

# Donor Dashboard Guide

*\*You can access your personal Donor Dashboard via any of your organization's fundraising pages or via the "Welcome to Your Donor Dashboard" email sent to you after you first created your account.*

## UPDATE ACCOUNT INFORMATION

You can quickly & easily edit these elements of your donor profile:

1. Name
2. Privacy Setting
3. Phone Number
4. Address
5. Text Messages ON/OFF
6. Birthday
7. Gender
8. Employer
9. Job Title

## HOW TO

1. Log into your personal Donor Dashboard
2. Select the person icon in the upper right-hand corner
3. Select "My Profile"
4. Edit the section you want to change
5. Select "Save Changes"

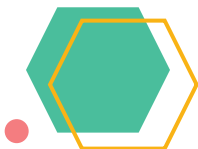
## STOP A MONTHLY DONATION

1. Log in to your personal Donor Dashboard
2. Select the person icon in the upper right-hand corner
3. Select "Monthly Gifts" from the drop-down menu
4. Identify your monthly subscription & select the 3 dots to the right of it
5. Select "Cancel Donation"

## ADD A PAYMENT METHOD

1. Log in to your personal Donor Dashboard
2. Select the person icon in the upper right-hand corner
3. Select "Payment Methods" from the drop-down menu
4. Select "Add Payment"
5. Enter your new credit/debit card information & select "Add Card"

*Note: You can also remove your current payment method/delete your current card information on file by selecting the trash can icon next to the card you want to remove here.*



## VIEW & PRINT GIVING RECEIPTS

1. Log into your personal Donor Dashboard
2. Choose the person icon in the upper right-hand corner
3. Select "Donation History"
4. Select "View Receipt"
5. Select "Print This Receipt"

## INCREASE MONTHLY DONATION

### Option 1

Delete current subscription & create new subscription for increased amount

#### Part 1

1. Log in to your personal Donor Dashboard
2. Select the person icon in the upper right-hand corner
3. Select "Monthly Gifts" from the drop-down menu
4. Identify your monthly subscription & select the 3 dots to the right of it
5. Select "Cancel Donation"

#### Part 2

1. Log into your Donor Dashboard
2. Select the person icon from the upper right-hand corner
3. Select "Monthly Gifts"
4. Under the section titled "Monthly Donations", set your donation amount - the new, full donation amount you'd like to give
5. Select "Give Monthly"
6. Confirm your payment source (card on file or other), cover fee, whether/not to leave note or make gift in honor/memory
7. Select "Give"

### Option 2

Add additional subscription for difference in amount.

1. Log into your Donor Dashboard
2. Select the person icon from the upper right-hand corner
3. Select "Monthly Gifts"
4. Under the section titled "Monthly Donations", set your donation amount - the difference between what you're currently giving and what you want to give (ex: If you're currently giving \$25, but want to give \$65, set \$40 as your new donation)
5. Select campaign to support (if any)
6. Select "Give Monthly"
7. Confirm your payment source (card on file or other), cover fee, whether/not to leave note or make gift in honor/memory
8. Select "Give"



### STOP ROUND-UP DONATION

1. Log in to your personal Donor Dashboard
2. Select the person icon in the upper right-hand corner
3. Select "Round-Ups" from the drop-down menu
4. Select "Settings"
5. Select "Remove"
6. Check "Yes, I confirm this action"
7. Select "Remove Round-Ups"

### CHANGE ROUND-UP DONATION MAX CAP

1. Log in to your personal Donor Dashboard
2. Select the person icon in the upper right-hand corner
3. Select "Round-Ups" from the drop-down menu
4. Select "Settings"
5. Drag & release the arrow scroll bar underneath "Monthly Cap"  
*\*Note: The lowest cap is \$10*
6. Select "Save Changes"

### QUESTIONS ABOUT YOUR ACCOUNT?

Please visit our [Help Desk & Live Chat](#)

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