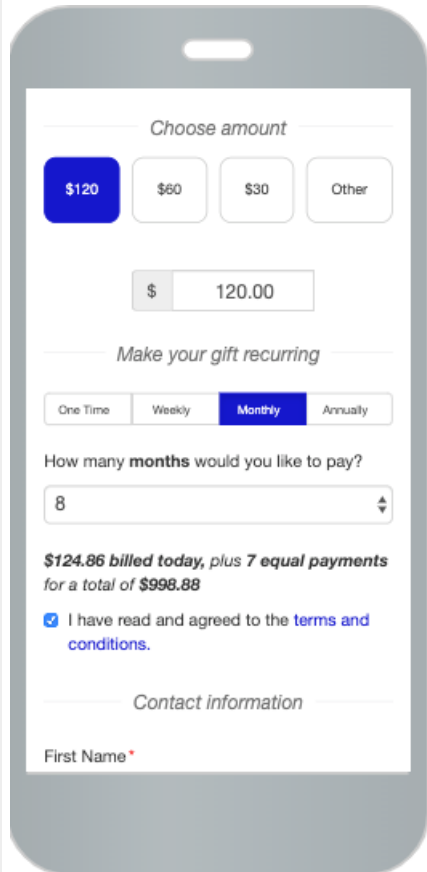


Manage Recurring Donations

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This article defines and describes what you can and cannot modify on a Recurring Donation.

A screenshot of a mobile application interface for managing recurring donations. The screen is divided into three main sections. The top section, titled "Choose amount", features four buttons: "\$120" (highlighted in blue), "\$60", "\$30", and "Other". Below these is a text input field showing "\$ 120.00". The middle section, titled "Make your gift recurring", has four frequency buttons: "One Time", "Weekly", "Monthly" (highlighted in blue), and "Annually". Below the frequency buttons is a question "How many months would you like to pay?" followed by a dropdown menu showing the number "8". Below the dropdown, it states "\$124.86 billed today, plus 7 equal payments for a total of \$998.88". There is a checkbox with a blue checkmark and the text "I have read and agreed to the terms and conditions." The bottom section, titled "Contact information", has a label "First Name" with a red asterisk indicating a required field.

For security reasons, GiveSmart Fundraise Support Staff and Non-Profit Organizations cannot change or modify certain parts of an active Recurring Donation.

What **CANNOT** be changed:

- Frequency
- Email Address/Phone Number

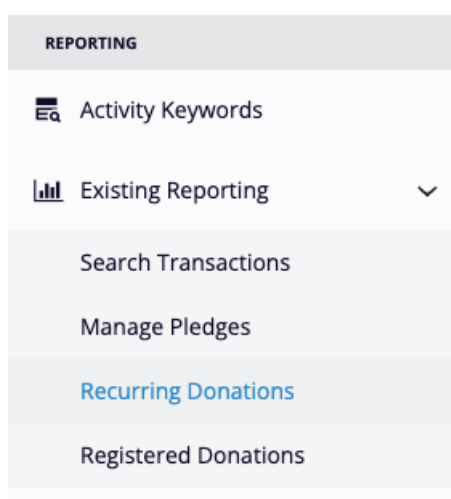
If you need to change any of the above, you can cancel the Recurring Donation, and start a new one with the new frequency, email address, etc.

What **CAN** be changed:

- Credit Card Number
- Next Bill Date
- Amount
- Number of Payments
- Notifications

Recurring Donations

To modify a Recurring Donation, from the left navigation select **Existing Reporting > Recurring Donations**.



Search for the Donation you want to manage. For more on filtering and viewing Recurring Donations, [click here](#).

The Recurring Donation specific search criteria include the status:

Status

Active	Cancelled	Error	Completed
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- **Active:** A Recurring Donation in good standing
- **Canceled:** A recurring donation that has been stopped in its cycle, either by the donor or by you, the organization, or by the GiveSmart Fundraise Support team.
- **Error:** A recurring donation that was not able to process the donation at the scheduled recurring time. This may be caused by such things as an expired card, a credit card over its limit, etc.
- **Completed:** For those Recurring Donations set with either a Fixed Term or Pay Over Time setting, this will show those that have ended. For more information on the Recurring Payment Types, [click here](#).

