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

Last Modified on 05/30/2024 3:03 pm EDT
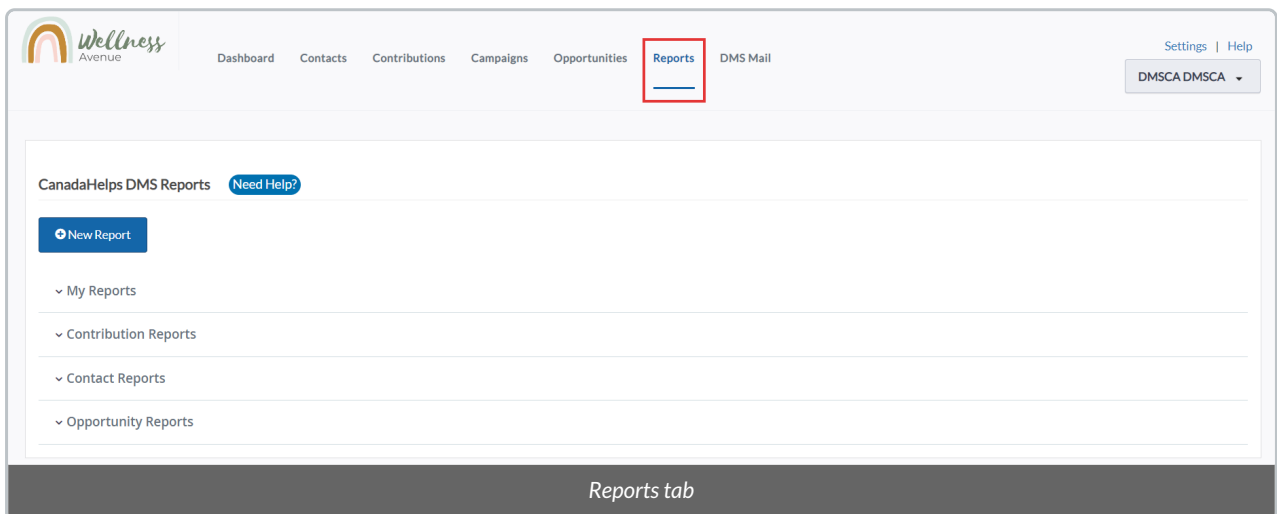
Because credit card expiry dates don't automatically update for DMS Live credit card payments, you'll need to update the billing details manually for any expired credit cards.

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**

Reports tab

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

Custom Contribution Reports

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

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**.

Expiry Date

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

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**

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**.