



THE ORCHARD

Instructions for Changing Recurring Gifts

Logging into Your Giving Account

1. Go to [The Orchard Give Page](#).
2. Click on “Your Account” at the top right corner of the page, and a drop down box will appear that reads “Manage Account”

The screenshot shows the 'The Orchard Give' interface. At the top, there's a header with 'Español' and 'Your Account' with a user icon. Below the header, the main content area displays 'The Orchard Give' with a large '\$ 0.00' amount. A dropdown menu is open, showing 'Welcome to Your Account' and 'Your Account is where you can view transactions, update your payment method or manage recurring gifts.' Below this, a 'Manage Account >' link is highlighted with a red circle. In the foreground, a gift form is visible with a warning 'Please enter an amount'. The form includes fields for 'Gift type' (Give one time / Set up recurring), 'Frequency' (Every week / Every 2 weeks / Every month / 1st & 15th monthly), 'Starting' (Jul 29, 2024 (Today)), and 'Fund' (Choose Fund). A 'Next' button is at the bottom of the form.

3. Click on “Manage Account” and sign into your account with a phone number or email address associated with your giving account.

The screenshot shows the 'Sign in' page. The title is 'Sign in'. Below the title, there's a message: 'Sign in to your personal account using your mobile number. ⓘ'. Below this, there's a link: 'Sign in via email and password >'. The main form area is titled 'Mobile' and contains a field for a mobile number with a dropdown for the country (US) and a text input containing '(201) 555-5555'. Below the form, there's a 'Next' button and a link: 'Don't have an account?'.

4. For security purposes, you may be required to enter a verification code sent as a text to your phone number or an email to your email address. Please check your spam if this may be your first time receiving an email.

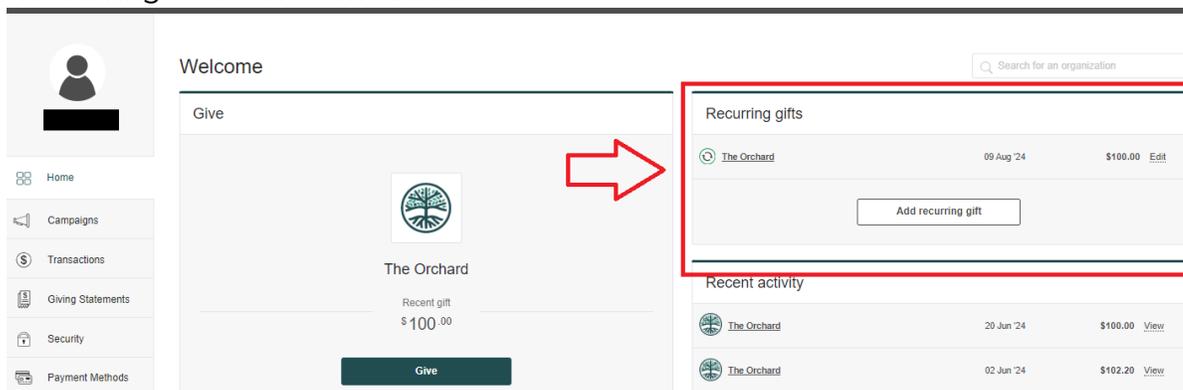
The screenshot shows a 'Sign in' page with a light blue header. Below the header, there is a white box containing the text 'Enter the security code sent to your number [REDACTED] (Resend code)'. Below this text is a link that says '< Change mobile number'. The main content area has a light grey background and contains the label 'Security Code' above a text input field. The input field has a placeholder text 'digit code' and a small lock icon on the right. Below the input field is a link that says 'Can't receive text messages?'. At the bottom of the page is a white box with a rounded 'Sign in' button.

5. You should now arrive at the Donor Portal Welcome page.

Find your Recurring and Scheduled Gift(s)

The first step to any of the ways to update your recurring or scheduled gifts is to find them in the Donor Portal.

