

Donor Data Migration Guide



Migrating donor payment information is critical when transitioning to a new payment processor. This guide outlines the steps to successfully migrate your donor payment data from your current payment processor to iATS Payments by Deluxe.

Open a Case with the iATS Customer Care Team

- + Once you've opened an account with iATS Payments, contact **iATS Customer Care** to initiate the migration process by filling out iATS' intake form. You'll receive a case number for tracking purposes.
- + Share key data points that will help our migrations team, including:
 - the name of the processor you're migrating from as well as your primary contact there
 - a list of the donor payment records you need to migrate
 - encrypted payment methods (credit card or ACH)
 - whether the data will be transferred by OneDrive or by SFTP.
 - who will hold the recurring donation schedule

Request Customer Tokens from Your Current Payment Processor

- + Contact your current payment processor to request an export of your donor payment data (either in CSV or Excel format). The data will be sent directly to iATS.
- + iATS will receive the exported data from your current provider and will review it with you for completeness and accuracy.

iATS Payments Uploads Data to Your New Account

- + The iATS Customer Care team will verify and import the data into your new iATS Payments account.
- + Confirm that all customer payment information has been correctly migrated.



By following these steps, you can effectively migrate your customer payment information to iATS Payments. Should you encounter any issues or require assistance, the iATS Customer Care team is available to support you throughout the process.



Data Migration Form

We really appreciate you taking the time to fill out this data migration form to let us know your specific requirements.

Case Number

Client Code Contact Name

Organization *

Contact Email *

What is your "Go-Live" date?

Are you migrating 50 or more donors? *

Yes

No

How many donors are you migrating?