

Manage your GiveSmart Account

Last Modified on 05/20/2022 3:22 pm EDT

Note: Available to Org admins only.

Manage your GiveSmart subscription from the **Account** page, which shows agreement dates, subscription start and end dates, subscription status, and a link to view the agreement. When it's time to renew reach out to your Customer Success Manager.

Locate

1. Go to [Org Hub](#) > [Account](#).

The screenshot displays the 'Account' page in GiveSmart. At the top right, there is a yellow 'Renew Subscription' button. Below this is a table with two columns: 'DATE SIGNED' and 'DETAILS'. The table contains three rows of subscription data, each with a 'View Agreement' button. To the right of the table is a sidebar with sections for 'ACCOUNT INQUIRIES', 'CREDIT CARD PROCESSING', 'Account Details', 'Additional Information', and 'Resources'. The 'Account Details' section shows 'Card Processor: CardConnect', 'MID: 4963172688', and 'Status: Active'. The 'Additional Information' section includes fields for 'Legal Name' (Community Brands Inc) and 'Financial Signer' (Community Brands Client Inactive MD). The 'Resources' section lists various forms like 'Bank Change Form' and 'Financial Signer Change Form'. A 'Help' button is located at the bottom left of the page.

DATE SIGNED	DETAILS
Pending	Subscription: 01-10-2019 to 01-09-2022 View Agreement
12-10-2018	Subscription: 01-10-2018 to 01-09-2019 View Agreement
	Subscription: ending on 01-09-2018

Review your GiveSmart agreements

See a list of all past, current, and pending GiveSmart Agreements. Subscription date ranges are listed, along with links to review agreements.

Note: Agreements signed before the release of subscription will reflect as **On File** with a subscription end date, which indicated the end date of your most recent agreement.

Renew your subscription

When your subscription is within 30 days of expiring, a banner will appear on both the admin and event pages of a campaign for anyone with an Org, Campaign, Campaign Assistant or Volunteer admin role. Click **Renew Subscriptions** to send your Customer Success Manager an email to discuss renewal and the service options.

Add additional staff or equipment

Send a request to add staff or equipment to an existing Campaign under contract. Click the blue [Contact your Customer Success Manager](#) to email your Customer Success Manager.

Manage your credit card processing

The **Account Details** section includes the CardConnect merchant account number and your MID status.

View additional information provided on the original merchant application, Legal Name, Commonly Known As, and Financial Signer.

Note: The information provided on the original merchant application may be requested when submitting a change to your merchant account.

The Resource section includes downloadable forms required when making requests for merchant account changes related to bank change, legal name change, financial signer change, and DBA Name change. Visit [Changing your Merchant Account Information](#) to review steps to complete and submit.

Subscription expired

Thirty days prior to your subscription ending, a banner will appear at the top of the campaign event and admin pages for org and campaign admins to be notified and then reach out to their Customer Success Manager.

When your subscription expires, anyone with an Org, Campaign, Campaign Assistant, or Volunteer admin role will be sent to the subscription expired page. Click **Contact Us** to email your Customer Success Manager to renew.

Admins with access to multiple organizations can still access campaigns or hubs for those not expired, but accessing an expired org will send them to the subscription expired page.



Time to renew!

Your GiveSmart subscription has expired. Please contact your account manager or support at 855-322-4483 and we'll get you back up and running!

[Contact us to renew](#)

GiveSmart
by communitybrands

Note: The user experience remains the same. Users can access the campaign page to manage their accounts based on the campaign settings.
