

Blackbaud Merchant Services™ Credit Card Updater Service in Blackbaud CRM



Sustaining Your Mission

Sustainers are the financial lifeblood of your nonprofit. They provide consistent monthly revenue that funds your mission, both now and in the future. To identify these donors and keep them engaged, you need a constituent relationship management (CRM) solution that will help you build stronger, long-term relationships with your supporters.

Blackbaud CRM provides all of the tools you need to improve fundraising through sustained giving and pledges. These tools allow you to transform one-time donors into recurring givers. They also make it possible to keep constituent information—including payment card numbers and expiration dates—current for recurring gifts and pledge payments.

Automatic Updates of Credit Card Data

With data breaches on the rise and the U.S. adoption of EMV, banks are issuing new payment cards every day. This impacts credit and debit card information for your sustaining donors, making it nearly impossible to avoid a decline resulting from outdated card information. It also puts a strain on your staff to contact these supporters for new card data, which can lead to the gift being cancelled.

Blackbaud CRM clients using Blackbaud Merchant Services can now take advantage of Credit Card Updater. When your organization subscribes to this value-added service, credit card data for your sustaining gifts is analyzed each month to identify expired or out-of-date card numbers and expiration dates. Blackbaud partners with [Visa® Account Updater](#), [MasterCard® Automatic Billing Updater](#), and [Discover® Network Account Updater](#) to deliver the service.

When available, new card data is updated automatically in Blackbaud CRM, minimizing the loss of a recurring gift and saving your staff significant time on donor outreach and data entry.

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How It Works

Once enabled, Blackbaud CRM runs a nightly business process that registers and de-registers cards based on the following:

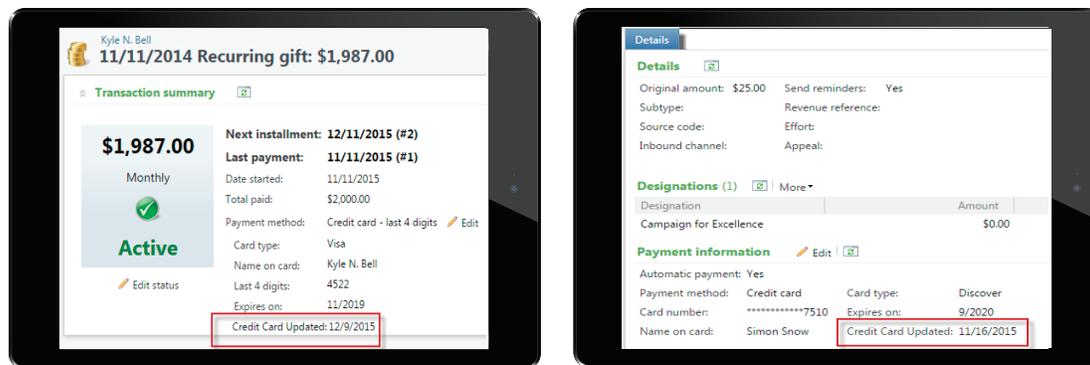
Cards Registered

- Recurring gifts with Active, Held, or Lapsed statuses
- Pledges paid in installments with a non-zero balance
- Membership installment plans with a non-zero balance

Cards De-registered

- A credit card manually updated with all new card information
- A recurring gift status changed to Terminated or Canceled
- A pledge or membership installment plan balance changed to zero

Each month, Blackbaud Merchant Services analyzes the cards registered by the business process. If Credit Card Updater determines that new card data exists, Blackbaud Merchant Services updates Blackbaud CRM while still retaining the original payment details. These updates appear in the Transaction summary section of the recurring gift record or the Details tab of the pledge or membership installment plan. When no update is available, the Credit Card Updated field does not display.



Using the Credit Card Updates Query, you can track any changes made by Credit Card Updater and prioritize outreach to donors whose card-issuing bank does not participate in the service. And, when you subscribe to email notifications from within the Blackbaud Merchant Services web portal, you will be notified when your account has received updates.

Credit Card Updater works with Visa®, MasterCard®, and Discover® cards from participating financial institutions (often large national banks). Cards issued by smaller, local banks and credit unions may not receive updates. In addition, American Express® cards, as well as cards issued by banks outside of the US, are not included in the service at this time. There is a nominal fee for each updated card.

➤ To learn more about Credit Card Updater, including what your annual resource savings would be if implemented, email bbms@blackbaud.com or visit www.blackbaud.com/bbms.