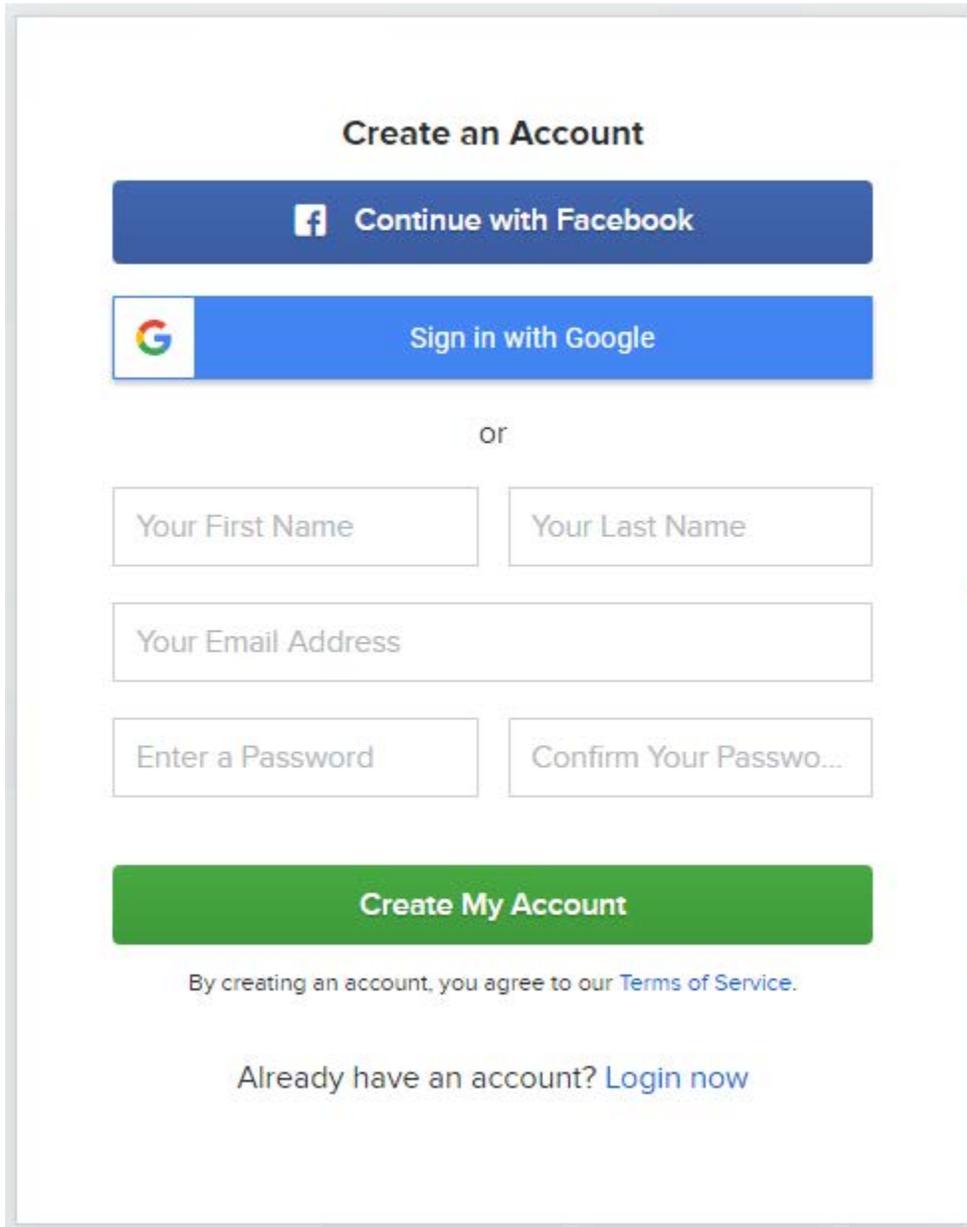


When you visit an organization's donation form, you'll see the options to **Create an Account or Log In** along the top of the form.

**Create an Account or Log In**

Once you've clicked **Create an Account**, you'll see the following:



The screenshot shows a 'Create an Account' form. At the top, it says 'Create an Account'. Below this are two social login buttons: 'Continue with Facebook' (with a Facebook icon) and 'Sign in with Google' (with a Google icon). Below these is the word 'or'. There are four input fields: 'Your First Name', 'Your Last Name', 'Your Email Address', and 'Enter a Password'. To the right of the password field is a 'Confirm Your Passwo...' field. At the bottom is a large green button labeled 'Create My Account'. Below the button, it says 'By creating an account, you agree to our [Terms of Service](#).' At the very bottom, it says 'Already have an account? [Login now](#)'.

