## Enter MobilePay Credit Card Transactions

Card present transactions may be taken on mobile devices using Blackbaud MobilePay. These transactions are processed through Blackbaud Merchant Services and then must be manually imported or entered into Raiser’s Edge as follows.

**To enter MobilePay credit card transactions:**

1. Log into [Blackbaud Merchant Services](https://bbms.blackbaud.com/).
2. Go to Transactions > **Transactions Search**.
3. Enter the Date the card present swipes were taken in the **Start and End date** fields and check the **Mobile transactions only** checkbox. Click **Search**.
4. Go to Export > **Excel spreadsheet** and save the resulting file.
5. Donors and Donations can be entered into Raiser’s Edge by following the Enter Gifts Using a Batch Template instructions or through Import by the database administrator.
   1. To match donors with existing Constituent Records or create new Constituent Records, follow the instructions in the [Constituent Data Management Policy and Procedure](file:///\\HFHMD-Main\Work%20Data\Office\ADMINISTRATION\RAISER'S%20EDGE\Policy%20and%20Procedure\RE_Constituent%20Data%20Management_PP.docx) or use the BBMS Donor Import.
      1. If a donor in the spreadsheet does NOT have an address OR email, apply the gift to the Anonymous Donations record and add the Account holder name to a Gift Notes Notepad on the gift record.
   2. Enter the following gift information in Batch (Load from existing MobilePay template) or through Import (BBMS Gift Import):

|  |  |
| --- | --- |
| Gift field | Value |
| Gift Type | Cash |
| Gift Date | From “Date” column of spreadsheet |
| Amount | From “Gross amount” column of spreadsheet |
| Campaign | Per fundraising staff |
| Fund | Per fundraising staff |
| Appeal | Per fundraising staff |
| Pay method | Credit Card |
| EFT? | No |
| Card type | From “Account type” column in spreadsheet |
| Cardholder | From “Account holder” column in spreadsheet |
| Card no. | From “Last 4” column in spreadsheet |
| Card exp. | From “Expiry” column in spreadsheet |
| Auth. Code | From “Result” column in spreadsheet |
| Reference | From “Comment” column in spreadsheet |
| Letter | Per fundraising staff; NO TY Letter if Constituent has no contact information |
| Acknowledged | “Acknowledged” if donor included email address; “Not Acknowledged” if donor included mailing address but not email; “Do Not Acknowledge” if donor supplied no contact information. |
| Acknowledged Date | From “Date” column of spreadsheet if constituent included email address; otherwise leave blank |
| Gift ID | From “Transaction ID” column in spreadsheet |
| GL post status | Not Posted |
| GL post date | From “Date” column of spreadsheet |
| Class Attribute | 12b – Fundraising |
| Data Source Attribute | MobilePay App |