

Set Up an Account with Blackbaud Merchant Services

A Quick Start Checklist

Before we assist you with setting up your **Blackbaud Merchant Services** account, please collect the following information. You will not need to provide this information to anyone at Blackbaud, but you will enter the data during provisioning on your account via our [secure online portal](#).

Primary Contact Information

To create your account, you must have the role of "Organization admin" at your organization for each Blackbaud product that you plan to connect to **Blackbaud Merchant Services**.

- Site ID _____
- Email address _____
- Organizational website address _____

Statement Descriptor to Appear on Supporters' Credit Card Statements

- Organization name (up to 18 characters) _____
- Phone number _____
- Email address _____

Login Credentials

- User name and password for your **Blackbaud Payment Service** account (if already set up)

If you're uncertain whether you have a **Blackbaud Payment Service** account or don't know your login credentials, review [KB 97386: How do I contact Customer Support?](#)

- User names and passwords for Blackbaud programs to use **Blackbaud Merchant Services**

System Requirements

Browser for web portal:

- *Internet Explorer 11 or later*
- *Latest version of Safari, Firefox, or Chrome*

Blackbaud program:

- *Blackbaud Altru®*
- *Blackbaud NetCommunity™ 6.10 or higher*
- *Blackbaud Internet Solutions™*
- *Blackbaud eTapestry™*
- *Blackbaud CRM™ 2.0 or higher*
- *Blackbaud Online Express™*
- *Blackbaud Luminare Online™*
- *Blackbaud Enrollment Management System™*
- *Blackbaud School Website System™*
- *Blackbaud Raiser's Edge™ 7.91.5056 or higher*
- *Blackbaud Raiser's Edge NXT™*
- *Blackbaud Peer-to-Peer Fundraising™*

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Bank Account Information for Disbursements from Processed Transactions

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

Average Amounts

- Average transaction amount _____
- Average processing amount per month _____

Principal Employee Information

For United States-based nonprofits, we require the following information.

- Full name _____
- Home address (not a Post Office box) _____
- Date of birth **and** Social Security number* _____

*The [Financial Crimes Enforcement Network](#) (FinCEN), a bureau of the U.S. Department of Treasury, requires that we collect this information.

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

Bank Account Validation

- To validate your account and authenticate your organization, please email **one** of the following to bbmsaccountvalidation@blackbaud.com — or fax it to +1 (843) 216-6119, ATTN: BBMS Account Validation — to verify your ownership of the account and its routing number, account number, and account holder name:
 - A voided check, pre-printed with your organization's legal name and address
 - A bank statement from the account, including all pages

► Accounts that process Canadian dollars (CAD), euros (EUR), or pounds sterling (GBP) require additional information. For details, visit www.blackbaud.com/bbmsaccountvalidation.

Blackbaud will deposit funds and debit your bank account for the full amount of any negative or debit balances (including any chargebacks and reversals). Failure of an attempted debit will place all payouts on hold so be sure your bank allows both deposits and debits from the [appropriate merchant ACH IDs](#).

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.