

# Getting Started with **Blackbaud MobilePay™**

Using the **Blackbaud MobilePay** application and reader, you can accept and process credit card transactions through your iPhone®, iPad®, or Android™ phone or tablet. You can download **Blackbaud MobilePay** to your device from the Apple App Store® or Google Play™ and never miss a payment again.

Supported operating systems:

- Android 4.4 and higher, no "rooting"
- iOS 11 and higher, no "jailbreak"

To accept transactions, you can manually enter credit card information or use a card reader provided by Blackbaud to swipe and read credit cards' magnetic stripes. To process credit cards, the app requires accounts with the **Blackbaud Payment Service™** and **Blackbaud Merchant Services**. With **Blackbaud Merchant Services**, you pay the same low rate on every transaction, regardless of the credit card type used – MasterCard®, Visa®, Discover®, or American Express® – with no hidden fees or mobile processing expenses.

To keep credit card data secure, the app uses **Blackbaud Checkout** (formerly **Blackbaud Secure Payments**) and **Blackbaud Payment Service** to encrypt sensitive information and remove the risks associated with the storage of credit card information. **Blackbaud MobilePay** uses **Blackbaud Checkout** to securely submit encrypted credit card data to the **Blackbaud Payment Service**. Additionally, to secure payment information, **Blackbaud MobilePay** automatically times out after 15 minutes of inactivity during a transaction, and after 60 minutes with no transactions.

**Note:** Credit card data swiped using **Blackbaud MobilePay** is never stored on your phone or tablet.

**Note:** If you are using the **Blackbaud MobilePay** integration with **Luminate Online** or **TeamRaiser**, some of this guide is not applicable to you. To learn how to integrate a card reader with your mobile device, see **Blackbaud MobilePay Card Reader** on page 3. To learn how to process payments from your mobile device, see **Mobile Payments** on page 4.

## **Blackbaud Merchant Services and Blackbaud MobilePay**

1. **Set up an account with Blackbaud Merchant Services:** **Blackbaud MobilePay** works seamlessly with **Blackbaud Merchant Services**, a complete payment processing solution compliant with the Payment Card Industry Data Security Standard (PCI DSS). If you do not currently have an account, contact [bbms@blackbaud.com](mailto:bbms@blackbaud.com) to sign up. You must have the role of "Primary Contact" or "Site Administrator" to create your organization's account. Once created, you can log into the Blackbaud Merchant Services web portal to complete the following steps.
2. **Configure email acknowledgements:** To configure email acknowledgements for **Blackbaud MobilePay**

transactions, select **Email notifications** under the *Welcome* menu in the web portal. On the Email Notifications page, select **Edit** next to **Mobile transactions** to specify the frequency and recipients to use with acknowledgements for payments and refunds.

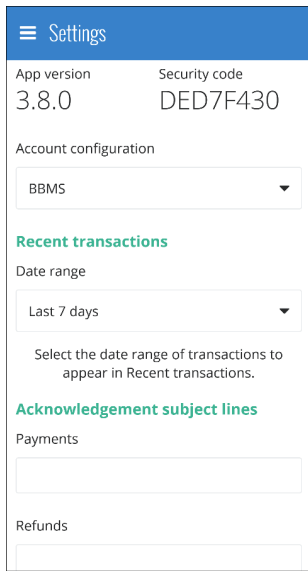
3. **Approve new mobile phones or tablets with *Blackbaud Merchant Services*:** After users install the app on their your iOS or Android mobile phone or tablet, they enter their login and give the device a unique name. While they wait for the device to be approved, users have 30 minutes to process transactions right away, although they cannot process refunds. All devices appear on the web portal under *Account Management*, **Mobile devices**. On this page, users with rights to manage mobile devices can review pending devices to approve or deny, as well as suspend and reinstate devices as necessary. Suspending a device can be helpful if it has been lost or stolen, or it is not in use at the moment but is likely to be used at a later time.
4. **Manage transactions:** From the web portal, you can view and manage the credit card transactions accepted through *Blackbaud MobilePay*. To search for and view records of mobile transactions in the web portal, select **Credit cards** and then **Mobile transactions only** on the Transaction Search page.
  - From a transaction's record, you can reattempt delivery of its acknowledgement if necessary, such as if the incorrect email address was originally used. When you resend an acknowledgement, you can adjust the recipient email address, 'Reply to' email address, and subject line as necessary.

