crimson

FAQ – How to Stop a Recurring Gift in Crimson

You can stop recurring gifts that were originally processed in Crimson (through Donate Now or Data Entry) directly in the money record.

* **NOTE**: If the recurring gift was first processed through Crimson before 11/1/2015, please contact <u>CrimsonSupport@cmdi.com</u> for assistance in stopping the recurring contribution.

If the recurring gift was first processed through WidgetMakr, please reference WidgetMakr's HelpDesk FAQ on <u>How to Stop a Recurring Gift in WidgetMakr</u>.

You can stop a recurring gift that was originally processed in WidgetMakr (on/after 11/1/2015) in Crimson, but the details for that record in WidgetMakr will not indicate that the recurring transaction was already stopped in the database.

Stopping a Recurring Gift in Crimson:

- 1. Search for the donor using the **People Search** and open the people record.
- 2. Confirm that you are in the gift view by selecting the **Giving History** panel.
- 3. Then click **All** in the top right hand corner of the panel summary to see all the gifts.
- 4. Find the original recurring gift the donor first submitted.
- 5. Open that money record by double-clicking on it or pressing the button.
- 6. At the bottom of the money record, find and press the Stop Recur button to stop the recurring gift from processing going forward.
- 7. You will be asked "Are you sure to stop recurring this gift?" Press Yes.
- Once the recurring gift has been successfully stopped, the **Recurring** Checkbox will no longer be checked and the Stop Recur button will no longer be available in the money record.