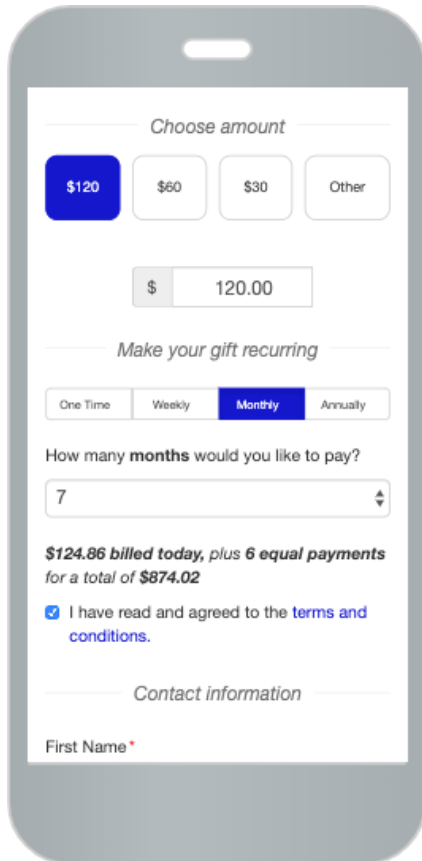


# Recurring Donations Section

Last Modified on 05/20/2022 12:03 pm PDT

Recurring Giving is a great way to maximize donations and ensure constant funding from top supporters.



Choose amount

\$ 120.00

Make your gift recurring

How many months would you like to pay?

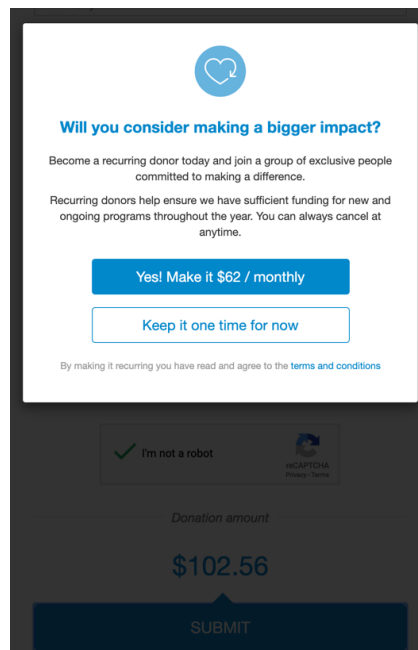
7


**\$124.86 billed today, plus 6 equal payments for a total of \$874.02**

I have read and agreed to the [terms and conditions](#).

Contact information

First Name \*






**Will you consider making a bigger impact?**

Become a recurring donor today and join a group of exclusive people committed to making a difference.

Recurring donors help ensure we have sufficient funding for new and ongoing programs throughout the year. You can always cancel at anytime.

By making it recurring you have read and agree to the [terms and conditions](#)

I'm not a robot 

Donation amount

**\$102.56**

For more about how Recurring Donations function, [click here](#). Read below for how to enable the different capabilities of Recurring Donations.

## Recurring Donations

### Section Heading

Make your gift recurring

### Accept Recurring Payments

Enable

### Set Recurring Payment Type

- Ongoing  
e.g. \$100 / monthly
- Fixed Term  
e.g. \$100 / monthly for 12 months
- Pay Over Time  
e.g. \$100 / 4 installments of \$25

### Frequency

One Time Weekly Monthly Quarterly Annually

Select up to 4

### Default Frequency

One Time

### Encourage Recurring Donations

Disable

Prompt donors to become recurring donors



+ Add Form Element

## Section Heading

The Section Heading can be changed or left blank if you do not want a section break to show.

## Accept Recurring Payments

If you wish to not use Recurring Donations on your form you can use the Enable/Disable switch to turn off Recurring Donations completely.

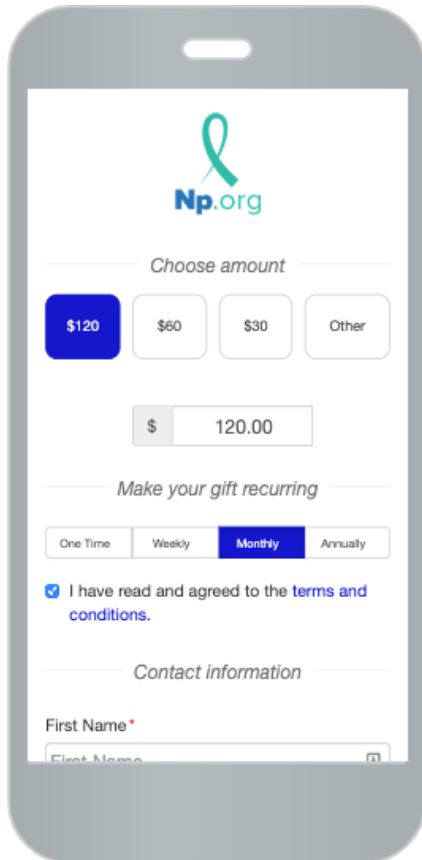
In general, it is recommended to have Recurring Donations enabled. Those donors who do choose to set up a recurring donation do tend to give more than those who don't.

