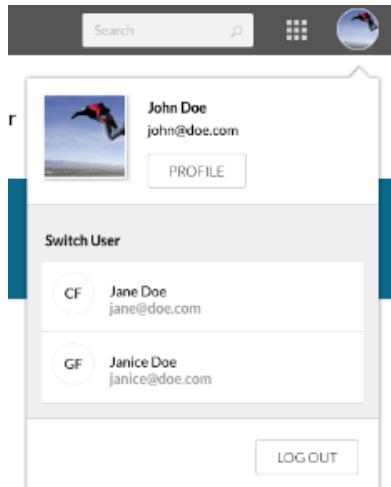


# User Profile

At Rallybound we believe that user information should be easily accessible and managed. To that end, we have designed our templates to present the user information front and center. Users can access their information from the top right of any page on the site. When a user is logged in, two icons will be displayed on the top right: the user's profile image and a grid icon.

## Profile Dropdown

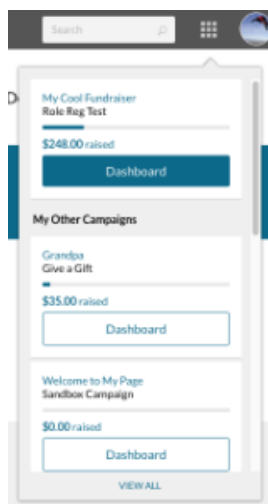
The profile image in the top right drops down to reveal the user's information, a link to the profile section, a list of managed users, and a logout button.



## My Campaigns Dropdown

The grid icon in the top right drops down to reveal the user's campaigns (fundraising pages). At the very top of the list is the page associated with the present campaign site. If the user doesn't have a page on the present site, a "Register for this campaign" button will show. Below that is listed pages associated with other campaign sites, assuming the user created pages on multiple sites.

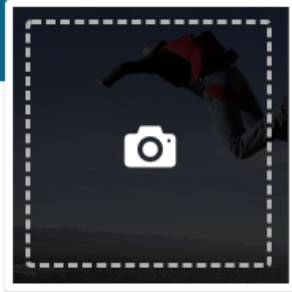
Each campaign card has two links: the title links to the actual fundraising page, while the "Dashboard" button links to the fundraiser dashboard or HQ. The "View all" link below the list directs to the My Campaigns tab in the profile section.



## Profile Section

### Profile Image

Users can upload and edit their profile image on this page using our image uploader.



John Doe

john@doe.com

PROFILE

PAYMENTS

MY CAMPAIGNS

NOTIFICATIONS

## Profile Tab

The **Profile** tab contains the user's personal and contact information, all of which can be edited in this location:

- Email address
- Password
- Name
- Address
- Phone number

To edit name, address, or phone number, simply click the relevant field and it will expand to be editable.

To update name or password, click the "Update" link next to either one. For security purposes, the user's old password is required to make either of these changes. Updating email and password is not available for managed users — to update the email and/or password of multiple users in a shared account, be sure to log in as the primary user ([click here](#) for more information).

Users in a shared account — whether primary or managed, may "break out" of the shared account to manage their account under their own email address. To do this, click the "Manage Own Account" link above the email address field. For security purposes, the user's old password is required to make this change. Primary users who opt to manage their own account need to select another user to become the primary of the shared account.

Account Login MANAGE OWN ACCOUNT

Email Address	sk44@a.com	Update
Password	••••••••	Update

Personal Information

Name	John Doe
Address	123 Main St   Los Angeles, CA 90035   UNITED STATES
Phone	2123434455

**Change email address** ✕

This will change the email address for all users in this account.

Current Password

For security purposes, please enter your password to make this change.

New Email Address

123 Main St | Los Angeles, CA 90035 | UNITED STATES

Account Login MANAGE OWN ACCOUNT

Email Address	sk44@a.com	Update
Password	••••••••	Update

Personal Information

Name	John Doe
Address	123 Main St   Los Angeles, CA 90035   UNITED STATES
Phone	2123434455

**Manage own account** ✕

Change the login information of this user so that it is no longer managed by sk44@a.com. New password is required.

Current Password

For security purposes, please enter your password to make this change.

New Email Address

Choose New Primary User

Please choose another user to be the Primary User of this account.

New Password

Confirm New Password

## Payments Tab

The **Payments** tab displays the user's transaction history and recurring plans for the organization, and payment methods.

In the **Transactions** sub-tab, the user can view historical transaction records, including Donations, Registrations and Purchases (tickets). Users can sort and filter their transactions list using the relevant icons that appear above the grid. Filters include:

- Date range
- Amount
- Transaction type
- Campaign

- Recipient
- Recurring
- Payment method

Details related to each transaction, for example donation recipient and transaction amount breakdown, can be viewed in the detailed transaction record view by clicking on the transaction record. Transactions without a payment (for example, registration with no fee) do not appear in this list.

In the **Recurring Plans** sub-tab, the user can view all recurring plans they may have across the organization. This includes active, paused, and ended plans. The plan record displays amount, original charge date, interval, last charge, amount processed to date, and status, among other detailed information. Additionally, users can pause or end their plan from this interface.

