

## How does a donor set up a recurring donation?

 Knowledge Base  Last Updated: 2018/04/12

[DONATIONS](#)

### Set Up Scheduled Giving

Donors can create a recurring donation through the “Scheduled Giving” tab (1) on the left-hand side of the donor portal. Remember: the donor will need to have created an account in order for this option to be active. Donors will be able to choose a specific Fund (2) and set up a giving schedule (frequency, amount, start date, etc). Your donors will have the option to choose an end date for their recurring gift if you have enabled the Installments field. Installments can be enabled within the Settings section of the Control Panel. Click here for more information regarding giving portal settings. Next, they will enter their payment information at the bottom of the screen. The last step is to click [Activate Schedule] (3) to submit their recurring donation.

### Reviewing Scheduled Giving

After an automatic donation schedule has been setup donors can view the details anytime under the “Scheduled Giving” tab (1). When a donor has more than one schedule established each schedule is listed as a link across the top of the page (2). To view any of the additional schedules just click the Schedule’s link.

Give Now  
» One Time Donations

**1**  
Scheduled Giving  
» Automatic Recurring Donations

My Account  
» My Info, Pledge & History

**2** My Scheduled Giving



Choose a Fund:

Additional Comments:

Frequency:

Amount:

Installments:  « how many donations?

Start Date:

### Card Information

Card Type:

Card Number:

Card Expiration:  /  (month / year)

### Card Holder Information

Name on Card:

Street Address:

Postal Code:

Add 2.5% to help cover costs of processing?

**3** [Activate Schedule](#) 



## Change/Delete a Recurring Gift

To delete a recurring gift click the “Scheduled Giving” (1). If there are multiple schedules in place, you will need to click the specific Schedule (2) you need to cancel. Once you have the desired Scheduled selected click [Delete Schedule] (3) to cancel the schedule.

John Doe

Log Out 

## Give Now

» One Time Donations

1

## Scheduled Giving

» Automatic Recurring Donations

## My Account

» My Info, Pledge &amp; History

2

» [Schedule 1](#) [Schedule 2](#) [Schedule 3](#)My Scheduled Giving - **Active**

Designation: General Budget  
Frequency: Monthly  
Amount: \$250.00  
Start Date: 9/1/2016

## Card Information



Card Number: xxxx-1111  
Card Expiration: 1 / 2021

## Card Holder Information

Name on Card: John Doe  
Street Address: 1234 5th Ave.  
Postal Code: 55555

[Delete Schedule](#)[Click here](#) to add an additional schedule.

**NOTE:** If you would like to make changes to an existing Schedule (ie: updated payment information, change the gift amount, etc.) you will first need to delete the schedule and then invite the donor to create a new schedule reflecting those changes.

John Doe

Log Out 

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1

## Scheduled Giving

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» [Schedule 1](#) [Schedule 2](#) [Schedule 3](#)My Scheduled Giving - **Active**

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