## Set Recurring Payment Type

**Ongoing:** This is the typical and default form of Recurring Giving. It does not have an "end date." So it is designed for a general recurring donation, such as a weekly, monthly, quarterly or annual gift.

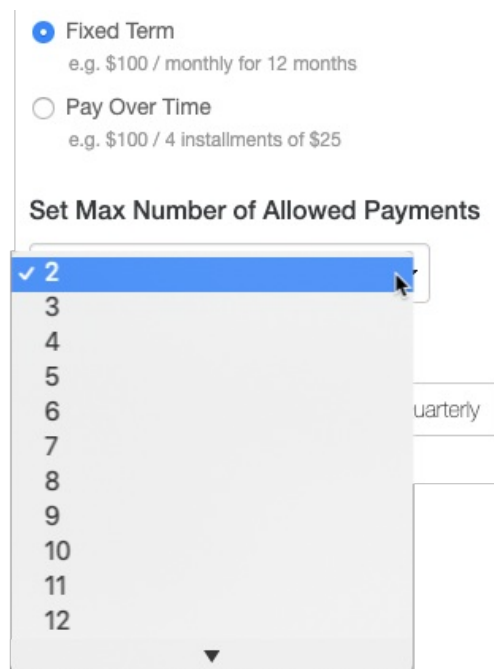
When you select to make your gift recurring (with any of the Payment Types), it will provide a link

to the [Recurring Gift Terms and Conditions](#) that you can review.



**Fixed Term:** This puts an expiry date on the gifts. Such as wanting to donate \$50 per month, for the next 12 months and then you as the donor are done with this recurring gift and would need to set up a new gift to continue giving.

When you choose Fixed Term, it will allow you to choose the maximum number of payment choices for your donor, from 2 to 36.



When a donor selects the Recurring Donation Frequency and then chooses how many of that

frequency they wish to give (example: They choose a "Monthly" recurring donation and can choose how many months to give), the form will show the current donation amount (including processing fees if applicable) and advise the donor that they are agreeing to the additional payments with a total amount shown.

The screenshot shows a mobile app interface for a donation form. It is divided into three main sections:

- Choose amount:** Features four buttons: "\$120" (highlighted in blue), "\$60", "\$30", and "Other". Below these is a text input field showing "\$ 120.00".
- Make your gift recurring:** Includes four radio buttons: "One Time", "Weekly", "Monthly" (selected and highlighted in blue), and "Annually". Below this is a question "How many months would you like to pay?" with a dropdown menu showing the number "8".
- Summary and Agreement:** Displays the text "\$124.86 billed today, plus 7 equal payments for a total of \$998.88". Below this is a checked checkbox with the text "I have read and agreed to the terms and conditions.".
- Contact information:** A section header followed by a text input field labeled "First Name \*".

**Pay Over Time:** This allows you to pay your donation in installments. You, as the donor, may want to give a total, but prefer to give that total amount in smaller amounts over time. (For example, you want to give \$120, but maybe you can only afford to give \$10 per month, so you can give over 12 months)

- Fixed Term  
e.g. \$100 / monthly for 12 months
- Pay Over Time  
e.g. \$100 / 4 installments of \$25

### Set Max Number of Allowed Payments

The screenshot shows a dropdown menu with a list of numbers from 2 to 12. The number "2" is selected and highlighted in blue, with a checkmark to its left. A mouse cursor is visible over the "2". To the right of the dropdown, a text input field contains the word "quarterly".

When a donor selects a donation amount, then the Recurring Donation Frequency, they then choose how many of that frequency they wish to break up the donation amount into (*example: They choose a "Monthly" recurring donation and can choose how many months to settle that amount*), the form will show the current donation amount as a fraction of the total gift (including processing fees if applicable) and advise the donor that they are agreeing to the additional payments with the total amount shown.

The screenshot shows a mobile form with the following elements:

- Choose amount:** Four buttons labeled "\$120", "\$60", "\$30", and "Other". The "\$120" button is highlighted in blue.
- Amount input:** A text box containing "\$ 120.00".
- Make your gift recurring:** Four buttons labeled "One Time", "Weekly", "Monthly", and "Annually". The "Monthly" button is highlighted in blue.
- Frequency question:** "How many payments will you be making?" with a dropdown menu showing "12".
- Summary:** "\$10.46 billed today, plus 11 equal payments for a total of \$124.86".
- Agreement:** A checked checkbox followed by the text "I have read and agreed to the terms and conditions.".
- Contact information:** A label "First Name\*" with a red asterisk.

## Frequency

You can set the Frequency options that will appear on the form. There are five choices, but there is only room for four on the form, so you can choose up to four frequencies. If you choose less, the buttons will change dynamically on your form.

