Donor Accounts

Users who donate or have donated through a Rallybound site are able to create an account with which they can view transaction history and manage recurring donation plans in their user profile section (see more). Additionally, with their ability to log in, donors have a quicker path to register if they wish to do so (see more).

Administrators can see which donors have accounts and which don't in the Contacts and Donors grid, under the column "Has Account".

Creating an Account

There are various ways through which a donor account can be created. Those include:

1. Post-donation registration
2. Through a link in the donation confirmation email
3. An administrator can create an account for a donor

> ⓘ **Note**
>
> Donors creating accounts is not listed as an activity in the Activity stream.

Post-Donation Registration

For post-donation registration options, please click here.

Confirmation Email Link

By default, a link that allows the donor to create an account is included in the below-listed confirmation emails:

- Donation Confirmation
- Offline Donation Verified
- Ticket Purchased Confirmation
- Recurring Donation Plan Confirmation

When the donor clicks the link in the email, they are directed to a page on which to create a password, at which time their account is created. The user will receive an email confirming their account.

The placement of this link or even whether it should be included in the donation confirmation email can be managed in the Admin Panel, under Email > Auto Responders. The link is represented by the placeholder "Create_Account_Link", which is available in the Misc section of the placeholders popup. Additionally, the placeholder is wrapped in an "'if' statement" to ensure it doesn't appear for donors who already have accounts. When editing the link, it is important to keep it wrapped in its current "'if' statement", which ensures it only appears as applicable. The text block in question is below. To add it to your donation emails you can copy it from here and paste it into the Source view of the email editor.

```
{% if Create_Account_Link -%}Would you like to view and manage your donation
history?
<a href="{{Create_Account_Link}}">Click here to create your account.</a>
<br />
<br />{% endif -%}
```

The text of the donor account created email can be edited in the Auto Responders tab as well, in the Donor Account Creation template.

Additionally, by default, all recurring plan auto responders include a link for the donor to manage their recurring plan. When this link is clicked, if the donor has no account, they are redirected to a page where they are prompted to create one. This link is indicated in the auto responder WYSIWYG editor with the placeholder {{ Recurring_Donation.Recurring_Manage_URL }}.

Administrator Created Accounts

Administrators can create accounts for donors by locating their donor record in the Admin Panel (this can be done either through the search function or in the People > Donors tab), then click "Create Account" at the top. The administrator will be prompted to create a password for the donor, after which the account will be created.

The donor will receive an email confirming that their account has been created, which by default includes a reset-password link, where they should create a new password of their own. This email can be edited in Email > Auto Responders > Admin Created Donor Account.

To create accounts, the administrator requires Edit permission for donors in their security role.

Donor: Test Account

Make Donation   Create Account

Contact Info
User ID: 2456585
Member ID: 2168142
First Name: Test
Last Name: Account
Email: test05@domain.com
Comment:

Edit Contact Info

Statistics
Total Donations: $18.00
Average Donation: $18.00
Number of Donations: 1

Donations

Generate Excel

Date	Amount	Payment Met	Is Verified

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Quicklinks