

QUICK START GUIDE

Your Donor Self-Service Portal

Thank you for supporting our organization! The Donor Self-Service (DSS) Portal is provided to allow you to review and manage your donations and personal information.

In the portal, you can:

- Review and export your donation history.
- Update your personal information (profile).
- Manage your recurring donations, including the schedule, payment method, amount...and more!

LOGIN TIPS

Login: <https://donor.idonate.com>

You have two options for logging in, as shown here:

- (A) By code
- (B) By account

If this is your first time to login to the portal, be sure to review your profile. Edit your name and contact information if needed, or add them if none is present. Add an account password so that you may easily access the portal in the future.

The following instructions apply to setting up or updating your account.

Login URL: <https://donor.idonate.com>

First Time Users
Type in your email address and then click "GET CODE." iDonate will immediately send you a 6-digit code to input into this field.

Next Time
If you set up a password last time, just click "Login" to skip the two-step code process. You'll get a normal login screen like this one (B).
Didn't set up a password last time? Just use the code method as many times as you want!

UPDATE YOUR PHONE NUMBER

(A) Once you've logged in, you have the option to update your phone number for verification purposes. (Recommended)

YOUR DASHBOARD

This is where you can access every aspect of your donations:

- (B) Your profile
- (C) Recurring Donations
- (D) Payment Methods
- (E) Recent Transactions

To access specific details of each of these perspectives, simply click on the "View all" drop-down arrows.

Recurring Donations (C) View all

Organization Name	Amount
Impact Project	\$90.00

Payment Methods (D) View all

VISA	XXXX-XXXX-XXXX-1111
MasterCard	XXXX-XXXX-XXXX-1117 Default

Recent Transactions (E) View all

Donation Date	Amount	Organization Name
6/3/2019	\$20.00	Impact Project
6/3/2019	\$40.00	Impact Project
6/3/2019	\$30.00	Impact Project
6/3/2019	\$0.00	Impact Project
5/27/2019	\$20.00	Impact Project
5/27/2019	\$40.00	Impact Project

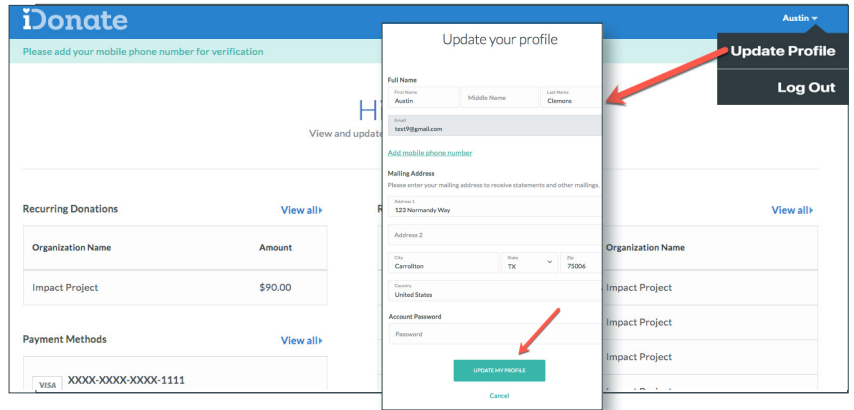
DONOR SELF-SERVICE PORTAL QUICK START GUIDE

NAVIGATING THE PORTAL

YOUR PROFILE

Update your personal details and save your changes.

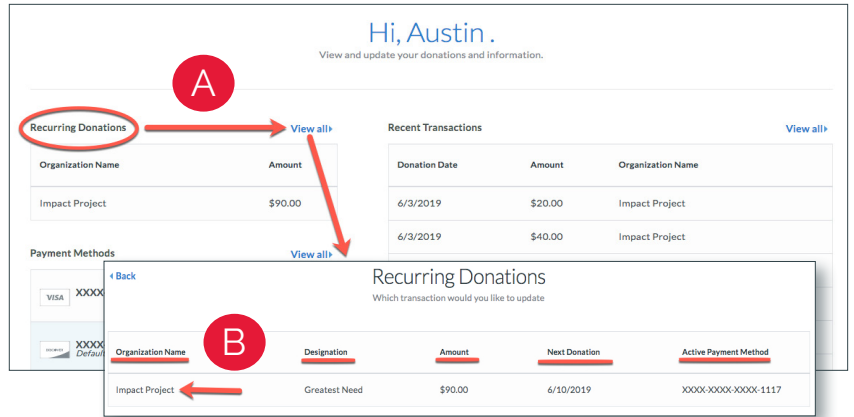
- Adding your information allows you to login when making a donation and have your name, address, and email address pre-populated on the giving form.
- Setting your password allows you to directly login to the portal without requesting a verification code.



RECURRING DONATIONS

(A) After clicking View All, click on the recurring donation you want to update **(B)**.

From there you can change the designation, amount, payment method, frequency or next payment date of the donation. Click **Save Changes** when done.



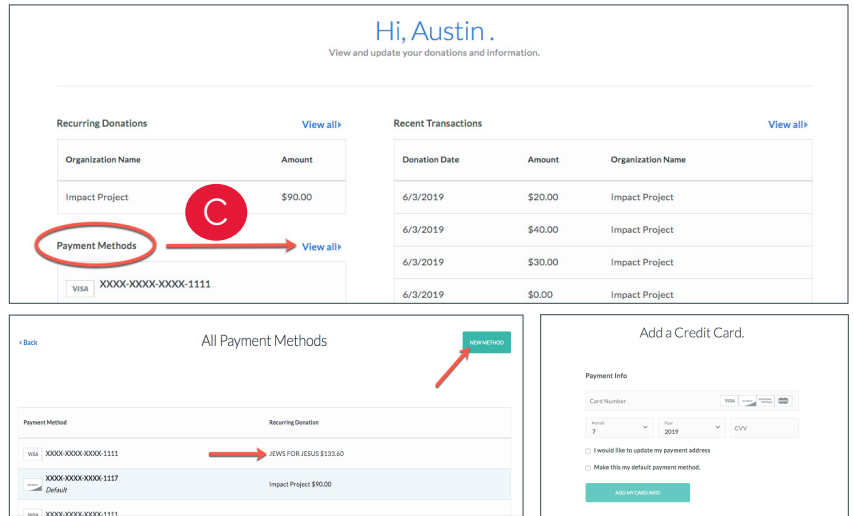
PAYMENT METHODS

(C) From the dashboard, click View All, and then click on the payment method you want to update. From there, you can:

- Change the card number, expiration date, and CVV.
- Click the New Method button on the All Payment Methods screen to add a new payment method.
- Add credit card or bank account payment methods.

Note: If you need to assign a payment method to a recurring donation, you must add the new payment method here first, and then edit the recurring donation and assign the new payment method.

To delete a payment method, you must first associate any existing recurring schedules to a new payment method and save. Then you can go to the payment method and delete it.



RECENT TRANSACTIONS

(D) From the dashboard, click View All to see your donation history. Use the Export button **(E)** to download or print your donation history.