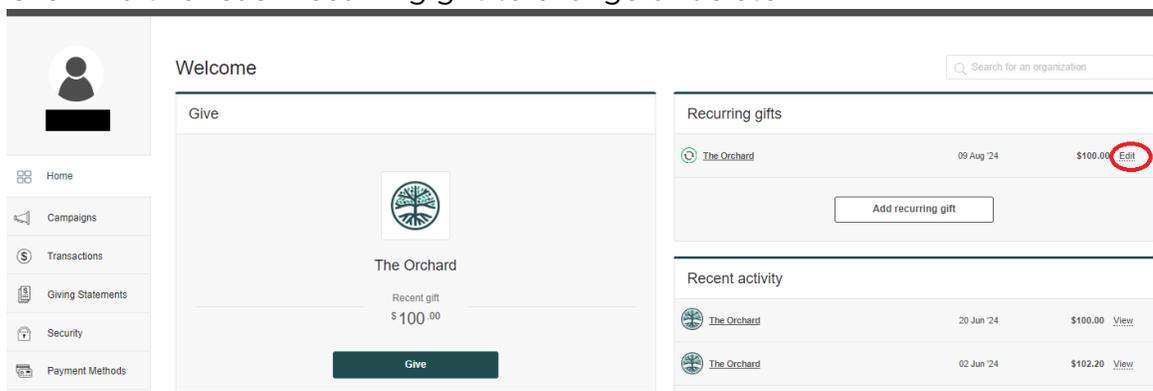
1. Log into your [Donor Portal](#) as instructed above.
2. Once arriving at the Donor Portal Welcome page, look for the section titled "Recurring Gifts" or "Scheduled Gifts."



The screenshot shows the Donor Portal interface. On the left is a navigation menu with options: Home, Campaigns, Transactions, Giving Statements, Security, and Payment Methods. The main content area is titled 'Welcome' and features a 'Give' button and a 'Recent gift' of \$100.00 from 'The Orchard'. On the right, there is a 'Recurring gifts' section, which is highlighted with a red box. This section contains a table with one entry for 'The Orchard' with a date of '09 Aug '24' and an amount of '\$100.00'. An 'Edit' link is visible next to the amount. Below the table is an 'Add recurring gift' button. Further down is a 'Recent activity' section with two entries for 'The Orchard'.

Organization	Date	Amount	Action
The Orchard	09 Aug '24	\$100.00	Edit

3. Select the gift you'd like to update. It will be labeled with the name of the organization (The Orchard), the gift amount, and the next scheduled payment date. **Note: you may see other organizations if you have recurring gifts to other organizations using PushPay as their giving platform.**
4. Click "Edit" of each recurring gift to change or delete

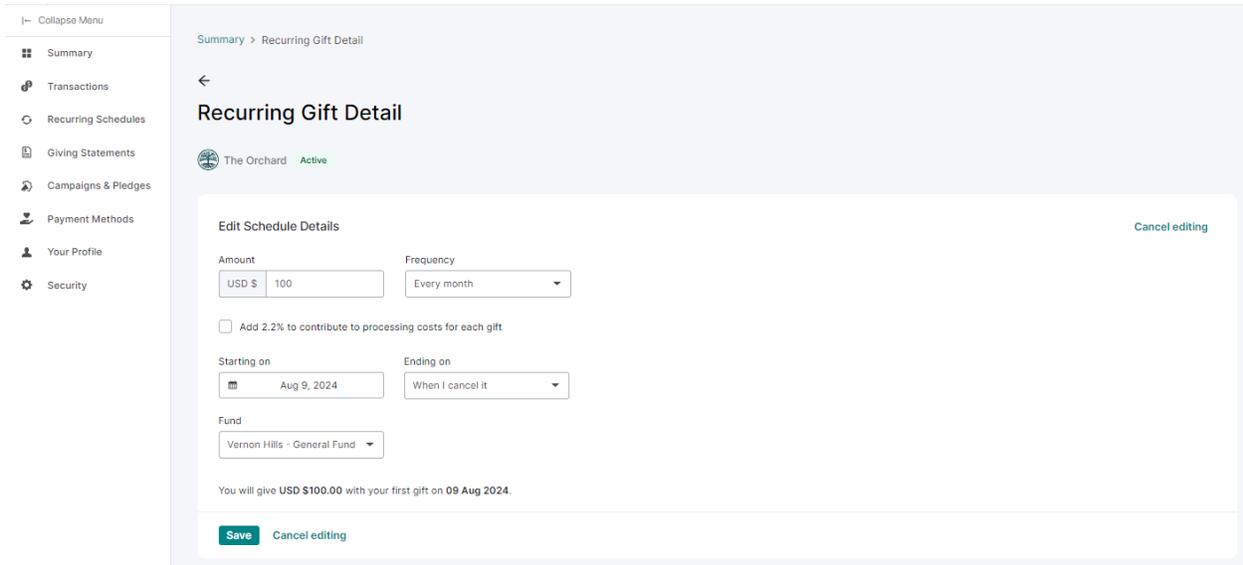
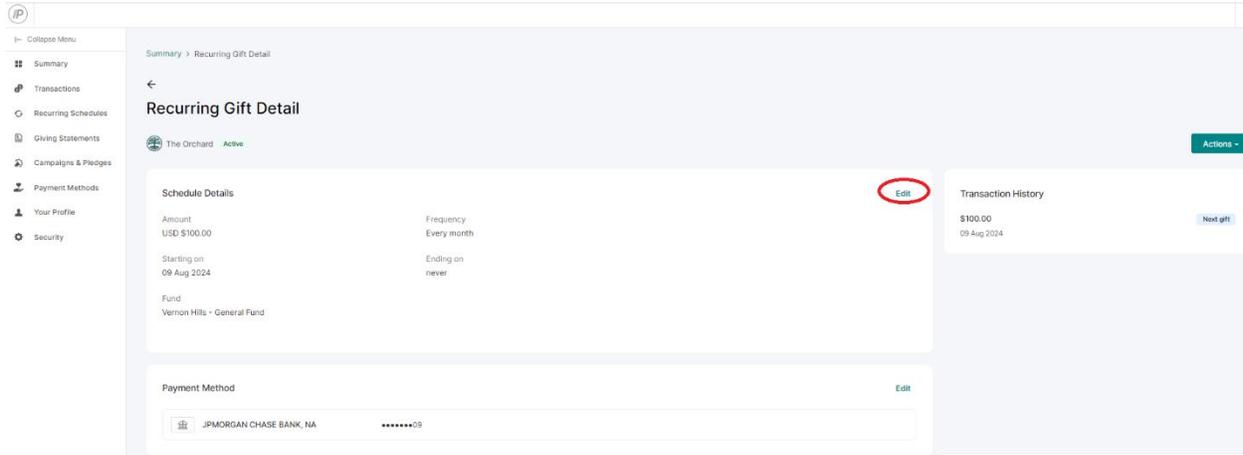


