

VERSION 1.0

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## HOW TO DONATE ONLINE AND MANAGE YOUR GIVING

A HELP DOC FOR USING IDONATE

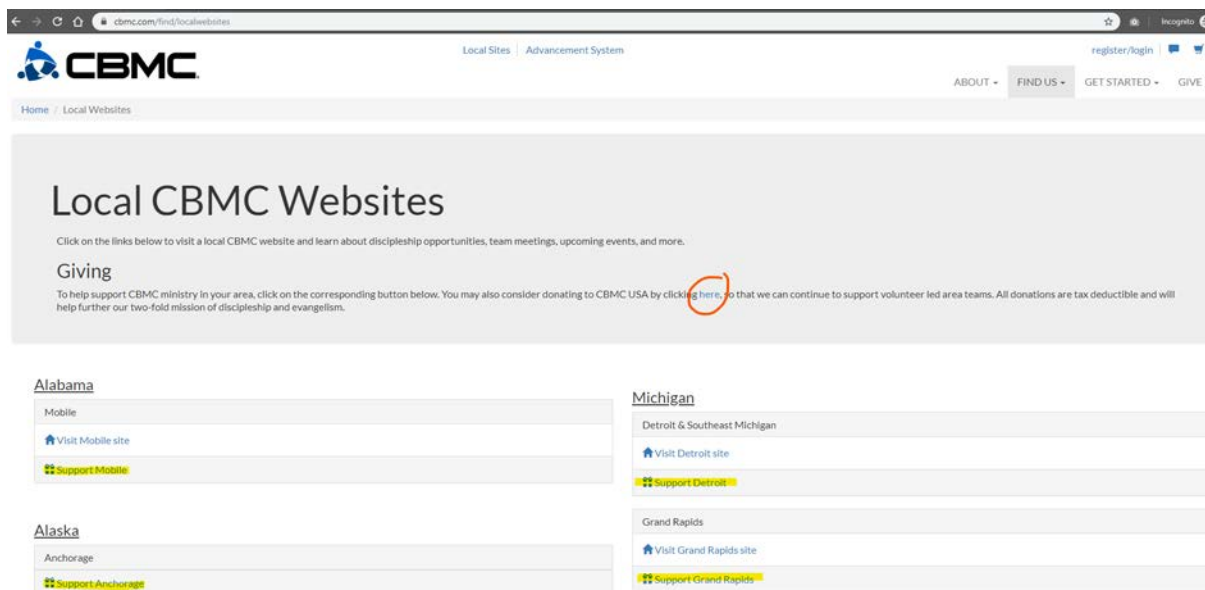
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## HOW TO MAKE A DONATION

### VISIT A CBMC IDONATE PAGE

CBMC iDonate pages are accessible from multiple sources on the web. The suggested path is to visit the Local CBMC Websites page (<https://www.cbmc.com/find/localwebsites>). From here you can browse and click to support the area of your choosing, seen highlighted below. To give to National click the “here” link (circled below).



To donate to a specific person or area team, click the support link under their state/area.

### COMPLETE THE DONATION FORM

Once you’ve clicked and opened the iDonate give page of your choosing, you’ll see a simple donation form. Start from the top of the form and work your way down. First, you’ll see varying options for what you’d like to donate (seen below highlighted in yellow). This can include Money, Vehicles<sup>1</sup>, Assets<sup>1</sup>, Gift Cards<sup>1</sup>, and Other<sup>1</sup>. The rest of the form will change depending on your selection.

On the donation form, fields marked with \* are required.

Since Money is the most common section, we’ll cover it’s form a bit more. Choose from the preset amount options or enter in the custom dollar amount you wish to donate (seen below circled in red) and choose your payment type. Continue down the form and select the frequency in which you wish to make this donation from the dropdown options (seen below highlighted in green).



Donation > Payment Info ? [Login](#)

What would you like to donate?

Money	Vehicle	Assets	Gift Card	Other
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\$50	\$75	\$100	\$200	\$300	\$500
\$ Custom Amount \$0.00					

Payment Type [Credit Card](#) [Debit Card](#) [eCheck](#)

How often do you donate?  
Monthly

Start Date  
mm/dd/yyyy

Choose your designation \*

Do you have any additional gift notes?

[Give Now](#)

One of the most important steps when donating is choosing which fund(s)/designation(s) you wish to donate to (seen above highlighted in light blue). The options in this dropdown will vary greatly depending on which iDonate page you have visited. This step is required, so you won't be able to proceed to the final page of giving without first having selected a designation. Follow the previous section "VISIT A CBMC IDONATE PAGE" for tips on finding the page you're looking for.

After clicking Give Now you'll see the second and final page of the donation form. Your email is required to receive your receipt. From here you'll enter your billing and payment info and complete the form by clicking the Give Now button with your amount.

You'll receive a receipt to the email you entered shortly.

<sup>1</sup>If you choose to donate non-money items, iDonate will contact you to assist with next steps.

## HOW TO **MANAGE** YOUR GIVING

### HOW TO LOGIN WITHOUT CREATING AN IDONATE ACCOUNT

1. Visit <https://donor.idonate.com/login>
2. Enter your primary email, the same email you used when you made your previous gift  
\*This will be the email address where you received your receipt.
3. Click “GET CODE”
4. Check that email’s inbox for an email from iDonate
5. Enter the 6-digit verification code from the email  
\*Depending on your email settings, this might be in spam.
6. Click “GO”  
\*Click “Resend email” if you haven’t received the email in your inbox or spam after 30 minutes.

