

QUICK START CHECKLIST

Set Up an Account with Blackbaud Merchant Services™

Blackbaud Merchant Services™ is ready to use with your Blackbaud software. As an end-to-end solution designed specifically for non-profit organisations, it simplifies payment processing, saving you and your staff time. Read our Quick Start Checklist to find out what information you will need to gather in order to set up your Blackbaud Merchant Services (BBMS) account.

Primary Contact Information

To create your account, you must have the role of 'Primary Contact' or 'Site Administrator' at your organisation for each Blackbaud product that you plan to connect to **Blackbaud Merchant Services**.

- Site ID _____
- Email address _____

Statement Descriptor to Appear on Supporters' Credit Card Statements

- Organisation name (max 18 characters) _____
- Phone number _____

Login Credentials

- Username and password for your **Blackbaud Payment Service** account
- If you're uncertain whether you have a **Blackbaud Payment Service** account or don't know your login credentials, please contact Payment Services Support via one of these methods:

- [Live Chat](#)
- [Case Central](#) - When you create a case, select your product and then 'Credit Card Processing'
- Phone - 0845 658 8500

- Usernames and passwords for Blackbaud programmes to use **BBMS**

System Requirements

Browser for web portal:

- Internet Explorer 8 or later
- Latest version of Chrome, Firefox or Safari

Blackbaud Programme:

- Altru®
- Blackbaud NetCommunity™ 6.10 or higher
- Blackbaud CRM™ 2.0 or higher
- Blackbaud Online Express™
- eTapestry®
- Luminate Online™
- Raiser's Edge™ 7.91.5056 or higher
- Raiser's Edge NXT™

Contact Support ➤

Bank Account Information for Disbursements from Processed Transactions

- Country _____
- Currency _____
- Bank name _____
- Routing number from check _____
- Account number _____
- Account type (Checking / Savings) _____
- Tax ID number (EIN / CAR / TIN / ITIN) _____
- Account holder name associated with tax ID _____

Bank Account Validation

To validate your account and authenticate your organisation, please email the following information to bbmsaccountvalidation@blackbaud.com:

- One of the following is required in order to verify your ownership of the account and its routing number, account number and account holder name:
 - A voided cheque, pre-printed with your organisation's legal name and address
 - A bank statement from the account, including all pages
 - A bank letter from your bank, on its official letterhead and signed by an authorised bank officer
- The full names of all members of the Board of Directors at your organisation
- The name, title and address of a principal executive — preferably the Chief Executive Officer (CEO) or Chief Financial Officer (CFO) — at your organisation, and a photocopy of their government-issued identification such as a driver's license or passport.

If we do not receive the required information or are unable to validate your bank account, your BBMS account will be declined and you will be unable to process transactions or receive disbursements from that account.

Additional Information for Processing USD

When processing US dollars, American Express® requires that we collect information about a principal employee with signatory authority at your organisation.

- Full name _____
- Home address (not a PO Box) _____
- Date of birth or Social Security number _____

To create accounts with Blackbaud Merchant Services and the Blackbaud Payment Service, visit <https://bbms.blackbaud.com/signup>.

In accordance with payment services regulations and the Office of Foreign Assets Control (OFAC), **Blackbaud Merchant Services** automatically suspends disbursements to a new bank account pending its validation.

Contact Support ▶