This screenshot is similar to the previous one, but the 'Edit' link next to the '\$100.00' amount in the 'Recurring gifts' table is circled in red. The rest of the interface remains the same.

Organization	Date	Amount	Action
The Orchard	09 Aug '24	\$100.00	Edit

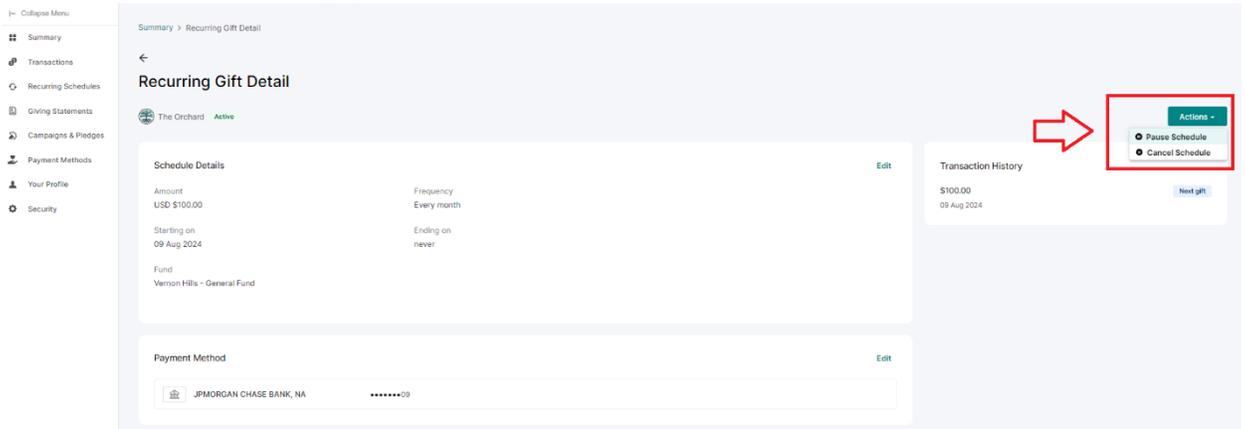
Changing your Recurring and Scheduled Gift(s)

1. When viewing the detail of the recurring gift, click “Edit” to change & click “Save”
 - The amount of the gift
 - The frequency of the gift
 - The schedule of the gift
 - The fund designation



Changing your Recurring and Scheduled Gift(s)

1. To cancel the recurring gift, click “Actions” and “Cancel Schedule”



2. Confirm your cancellation by clicking “Yes, Cancel”

