Managing Recurring Transactions

This guide details how to manage and cancel recurring payments within the GiveSmart Events Org Hub.

> **Note:** Available to Org Admins only.

Navigate to the **Org Hub** > **Transactions**
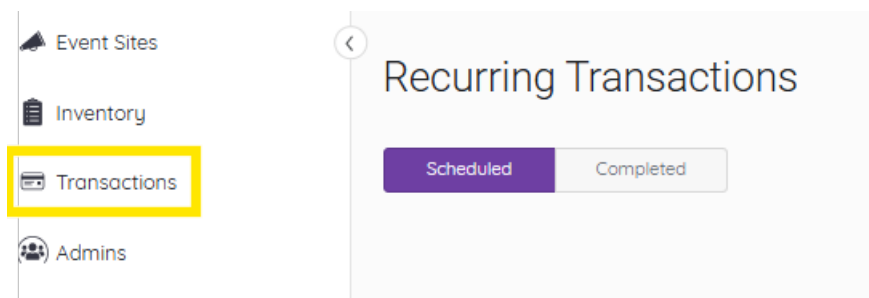
From here, you will see a list of upcoming recurring transactions that includes the scheduled date, name, origin (Event/Campaign Site), Amount, and Frequency. Columns can be sorted by selecting the column header.
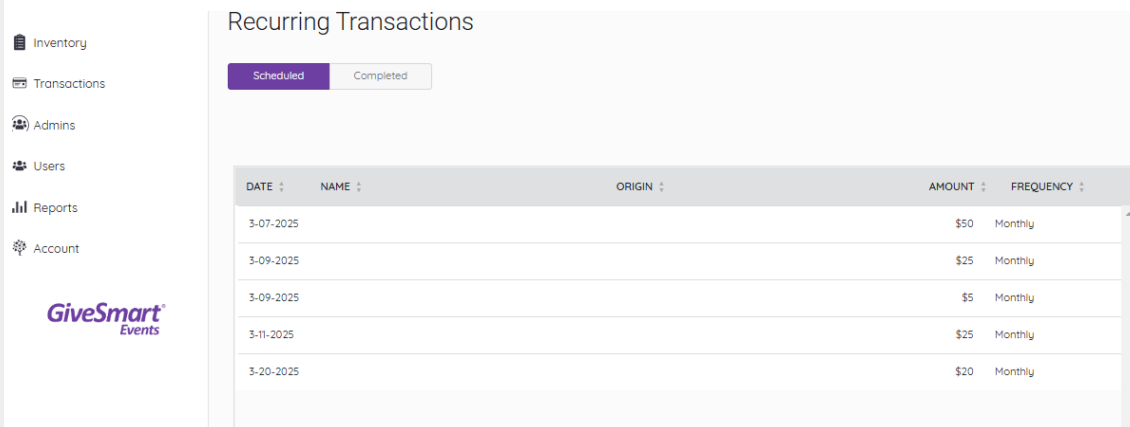
Remove and Update a Card On File

Select a transaction to open the Transaction Detail on the right-hand side. From the here, you can select Remove to remove the current Card on File and replace it with a new one if needed.

Amount	$50
Frequency	Monthly
Scheduled Date	3-07-2025

Credit Card

Card on File   💳 VISA   Exp: 07/25   Remove

Once the card is removed, select Add Card On File.

Credit Card
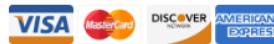
Card on File   Add Card On File

If the user currently has a Card on File within an Event Site, it will be available to select. Otherwise, select **Pay with New Card** to add a new Card on File.

Add a Card on File

Select an existing card on file or add a new one.

○   💳 VISA   Exp: 08/25

◉   Pay with New Card

VISA   MasterCard   DISCOVER   AMERICAN EXPRESS

Card Number Visa, MC, Disc, Amex

[   ]

| **Expiration** | | **Security Code** |
| MM | YYYY | 3 or 4 digits |

Adjust the Recurring Transaction Amount

Navigate to the **Org Hub > Transactions**

🔊 Event Sites

📋 Inventory

💳 Transactions

👥 Admins
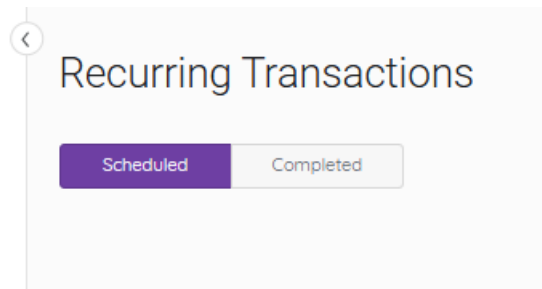
Recurring Transactions

[Scheduled] [Completed]

Select a transaction to open up the Transaction Detail pane on the right-hand side. Select Actions
> **Edit Scheduler**

Adjust the **Amount > Save**. The new amount will apply to the next scheduled payment and all future payments.

Note: The **Frequency** and **Day of Transaction** cannot be adjusted. If either of those need to be updated, the recurring payment should be cancelled and a new recurring payment initiated.

Cancel a Recurring Transaction

Navigate to the **Org Hub > Transactions**

Select a transaction to open up the Transaction Detail pane on the right-hand side. Select Actions > **Cancel Transaction** to cancel the scheduled payment and all future payments.

A confirmation modal will confirm if you'd like to cancel the payment and all future payments for the selected donor.

Cancel Transaction

Are you sure you want to cancel this and all future transactions

No, keep   Cancel Transaction

Additional Options

Select **Completed** to view or export a report of all Completed recurring transactions.

Recurring Transactions

Scheduled   Completed

This report can be sorted by column, where the **Status** will return a status of Approved, Declined, or Cancelled.

Select any transaction to open up the Transaction Detail pane on the right-hand side.

DATE	NAME	ORIGIN	AMOUNT	STATUS

For **Cancelled** Transactions, the Transaction Detail pane will note the user who cancelled the transaction.

Credit Card

Card on File   VISA   Exp: 11/25   Remove

! **Transaction Cancelled**
This scheduled transaction was cancelled on 10-18-2023 by ▮▮▮▮▮▮▮▮ No further transactions will be processed.

For **Declined** Transactions, the Transaction Detail pane will note the date of the transaction attempt(s) made. From here, you may opt to select Remove to update the Card on File as needed.

Credit Card

Card on File   VISA   Exp: 06/24   Remove

Activity   ! 2-09-2025 / declined
                  VISA   Exp: 06/24

               ! 2-10-2025 / declined
                  VISA   Exp: 06/24

For **Approved** Transactions, the Transaction Detail pane will note the approval date and Transaction ID #.

Credit Card

| Card on File | VISA | Exp: 09/27 | Remove |

Activity ✅ 1-20-2025 / approved
VISA   Exp: 09/27
Trans ID #

Note: Donors who elect to cover processing fees on recurring donations will cover the credit card fee for the initial donation. All subsequent recurring processing fees will be covered by the organization.