Managing Scheduled Recurring Transactions

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Note: Available to Org admins only.

Review all scheduled donations. Sort by date, donor name, origin (campaign initial donation was made), donation amount, and frequency. Download as a CSV report.

Locate

1. Go to **Org Hub** > **Transactions.**
2. Click **Scheduled**.
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.

Note: Select an existing card attached to the user's account within the origin campaign or enter a new card.

Manage

Choose to edit or cancel any scheduled transactions.

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 scheduled and all future transactions.

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