Managing Completed Recurring Transactions

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Note: Available to Org admins only.

Review all completed recurring donations. Sort by date, donor name, origin (campaign where initial donation is located), donation amount, and status. Download as a CSV report. Visit the Recurring Transaction report to review merchant account funding details from bath reports containing recurring donations only.

Locate

1. Go to **Org Hub** > **Transactions.**
2. Click **Completed.**
3. Select a transaction to open the details.
   - Review the donor's contact information, origin, amount, frequency, and schedule date.
     - To edit details, visit the origin campaign.
   - Remove a card from a scheduled recurring transaction.
   - Add a card for a scheduled recurring transaction.
   - See all credit card activity.

Manage

Choose to edit or cancel any completed transactions. The **Reports** page includes all recurring transaction details for the admin to manage. Visit Reports to learn more.

Note: An email is sent when transactions are processed and includes successful and unsuccessful transactions and cards that expire in 30 days. The donor's username, phone number, and email are included.

Locate actions

1. Select a transaction to open the details.
2. Click **Actions.**
3. Choose **Edit Scheduler** or **Cancel Transaction.**

Edit scheduler

Adjust scheduled and all future transactions.

1. Select a transaction to open the details.
2. Click **Actions** > **Edit Scheduler.**
3. Adjust the **Amount.**
4. When you've finished, click **Save**.

Cancel transaction

Cancel all future transactions.

1. Select a transaction to open the details.
2. Click **Actions** > **Cancel Transaction.**
3. Click **Cancel Transaction.**