

Recurring DMS Payments: Checking for Soon-to-Expire Credit Cards

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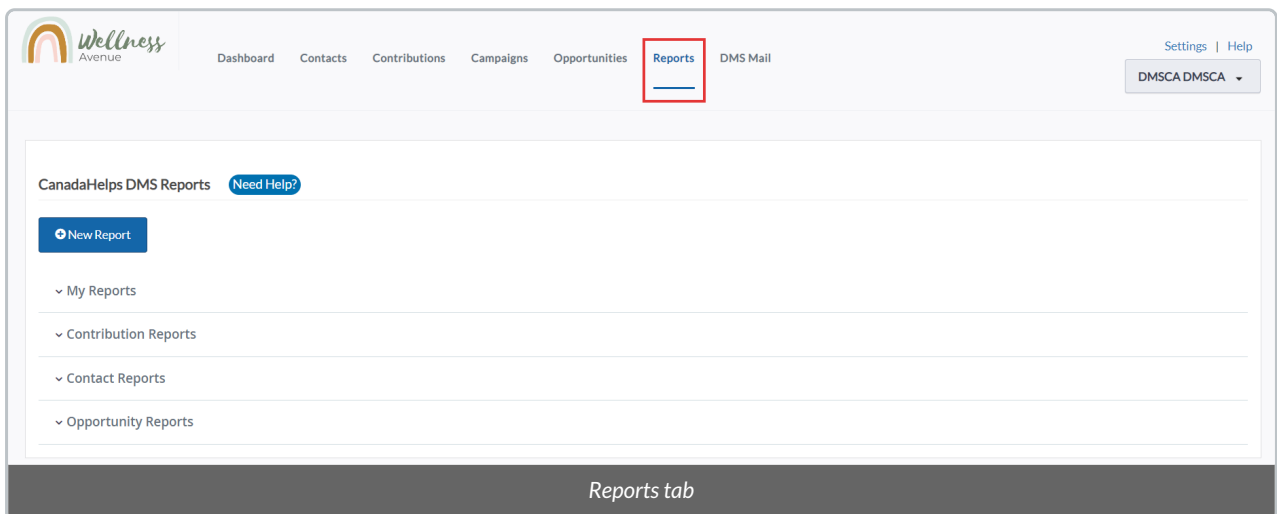
Donor Management System

Because credit card expiry dates don't automatically update for [DMS Live credit card payments](#), you'll need to [update the billing details manually](#) for any expired credit cards.

To help you identify which recurring [DMS Live payments](#) have credit cards that will be expiring soon, we've created a Report just for you.

Pulling a Soon-to-Expire Credit Card Report

1. Visit the *Reports* tab



2. Select *Contributions Reports* to reveal this section, and then select *Custom Contribution Reports*

Wellness Avenue

Dashboard | Contacts | Contributions | Campaigns | Opportunities | **Reports** | DMS Mail

Settings | Help

DMSCA DMSCA

CanadaHelps DMS Reports [Need Help?](#)

[New Report](#)

- My Reports
 - Contribution Reports**
 - Contribution History by Campaign
 - Contribution History by Fund
 - Contribution History by GL Account
 - Custom Contribution Reports**
 - Contribution History by Source (Summary) Total amounts raised by Source [View Results](#) [More ?](#)
 - Recurring Contributions (Summary) Total amounts raised by Recurring Contributions with individual Contribution information [View Results](#) [More ?](#)

Custom Contribution Reports

3. From the new list that will appear, select the report entitled **iATS Payments - Recurring Contributions Report**

Custom Contribution Reports

Contribution History by Campaign (Monthly) (copy created by Charity Admin on Sep 7th, 2022 1:01 PM)	Extended Report - Contribution Pivot Chart	View Results More ?
Contribution History by Payment Method (Summary)	Overview of contributions by Payment Method	View Results More ?
Fiscal Year to Date	Total amounts raised this fiscal year by month	View Results More ?
Fiscal Year to Date (copy created by John Rainan on Dec 31st, 2021 12:18 PM)		View Results More ?
Last Year inc. Today	Total amounts raised last calendar year by quarters	View Results More ?
Top contributors	Top contributors	View Results More ?
top donors	Provides a list of the top donors during a time period you define. You can include as many donors as you want (for example, top 100 of your donors).	View Results More ?
GL Account & Payment Method Reconciliation Report (Full)	Shows Bookkeeping Transactions Report	View Results More ?
JKO Currency Report	Total amounts raised with bookkeeping transactions information	View Results More ?
iATS Payments - Recurring Contributions Report		View Results More ?
SYBNT	Contributors who gave 'Some Year, But Not This'	View Results More ?

iATS Payments Report

4. This will bring you to a section where you can customize your new report.

5. Under the **Column** section, ensure the column "Expiry Date" is checked off.

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iATS Payments - Recurring Contributions Report

Columns | Sorting | Filters | Title and Format | Email Delivery | Access

- First Name
- Contact ID
- Email
- Supplementary Address Field 2
- Country
- [x]Series ID
- customer code
- [x]Series ID
- Amount
- Frequency unit
- Modified Date
- Failure Count
- Last Name
- Phone
- City
- Expiry Date
- Series ID
- Fund
- Installments
- Cancel Date
- Failure Retry Date
- Prefix
- Address
- Province
- Invoice ID
- Donation Status
- Start Date
- Next Scheduled Contribution Date
- Payment Processor
- Contact Name
- Supplementary Address Field 1
- Postal Code
- Currency
- Frequency interval
- Create Date
- Cycle Day

Summary Fields

Privacy Email opt-in

[Refresh results](#)

Expiry Date

6. Next, under the **Filters** tab, select the drop-down **Donation status** value "is not empty (Null)"

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iATS Payments - Recurring Contributions Report

Columns | Sorting | **Filters** | Title and Format | Email Delivery | Access

Total Amount: Is less than or equal to

Expiry Date: Next 60 days including

Donation Status: Is not empty (Null)

Payment Processor: Is one of

Currency: Is one of

Fund: Is one of

Frequency Unit: Is one of

Next Scheduled Contribution Date: Any

Donation Status Filter

7. Select the **Refresh Results** button to generate your report

8. This report will list any recurring Live contributions that have a credit card expiry date scheduled within the next 60 days

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Dashboard Contacts Contributions Campaigns Opportunities Reports DMAS Mail

Settings Help
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IATS Payments - Recurring Contributions Report

Columns Sorting Filters Title and Format Email Delivery Access

Refresh results

⊕ Actions + Add Contacts to Group

Expiry Date Between Thursday 2 March 2023, 12:00AM and Sunday 30 April 2023, 11:59PM

Donation Status Is not empty (N/A)

Contact Name	Contribution ID#	Amount - To Date	Customer Code	Expiry Date	Series ID	Amount	Fund	Frequency Interval	Frequency Unit	Installments	Start Date	Next Scheduled Contribution Date	Payment Processor
Noboru K	1574, 1345	2.00	noboru@canadahelp.org:54ba7744468bb5684593010583651848:16049120	2023-03-31 00:00:00	14	1.00	2023	1	month	12	2023-02-01 01:13:00	2023-04-01 01:52:01	Credit card

Row(s) Listed 1

Report

What's Next?

Using this report, you can reach out to any Contacts who have a recurring Live contribution with a credit card that is set to expire soon, and, once you receive their updated billing information, you can **update their billing details manually**.