The image shows two examples of the "Make your gift recurring" section:

- Example 1 (Left):** Shows four frequency options: "One Time", "Weekly", "Monthly", and "Quarterly". The "Monthly" option is selected and highlighted in blue.
- Example 2 (Right):** Shows three frequency options: "One Time", "Monthly", and "Annually". The "Annually" option is selected and highlighted in blue.

Both examples include a checked checkbox and the text "I have read and agreed to the terms and conditions.".

## Frequency

One Time Weekly Monthly Quarterly Annually

Select up to 4

## Default Frequency

✓ One Time  
Monthly  
Annually

## Default Frequency

You can also set any of your selected frequencies to become the **Default Frequency**. Only selected Frequencies will be visible in the Default Frequency dropdown.

By selecting something other than "One Time" for the Default frequency provides the suggestion to your donors that you would like them to choose a recurring gift and gives them one less thing to select as they fill out the form.

In general, unless your campaign is focused and discussed recurring donations, it is better to leave the Default frequency as One Time.

## Encourage Recurring Donations

When you enable the **Encourage Recurring Donations**, your donors will be prompted when they submit their one-time donation to reconsider making it a recurring donation.

When you **edit** the **Encourage Recurring Donations**, you can personalize the message given to the donor and also the amount they will be prompted for, for their recurring donation (rounded to the nearest dollar).

**Prompt when amount is less than:** You can change the threshold amount from the default of \$500. This control helps you determine when the Encourage window will appear. When the donation is less than this amount, the prompt will appear. If the amount is at least this amount or more, they will not be prompted

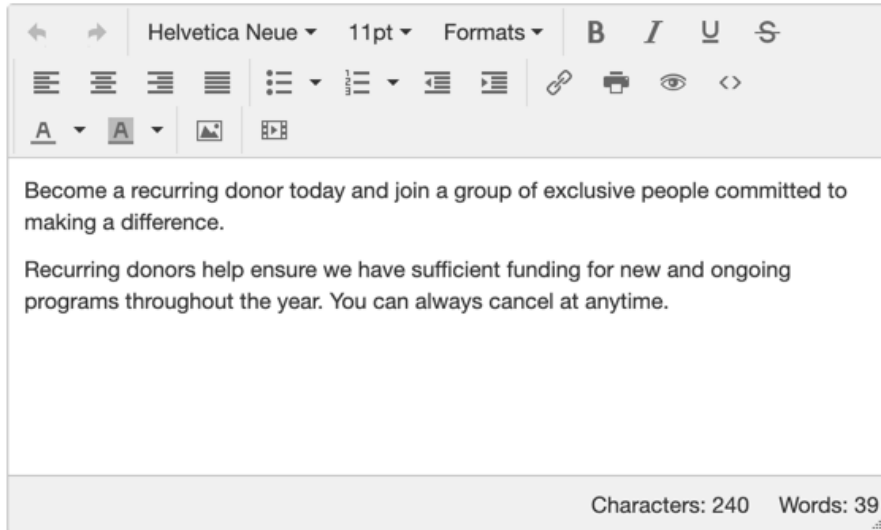
**Note:** You are encouraged to change the message that will appear, but we generally recommend leaving the percentage at the 60% to start. As indicated in the Edit screen studies show that prompting donors to become recurrent donors for just that 60% of their original gift can increase the number of recurring donors by up to 64%.

Feel free, though to experiment with the value to find the best amount that fits your organization.

## Edit - Encourage Recurring Donations

Studies show that prompting donors to become recurrent donors for just 60% of their original gift can increase the number of recurring donors by up to 64%.

### Customize Message



A rich text editor interface with a toolbar at the top containing options for font (Helvetica Neue, 11pt), bold (B), italic (I), underline (U), strikethrough (ABC), bulleted list, numbered list, indent, link, unlink, print, eye, and code. Below the toolbar is a text area containing the following message:

Become a recurring donor today and join a group of exclusive people committed to making a difference.

Recurring donors help ensure we have sufficient funding for new and ongoing programs throughout the year. You can always cancel at anytime.

At the bottom right of the text area, it displays "Characters: 240" and "Words: 39".

### Prompt when amount is less than

### Prompt donor for **60%** of the original donation amount



A horizontal slider control with a blue track and a blue circular handle. The track is labeled with percentages: 0%, 20%, 40%, 60%, 80%, and 100%. The handle is currently positioned at the 60% mark.

Cancel

Save

Note: If you have a situation where you are using the security feature, **Confirm before submitting** described in the **Form Submit** section *and* **Encourage Recurring Donations**, and the donation amount would activate the **Encourage Recurring Donations**, then the **Confirm before submitting** feature will not activate, since a window requiring the supporter's input satisfies the security feature.

## Receipts and Notifications

You will also want to review the Receipts and Notifications section, here. This section will give you control of what kind of alerts (Text or SMS and Email) that your recurring donors will receive.

## Add Form Elements

If you wish to further personalize the section you can **Add Form Element**, such as adding a text,

image or video to further make your ask for the recurring donation. For more on Form Elements, [click here](#).

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