7. You will now be logged in and see your dashboard with your Recurring Donations, Payment Methods, and Recent Transactions like the below.

Click the “View all” link of any section to open it and make changes as needed. This includes adding a new payment method, updating an existing payment method, updating the frequency and amount of a recurring payment, and so on. From here you can also access your transaction history at any time.

Hi, Stephen.

View and update your donations and information.

## Recurring Donations

[View all ▶](#)

Organization Name	Amount
CBMC, Inc.	\$50.00

## Payment Methods

[View all ▶](#)

VISA	XXXX-XXXX-XXXX-7408 <i>Default</i>
VISA	XXXX-XXXX-XXXX-3514

## Recent Transactions

[View all ▶](#)

Donation Date	Amount	Organization Name	Designation
5/14/2019	\$3.00	CBMC, Inc.	Solomon, Steve
8/28/2018	\$3.00	CBMC, Inc.	Northland Area
7/16/2018	\$3.43	CBMC, Inc.	National
7/16/2018	\$3.43	CBMC, Inc.	National

## HOW TO CREATE AN IDONATE ACCOUNT (QUICKER REPEAT LOGIN)

Create an iDonate account and skip over the steps outlined above, simplifying future visits.

To do this, click "Login" when you arrive at <https://donor.idonate.com/login>

Proceed to enter the email address used for your previous iDonate payment(s) and click "Forgot password?" to have a password reset link emailed to you. Follow the reset password link in the email to create your iDonate account password.

Next time you visit <https://donor.idonate.com/login> you'll be able to click "Login" and enter your iDonate account email and password.

Once your account is created, you can also click LOGIN at the top right on the donation form on future visits to automatically load your previous donation payment method.



Login

\$ Custom Amount  
\$0.00

Payment Type

Credit Card

Debit Card

eCheck

How often will you donate?

Monthly



Start Date

mm/dd/yyyy

Choose your designation \*



Do you understand this is a Membership Fee and not a donation? Enter yes to continue. \*

Notes regarding your payment:

Continue

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## HOW TO UPDATE YOUR PROFILE, BILLING, CARD INFO

From your logged in iDonate dashboard, click your name from the top right to update your profile. This includes your full name, phone number, mailing address, receipting and account email, and account password. Save changes.

# Hi, Stephen.

View and update your donations and information.



## Recurring Donations

[View all ▶](#)

Organization Name	Amount
CBMC, Inc.	\$50.00

## Payment Methods

[View all ▶](#)

 XXXX-XXXX-XXXX-7408 <i>Default</i>
 XXXX-XXXX-XXXX-3514

## Recent Transactions

[View all ▶](#)

Donation Date	Amount	Organization Name	Designation
5/14/2019	\$3.00	CBMC, Inc.	Solomon, Steve
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7/16/2018	\$3.43	CBMC, Inc.	National
7/16/2018	\$3.43	CBMC, Inc.	National

## HOW TO MANAGE YOUR RECURRING PAYMENTS

From your logged in iDonate dashboard, click the Organization Name under Recurring Donations to make changes to that recurring payment. You'll then see a page like below.



## Manage Your Recurring Payment

Organization	Current Frequency	Total Amount
CBMC, Inc.	Monthly	\$50.00

Designation	Amount
<input type="text" value="Designation"/> National	<input type="text" value="\$ 50.00"/> <a href="#">Remove</a>
<input type="button" value="ADD NEW DESIGNATION"/>	

Give \$1.94 to help cover transaction costs.

<input type="text" value="Payment Method"/> XXXX-XXXX-XXXX-7408	<input type="text" value="Frequency"/> Monthly
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Recurring Date

From here, you can change designations (which account you're donating to), add a new designation from the area's available options in the dropdown, change the amount of your recurring donation, and update your payment method, frequency, and pull date. You can also cancel your donation. Save changes.

If you want to give to a different designation or add a new designation from here but it doesn't appear in the dropdown options, the designation is not available for the donation form you completed. Donation forms and designations vary by area. That donation would have to be set up as a new donation. Follow "HOW TO MAKE A DONATION" in a previous section above for help.

## ADDITIONAL HELP

You may be sent direct links to CBMC iDonate pages via email or other communications. To ensure you're visiting a legitimate donation page, check the URL address in the top of your internet browser. CBMC National's giving page is <https://give.idonate.com/cbmc-inc/cbmc>. Area donation pages will follow the pattern of [https://give.idonate.com/cbmc-inc/\(area specific name\)](https://give.idonate.com/cbmc-inc/(area specific name)).

Only correct links to iDonate pages will work. The links must not contain a / at the end. For example, <https://give.idonate.com/cbmc-inc/cbmc> is correct, whereas <https://give.idonate.com/cbmc-inc/cbmc/> is not and will result in an error page.

**If you are looking to create or modify a Peer Advisory or Young Professional group payment, please follow the process on <http://cbmcleadershipinstitute.com/membership>**

For additional help, please email [support@cbmc.com](mailto:support@cbmc.com) with your question and contact information and a member of our finance team will be with you as soon as possible. Please do not include billing or payment information at this time.