

# 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 of 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 \_\_\_\_\_

### 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>.

## System requirements

### Browser for web portal

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

### Blackbaud program

- Blackbaud Altru®
- Blackbaud Church Management™
- Blackbaud CRM™ 2.0 or higher
- Blackbaud eTapestry®
- Blackbaud Enrollment Management System™
- Blackbaud Internet Solutions™
- Blackbaud Luminate Online®
- Blackbaud NetCommunity™ 6.10 or higher
- Blackbaud Online Express™
- Blackbaud Peer-to-Peer Fundraising™, powered by JustGiving™
- Blackbaud Raiser's Edge® 7.91.5056 or higher
- Blackbaud Raiser's Edge NXT®
- Blackbaud School Website System™

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## Average amounts

Average transaction amount \_\_\_\_\_

Average processing amount per month \_\_\_\_\_

## Bank account information for disbursements from processed transactions

Country \_\_\_\_\_

Currency \_\_\_\_\_

Bank name \_\_\_\_\_

Routing number and account number **OR**  
IBAN and governmental tax ID number \_\_\_\_\_

Account number \_\_\_\_\_

Account type (Checking / Savings) \_\_\_\_\_

Federal tax ID number (EIN / CAR / TIN / ITIN) \_\_\_\_\_

Account holder name associated with tax ID \_\_\_\_\_

## Bank account validation

To validate your account, please email **one** of the following to <https://mft-us.blackbaud.com/Desktop/Dropbox/Create/?toemail=BBMSAccountValidation@blackbaud.com>:

- 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, signed by a bank officer, including the account holder name, account number, and routing number.

## 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

► Accounts that process Canadian dollars (CAD), euros (EUR), or pounds sterling (GBP) require additional information. For additional information regarding validation requirements, visit <https://www.blackbaud.com/info/bbms/bbms-account-validation>.

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 for the protection of your organization, Blackbaud Merchant Services automatically suspends disbursements to a new bank account pending its validation.