In the **Payment Methods** sub-tab, the user can view their payment methods saved across the organization. Payment methods can be credit cards and (for select processors) bank accounts. Saved payment methods and those in use for recurring plans show up in this interface, while those in use for recommitment do not. Payment methods display the credit card company, account holder name, the last four digits of the account, and expiration date. Payment methods not associated with any active recurring plans may be deleted from this interface.



**Note**

To secure users' information, the Payments tab can only be accessed once the user's email has been verified.

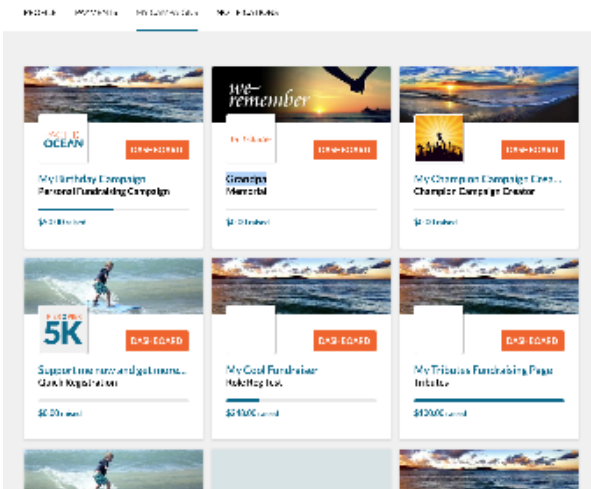
Additionally, each of these sub-tabs will only appear once the user has related records to view. If an organization doesn't have the ability to accept recurring donations configured, the Recurring Plans sub-tab will not appear to any users in that organization. For more on configuring recurring donations, please see [Recurring Donations](#).

The screenshot shows the 'PAYMENTS' tab in a user interface. It features three sub-tabs: 'Transactions', 'Recurring Plans', and 'Payment Methods'. The 'Recurring Plans' sub-tab is active, displaying a table with one entry: a \$17.00 recurring plan on 7/23/2020 with a daily interval, last charged on 1/27/2020, and a status of 'Ended'. Below this, a detailed view of the '\$17.00 Recurring Plan' is shown, including fields for start date (1/21/2020 9:10 AM), interval (Day), last charged (1/27/2020), recipient (Donors II), charges processed (7), total charges (\$119.00), method (Credit Card), and status (Active). On the left, there are sections for 'Transactions' (a table with columns DATE, AMOUNT, INTERVAL, LAST CHARGED, PROCESSED, STATUS), 'Recurring Plans', and 'Payment Methods' (a table with columns ID, DATE, AMOUNT, INTERVAL, LAST CHARGED, PROCESSED, STATUS).

## Campaigns Tab

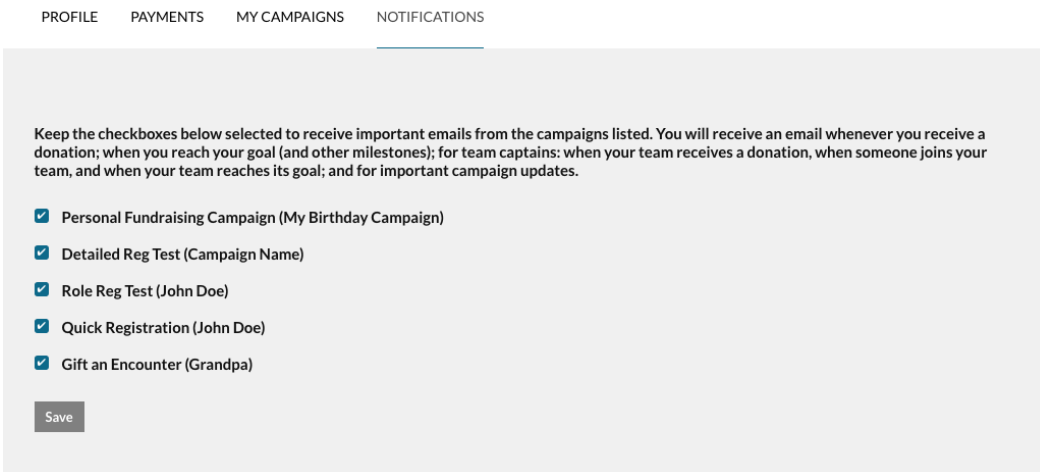
The **Campaigns** tab displays campaign cards for each of the campaigns (fundraising pages) the user has created on the organization. The user can navigate to any of their campaigns from this location, much like the My Campaigns dropdown.

Note that the text below the title represents the campaign name. If two campaigns have the same name, it may be difficult for user's to differentiate between their pages on those campaigns. We recommend naming campaigns in a way that will minimize confusion. Also note that pages on delisted campaigns will also appear in this section. If you would like to ensure a campaign does not appear here, that campaign should be ended in the admin. [See more on ending campaigns here.](#)



## Notifications Tab

The **Notifications** tab allows the user to determine whether they would like to receive notifications from each of the campaigns in which they are participating. If a user indicates that they do not want to receive communications for a given campaign, they will be removed from Rallybound's email list and will not receive any "Admin Emails" or "Auto-Responders" (which includes registration confirmation and donation receipts) from that campaign.



A Video Tutorial for user profile can be viewed [here](#).