For more information about how and when the recurring donation is processed and what messages are sent, read [this article](#).

Filter your list of recurring donors by name, donation date, campaign, keyword, and/or phone number.

When you have found the correct donor, click on the **Action menu** to the far right of their information and choose what you would like to manage on the donation.

Recurring Donations

Type

All Fundraising Crowdfunding



Status

Active Cancelled Error Completed

[Export](#)

First Name Last Name Start Date End Date Campaign Keyword

Phone Number [Search](#) [Clear](#)

Name	Frequency	Next Billing Date	First Billing Date	Transactions Completed	Amount	Phone	Total given this year	Total remaining this year	Type	Status	Action
	Monthly	03/03/2021 17:42	02/03/2021 17:42	0	\$25.00		\$0.00	\$250.00	Fundraising	Active	...

Type	Status	Action
Fundraising	Active	...

- [Update Credit Card](#)
- [Manage Payments](#)
- [Text to Update](#)
- [Cancel Recurring](#)

Note: While any GiveSmart Fundraise user account can use the **Update Credit Card** and **Text to Update** features, only an Admin or a User with the Finance option enabled can use Manage Payments or Cancel Recurring. To enable the Finance Option, review your [User Account Settings here](#).

Update Credit Card

When you click on Update Credit Card, it will take you to a screen that has the donor's information already filled out, but where you can enter new credit card information for the recurring donation.

Donation Amount: \$25.64

Frequency: Yearly

Please update your credit card info here.

Card Number *

XXXX XXXX XXXX XXXX



Expiration Date *

MM / YY

CVV * What is this?

eg. 123

[Save](#)

Text to Update

You can send your donor a text with a link where they can update their information themselves. It will show a warning message before you send the text.

The text message will read:

Your credit card ending in 3232 expired. To continue your recurring donation for [Organization Short Name] please update your CC info here [link, like in the Update Credit Card section above]

Manage Payments

When you click on Manage Payments a window opens allowing you to change several items within the Recurring Donation.

×

Manage Payments

Scott Couchman | \$25.00 | Monthly | 0 transactions completed

Payment Amount

\$

25.0

Number of Payments

No Limit ▾

Next Bill Date

3/03/2021

Notifications:

Payment Receipt	<input checked="" type="checkbox"/> SMS	<input checked="" type="checkbox"/> Email
Upcoming Payment Reminder	<input checked="" type="checkbox"/> SMS	<input checked="" type="checkbox"/> Email
Credit Card expires in 30 days	<input checked="" type="checkbox"/> SMS	<input checked="" type="checkbox"/> Email
Credit Card expired	<input checked="" type="checkbox"/> SMS	<input checked="" type="checkbox"/> Email

Cancel

Save

Payment Amount: If you have cultivated your donor into increasing their donation (or if they entered an incorrect amount, etc,) you can change the amount of their recurring donation without needing to cancel the current donation and having them create a new one. This makes upgrading their recurring donation simple and seamless.

Number of Payments: Where the donor can choose to donate for a number of months or years, you can change that number here (anywhere from 2 donations to 60), or switch it to No Limit, or ongoing donations.

Next Bill Date: If a donor wishes their donation would be charged on a different date from when they made their donation, you can change it to their preferred date.

Notification: This information is copied in from the [Receipts and Notifications section](#) when you design your donation form. If the donor would like a change, such as only receiving texts or emails, not both, you can adjust their notifications here.

Cancel Recurring

You can cancel this donor's recurring donation. It will show a warning message before you cancel the recurring donation. Confirm to complete the cancellation.

Note: This is not a refunding process, it only cancels *future* donations from occurring. This will only stop the "recurring" portion of a donation, meaning, if a donation has already been charged, this process will NOT refund that charge, it only cancels any further donations.

To refund a donation, please follow the procedures as listed in the article: [How do I refund a donation?](#)