

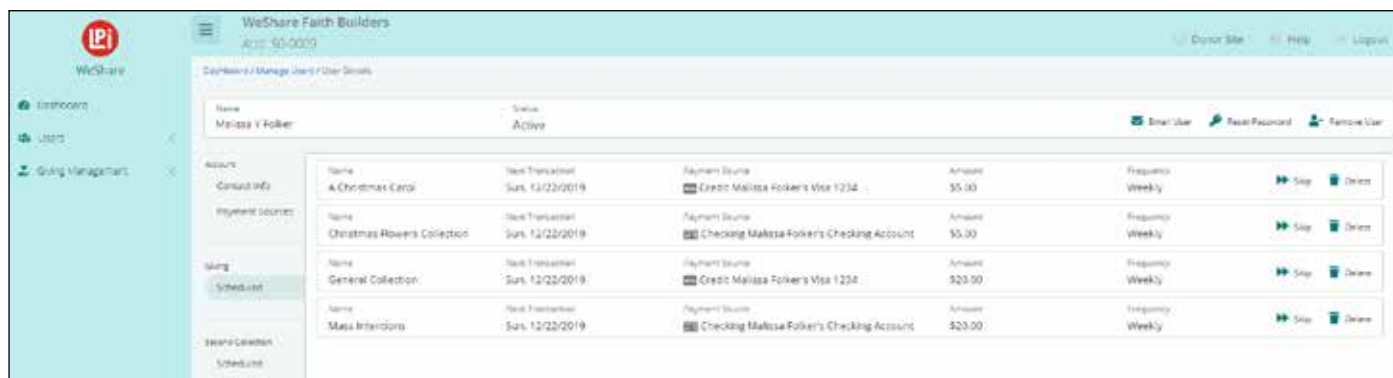
DECEMBER 2019 FEATURE RELEASE FOR WESHARE

Recurring Donations with WeShare Just Got Easier

WeShare is excited to announce two new functions and two new views that have been added to the WeShare Admin Panel, along with a customer request update.

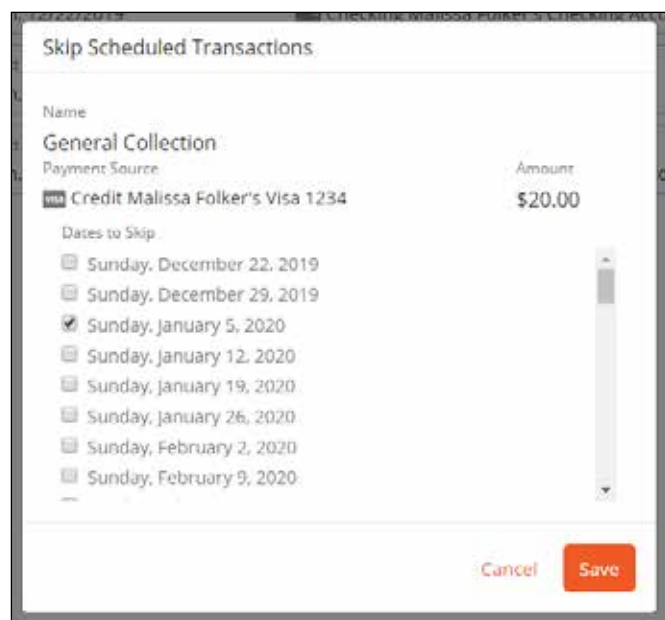
View a Scheduled Recurring Donation

1. Go to Manage Users.
2. Search for a member by first name, last name, or email.
3. Click on their name to open their account information.
4. Click on Scheduled, located under the Giving section.



Skip or Delete a Scheduled Recurring Donation

1. Go to Manage Users.
2. Search for a member by first name, last name, or email.
3. Click on their name to open their account information.
4. Click on Scheduled, located under the Giving section.
5. Click the Skip button to view optional dates set up with that giving opportunity.
6. To delete a recurring donation, click on the Delete button. Enter "Delete" to confirm the deletion.



Edit a Saved Payment Source

1. Go to Manage Users.
2. Search for a member by first name, last name, or email.
3. Click on their name to open their account information.
4. Click on Payment Sources.

When editing a credit card, you can update the following fields:

- Payment Source Name
- Expiration Date
- Cardholder Name
- Address

When editing a checking or savings account, you can update the following fields:

- Payment Source Nickname
- Account Type
- Routing Number
- Account Number
- Account Holder Name

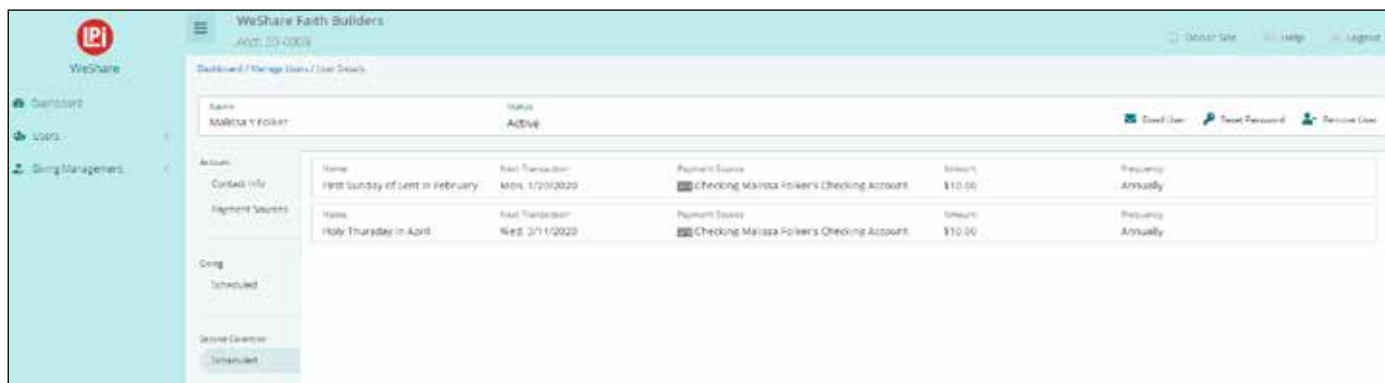
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Added Enhancement:

When looking to make a simple edit with an existing payment source, like updating an expiration date, WeShare will now populate the member's address, city, state, and postal code.

View Second Collections

1. Go to Manage Users.
2. Search for a member by first name, last name, or email.
3. Click on their name to open their account information.
4. Click on Scheduled, located under the Second Collection section.



Customer Request Update

The disable feature within the forms "Select Options" was not working properly. The fix was to correct how this feature determined whether the option was checked.

Upcoming Features:

- Add Payment Source
- Add a Scheduled Recurring Transaction
- Edit a Scheduled Recurring Transaction