Help

Add a Recurring Donor

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The **Recurring Donor Management** Dashboard acts as a manual gateway for adding recurring donations. For instance, if you have a supporter on the phone who would like to become a recurring donor, you can set up their recurring donation within the dashboard.

To add a recurring donation, go into **Recurring Payments** and click the **Add Recurring Payment** button.

You will be taken into the Manual Payments flow. Here you will be prompted to choose your Processing Method. Choose **Use the Flipcause Gateway to process this payment**

Add the amount and frequency. If you **choose a recurring frequency** you will be given the option to process the payment now or set the first payment to process at a later date. Click **+Add More Information** to continue.

In the **More Information** section you will find the following subsections (*Note: all of the following fields are optional*):

- **Contact Record Assignment** - Assign the contact to an existing contact record or create a new contact record
- **Campaign Information** - Assign the recurring payment to a specific existing campaign
- **Personal Information** - Collect information such as First Name, Last Name, Email, and Mailing Address from your supporter
- **Custom Fields** - Add any relevant custom fields
- **Payment Notes** - Add a Payment Title or Payment Description
- **Taxes & Discounts** - Add an tax-deductible amount and/or discounts
- **Receipt Info** - Add what information you would like the email confirmation sent to supporters to contain such as a custom message, tax-deductible amount, and disclaimer.

Click **Proceed to Checkout.**

In the final **Checkout** section, you will see a summary of the payment. Here, you will enter the supporter's payment information. Click **Finish**.
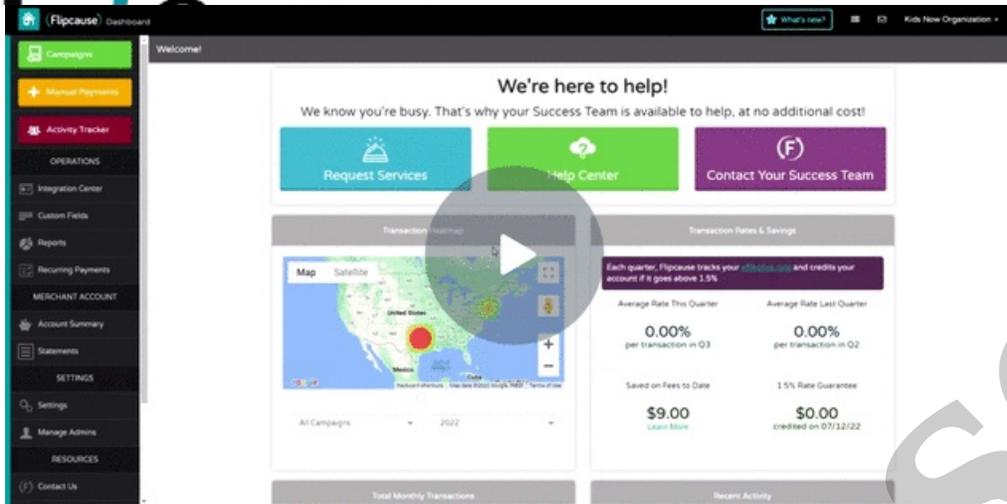
And VOILÀ! You've just added a recurring donor.