- From the record of a mobile transaction or the results of a transaction search, you can refund all or part of its amount to the card holder.

## Mobile App Settings

In *Blackbaud MobilePay*, select Settings on the menu to view the installed version of the app and the security code assigned your mobile phone or tablet by *Blackbaud Merchant Services*.

**Note:** Blackbaud supports versions 3.7 and 3.8 of the *Blackbaud MobilePay* app.

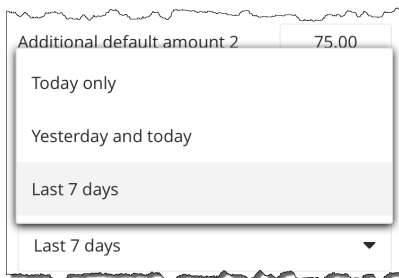


You can also configure various settings of the app.

- **Account configuration.** Select which configuration of your Blackbaud Merchant Services account to use with the app.
- **Acknowledgement subject lines.** Enter the subject lines to use with email acknowledgements sent for payments and refunds processed through the app.
- **Payment defaults.** Select whether to automatically expand the fields for a billing address when entering transactions, enter a default comment, and set default amounts for transactions processed through the app.

**Note:** The amount in the **Default amount** field automatically appears for all new transactions. Additional default amounts appear as buttons on the keypad.

- **Recent transactions.** Select the date range—the current day, the previous and current days, or the last seven days—of the transactions to appear as "recent" and in transaction searches.



## ***Blackbaud MobilePay*** Card Reader

To quickly enter credit card information, you can use a fully-encrypted card reader provided by Blackbaud to swipe and read the credit card's magnetic stripe. You can use the same card reader with an iPhone®, iPad®, or

Android™ phone or tablet. To use the card reader with **Blackbaud MobilePay**, plug the reader fully into the audio headset jack of your mobile phone or tablet.

If the card reader does not work:

- Verify whether the mobile phone or tablet has any Bluetooth feature turned off and that the volume is not muted. If you are using an Apple® product, ensure your microphone is enabled by going to **Settings, Privacy** and then selecting **Microphone** to confirm **Blackbaud MobilePay** is on.
- Run the credit card's complete magnetic stripe through the card reader, and verify the magnetic stripe faces the correct direction. When you look at the front of the card reader, you should also see the magnetic stripe.
- Make sure you are on the **Card swipe** screen when you run the credit card through the reader.
- If your mobile phone or tablet has a protective sleeve, make sure it allows the card reader to plug fully into the audio jack.
- If your mobile phone or tablet has an inset audio jack that prevents a successful connection of the card reader, use a 3.5mm four-conductor extension cord to connect the card reader to the mobile phone or tablet. To successfully use an extension cord, you must plug the cord into the card reader before you plug into the mobile device.

**Note:** For additional troubleshooting information, refer to [Blackbaud MobilePay Frequently Asked Questions](#).

## Mobile Payments

With **Blackbaud MobilePay**, you can quickly take credit card payments using your mobile phone or tablet.

1. Enter the amount of the payment and select **Enter payment**.

**Note:** If you are using the integration with **Luminate Online** or **TeamRaiser**, the payment amount is already populated for you. The app automatically takes you to the next step.

2. Swipe the credit card through the card reader or manually enter the credit card information, and select **Continue**.
3. Have the card holder sign for the payment with a finger or stylus.
4. Enter the email address or notes for the acknowledgement, and any billing address information, and select **Pay Now**.

## Processing a Refund

You can refund recently accepted payments directly through the application.

1. On the menu, select **Recent transactions** and then search for and select the payment to refund.
2. Enter the amount to refund, as well as any email address and comments for an acknowledgement of the refund, and select **Continue**.
3. Verify the refund and acknowledgement information and select **Refund now**.