

## Updating Payment Details

**Note:** Your User level must be "Administrator" to update credit card information.

### Account Search

- From the Main Menu, go to Recurring Payments.
- Use the quick links in the middle of the page or the search features on the left.
- Make sure to delete any dates in the date range fields to ensure an accurate search.
- Search for an individual contributor by using the name fields on the left or find all recurring contributors by selecting the recurring frequency from the "Recurs" drop-down field and click "Go."
- To display the detail page, click on the Transaction ID number.

**GIVEDIRECT**

Main Menu

Recurring Payment Search Fields

Search

My Forms  
Select

Transaction ID

First Name

Last Name

Email Address

Date Range  
03/01/2020 03/31/2020

**Manage Recurring Payments**

Hello Janet,

**What would you like to look up today?**

I would like to see...

- [All active recurring payments](#)
- [Recurring payments set up today](#)
- [Recurring payments set up this month](#)
- [Recurring payments set up last month](#)

### To update a card number,

- Go to the bottom of the page to the Payment Information section and click the link to "Add or Change Credit Card."
- Enter the full card number, security code, and expiration date and click "Verify Credit Card" if that option is present (Visa, Discover, MC). If the credit card information passes verification, click the "Save Changes" button to save the new information.

**Payment Information**

[Add or Change Credit Card](#)

Card Number	Expiration Date	Card Type	Total
1*****5273	0523	V	100.00

Save Changes

**To update the expiration date,** follow the instructions above but **only** enter the new expiration date and click "Save Changes." An updated security code is not required if the only change is to the expiration date.

If your donor has missed any payments that he wishes to make up, please notify GiveDirect at [support@givedirect.org](mailto:support@givedirect.org) or 866-459-6420. We will be happy to process any missed payments.