

How to manage recurring donations

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Recurring donations (monthly, quarterly, etc.) provide reliable support and are worth tracking carefully.

Viewing a recurring gift

1. Locate the original donation or the recurring commitment record.
2. Review the schedule (frequency), next expected payment date, and history of payments received.

Making changes

To stop, pause, or change the amount of a recurring donation, follow your organization's process. This usually involves:

- Updating the record in HelpOne
- Coordinating with the payment processor if needed
- Notifying the donor of the change

Keeping recurring donations accurate supports forecasting and good donor relations.