Once you create your account, you'll be taken back to the form, where your basic info will be filled in. To edit your account information, click **My Account** in the upper-right corner of the form.

### My Giving Dashboard

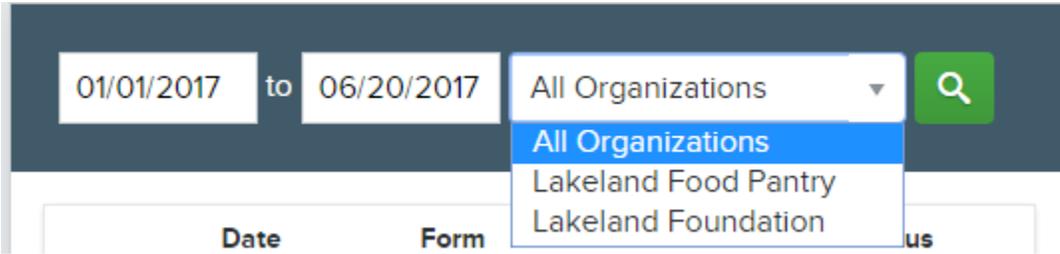
After clicking **My Account**, you'll be taken to your **Giving Dashboard**, where you can view your donation history, manage payment methods, set up and edit recurring donations, and edit your personal information. We're using an account that already has donations associated with it. If you have any recurring donations with upcoming bill dates, you'll see those displayed in the **Billing Soon** area along the bottom of the dashboard.

The screenshot shows the 'My Giving Dashboard' interface. At the top, there are four icons: a person, a credit card, a refresh symbol, and a document. Below the icons is the title 'My Giving Dashboard'. A search bar contains the date range '01/01/2017 to 07/12/2017', the organization 'Lakeland Food Pantry', and a search icon. Below the search bar is a table with the following data:

	Date	Form	Amount	Status
371589	07/12/2017	Lakeland Food Pantry	\$50.00	Accepted

Below the table is a pagination control showing '1' and a 'Per Page: 10' dropdown menu. At the bottom, there is a 'Billing Soon' section with the date 'AUGUST 12, 2017', the text 'Automated - For Transaction #371589', and the amount '\$50.00'.

You can narrow the results displayed in the table by entering a donation date range or by choosing an organization from the drop-down, if applicable. Organizations will only show up in this drop-down if you've donated to them.



The screenshot shows a search filter interface with a date range of 01/01/2017 to 06/20/2017 and a dropdown menu for organizations. The dropdown menu is open, showing three options: All Organizations (highlighted in blue), Lakeland Food Pantry, and Lakeland Foundation. A search icon is visible to the right of the dropdown.

If you click the transaction number in the far-left column of the table, you'll be taken to the online confirmation page for that transaction.

[My Account](#)

[Print Receipt](#)

### Thank you for your donation!

The details of your donation can be found below. You'll also receive an email receipt for your records!

**Amount: \$100.00**

Transaction ID: 371592  
Date: July 12, 2017 at 2:57:07 PM (EST)  
Payment Type: Visa ending in XX11

#### Personal Information

**Sarah Sebastian**  
207 Bartow Road  
Lakeland, Florida 33801 US  
[sarahs@example.com](mailto:sarahs@example.com)

Opt-in: No

#### Billing Information

**Sarah Sebastian**  
207 Bartow Road  
Lakeland, Florida 33801 US  
[sarahs@example.com](mailto:sarahs@example.com)

#### Billed Transaction Details

**One-Time** **\$100.00**

Restriction: Location-Downtown

---

**Total: \$100.00**

Click **My Account** to return to your Giving Dashboard.

## Payment Methods



Under the **Payment Methods** tab you can add and save credit card or eCheck information so you can easily choose a stored payment type when donating to an organization. Click **Add Payment Method** to get started.

## Payment Methods

You haven't added any payment methods yet. [Add Payment Method](#)

In the first section, add a label for your payment method. This is what will appear as the name of the payment option when you're on a donation form.

### How would you like to label this payment method?

Add a label to help you quickly identify a payment method for future use. This field is required.

For credit cards, enter your card number and expiration date.

### Payment Information

Card Number REQUIRED

Expiration Date REQUIRED

07 - July ▼ 2017 ▼

For eChecks, enter your account and routing numbers.

### Payment Information

Routing Number REQUIRED

 ?

Account Number REQUIRED

 ?

Enter the **Billing Information** associated with the payment type and click **Save Payment Method**.

### Billing Information

First Name REQUIRED

Last Name REQUIRED

Address REQUIRED

Address Line 2

City REQUIRED

State REQUIRED

Select a State ▼

Zip Code REQUIRED

Country REQUIRED

United States ▼

**Save Payment Method**

Once you've saved a payment method, you'll be taken to the main listing of stored methods, where you can add, edit, or delete items at any time.

