

Set Up an Account with Blackbaud Merchant Services™

A Quick Start Checklist

Before you start with **Blackbaud Merchant Services**, please prepare and keep the following information for your reference as you set up your account. To set up an account, you must have the role of Blackbaud's primary contact at your organization.

Primary Contact Information

- Site ID _____
- Email address _____

Statement Descriptor to Appear on Supporters' Credit Card Statements

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

Login Credentials

- User name and password for your **Blackbaud Payment Service** account (if already set up)
- User names and passwords for Blackbaud programs to use **Blackbaud Merchant Services**

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 _____

System Requirements

Browser for web portal:

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

Blackbaud program:

- Altru®
- Blackbaud NetCommunity™ 6.10 or higher
- Blackbaud CRM™ 2.0 or higher
- eTapestry®
- Luminate Online™
- OnBoard®
- OnMessage®
- The Patron Edge® 3.402.11 or higher
- The Patron Edge® Online 3.4.13 or higher
- The Raiser's Edge® 7.91.5056 or higher

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

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
 - A bank letter from your bank, on its official letterhead and signed by an authorized bank officer

Principal Employee Information

For United States-based nonprofits, American Express® requires that we collect information about a principal employee with signatory authority at your organization. **Blackbaud will provide a link to a secure web form so you can submit this information about the employee:**

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

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

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.