

# Your Donor Self-Service Portal



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

## Login Tips:

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

### New Account

- Enter your email address and click **GET CODE**
- Enter the **Login Verification** code from your inbox and click **GO**

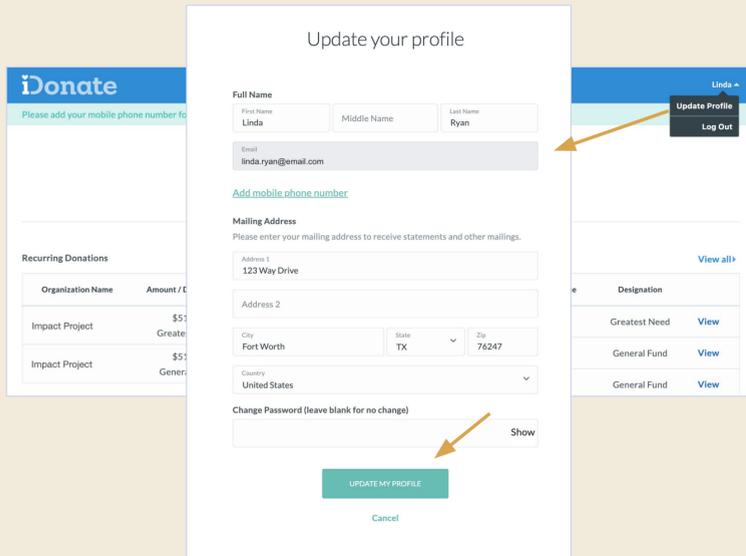
### Returning User

- Click **Login** and enter your email and password
- Click **LOGIN** to access your portal account!

## Donor Self-Service (DSS) Portal Quick Start Guide

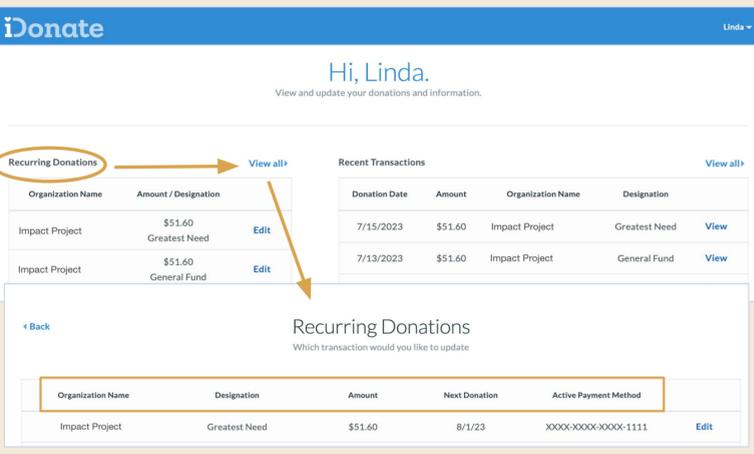
### Your Profile

- 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

- After clicking **View All**, click on the recurring donation you want to update
- You may change the designation, amount, payment method, frequency, or next payment date of your donation. Click **Save Changes** when done

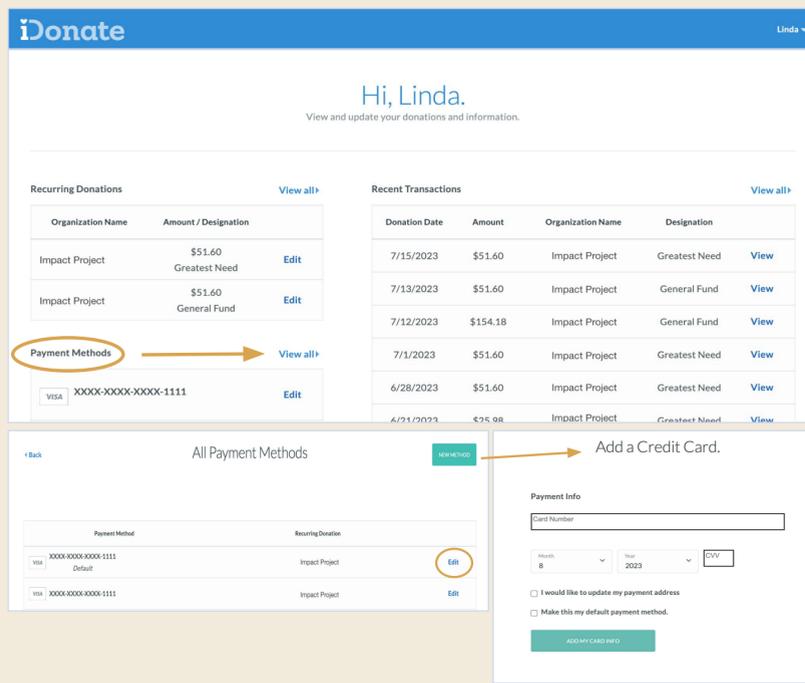


### Payment Methods

From the dashboard, click **View All** to open the Payment Methods screen.

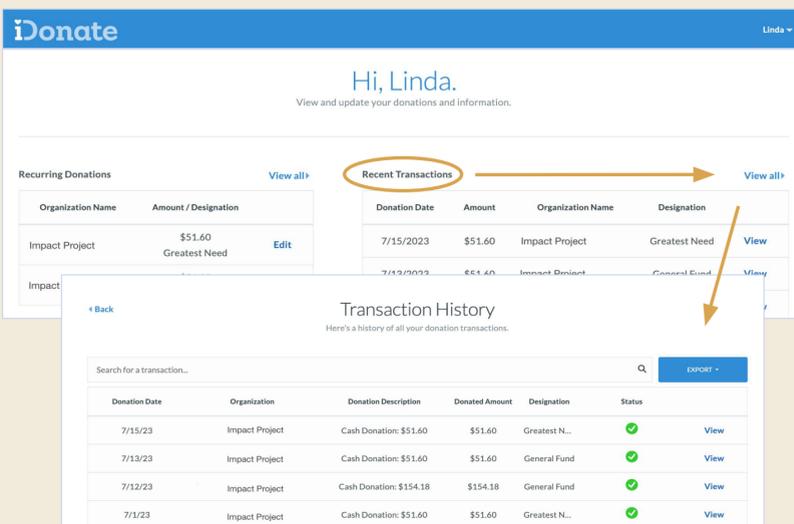
- Click **New Method** to add a new credit card or bank account.
- Select a payment method to update the card number, expiration date, and CVV.

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



### Recent Transactions

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



### Update Your Phone Number

Once you've created a Donor Self-Service (DSS) Portal account, you have the option to update your phone number in your Profile for verification purposes. This action is recommended.