## Payment Methods

**My Visa** ● Edit Delete

 XXXX XXXX XXXX XX11  
Expiration: 07/17

---

**My Bank Account** ● Edit Delete

 Account: XXXXXX89

---

[+ Add Payment Method](#)

### Recurring Gifts



In the **Recurring Gifts** tab you can view, pause, resume, edit, or delete any recurring donations you have set up.

## Recurring Gifts

 **Automated - For Transaction** Edit Delete  
#371589  
\$50.00 every month

If you'd like to pause a recurring donation and start it up at a later date, click the icon to the left of the payment.



**Automated - For Transaction**

[Edit](#) [Delete](#)

#371589

\$50.00 every month

The icon will change as shown below. When you'd like to restart the recurring payment, click the play icon.



**Automated - For Transaction**

[Edit](#) [Delete](#)

#371589

\$50.00 every month

When you click **Edit** for a recurring transaction, you'll be taken to the following:

## Recurring Gifts

### Automated - For Transaction #371589

**NICKNAME**

Automated - For Transaction #371589

[Edit](#)

**AMOUNT AND RESTRICTION**

\$50.00

Location - Downtown

[Edit](#)

**FREQUENCY**

Monthly starting 07/12/2017

[Edit](#)

**PAYMENT INFORMATION**

Credit Card ending in XX11

[Edit](#)

**PERSONAL INFORMATION**

Sarah Sebastian

207 Bartow Road

Lakeland, Florida 33801 US

sarahs@example.com

[Edit](#)

In the **Nickname** section, you can edit how the recurring gift is labelled in your Recurring Gifts area. Click **Save Recurring Nickname** once you've set it as desired.

**NICKNAME** **Edit**  
Automated - For Transaction #371589

**How you you like to label this recurring gift?**

Add a label to help you quickly identify a recurring gift. This field is required.

**Save Recurring Nickname**

Clicking **Edit** next to **Amount and Restriction** gives you the option to change your recurring amount and/or the restriction to which you are giving.

**AMOUNT AND RESTRICTION** **Edit**  
\$50.00  
Location - Downtown

**\$20.00** **\$30.00** **\$50.00** **\$100.00**

Other \$

Please direct my donation to:

Which pantry location?

I'd like to help cover processing costs - add **\$2.00** to my transaction

**Save Recurring Details**

You can edit how often your recurring donation occurs by editing the **Frequency**.

FREQUENCY  
Monthly starting 07/12/2017

Edit

**How often would you like to make this gift?**

Select a Frequency:

Weekly  Monthly  Quarterly  Annually

Starting **07/12/2017** Ending

[Save Recurring Frequency](#)

You can also choose another stored payment option or add a new payment method for the recurring donation by clicking **Edit** next to the **Payment Information** section. If the organization to which you're donating has PayPal as a payment option, you'll see that here, as well. It is not offered as a stored payment option in accordance with PayPal's security guidelines.

PAYMENT INFORMATION  
My Visa

Edit

**Select a Payment Method**

Payment Method:

- Select Payment Option
- My Visa**
- My Bank Account
- PayPal
- Add a New Payment Method

[Save Payment](#)

To edit the personal information stored for this recurring payment, click **Edit** next to **Personal Information**.

PERSONAL INFORMATION

Edit

Sarah Sebastian  
207 Bartow Road  
Lakeland, Florida 33801 US  
sarahs@example.com

### Personal Information

Enter your personal information associated with this gift.

Company Donation

First Name **REQUIRED**

Sarah

Last Name **REQUIRED**

Sebastian

Address **REQUIRED**

207 Bartow Road

City **REQUIRED**

Lakeland

State **REQUIRED**

Florida ▼

Zip **REQUIRED**

33801

Country **REQUIRED**

United States ▼

Company

Email **REQUIRED**

sarahs@example.com

Phone number

Yes! Lakeland Food Pantry may contact me at the email address above.

Save Recurring Personal Information

## My Account



The **My Account** tab is where you'll go to updated global account information. The **Account Information** and **Communication Preferences** sections are where you can update the name and address associated with your account, as well as enter your email address and choose whether or not you'd like to be alerted when any changes to your account occur.

### Account Information

Company Name

First Name REQUIRED

Last Name REQUIRED

Address

City

State

Zip Code

Country

Phone Number

### Communication Preferences

Receive email alerts when changes to your account occur.

### Login Information

Email Address

Save Information

There is also a section in which you can update your password.

### **Update My Password**

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Enter Your Current Password

Enter a New Password

Confirm Your New Password

**Update Password**

At the bottom of this section, you'll see the option to log out of your account.

### **Logout**

---

**Log Out of My Account**