

# Manage Recurring Donations

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

## Editing Recurring Donations

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
- Donation Amount
- Number of Payments
- Enabling/Disabling Email or SMS 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:

- **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.

**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.

## 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.

**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?](#)