

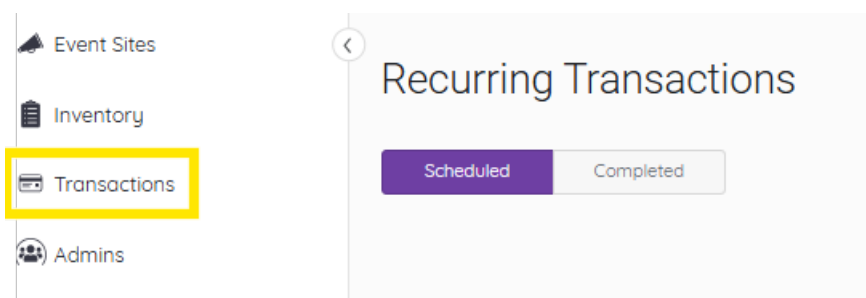
Managing Recurring Transactions

Last Modified on 03/10/2025 12:39 pm EDT

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.

The screenshot shows the 'Recurring Transactions' table with the following columns: DATE, NAME, ORIGIN, AMOUNT, and FREQUENCY. The table contains five rows of data. The 'Scheduled' filter is active.

DATE	NAME	ORIGIN	AMOUNT	FREQUENCY
3-07-2025			\$50	Monthly
3-09-2025			\$25	Monthly
3-09-2025			\$5	Monthly
3-11-2025			\$25	Monthly
3-20-2025			\$20	Monthly

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



Card Number Visa, MC, Disc, Amex

Expiration


Security Code

Adjust the Recurring Transaction Amount

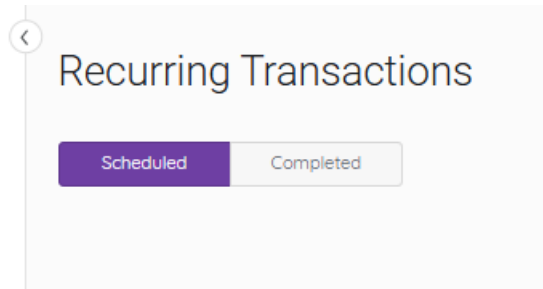
Navigate to the **Org Hub > Transactions**

 Event Sites

 Inventory

 Transactions

 Admins



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

Actions ▾

Edit Scheduler

Cancel Transaction

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

AMOUNT

50

FREQUENCY

Monthly

DAY OF TRANSACTION

31st of the Month

Cancel

Save

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**

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 > **Cancel Transaction** to cancel the scheduled payment and all future payments.

Actions ▾

Edit Scheduler

Cancel Transaction

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
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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 [REDACTED] 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 #