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Getting Started with Blackbaud Merchant Services



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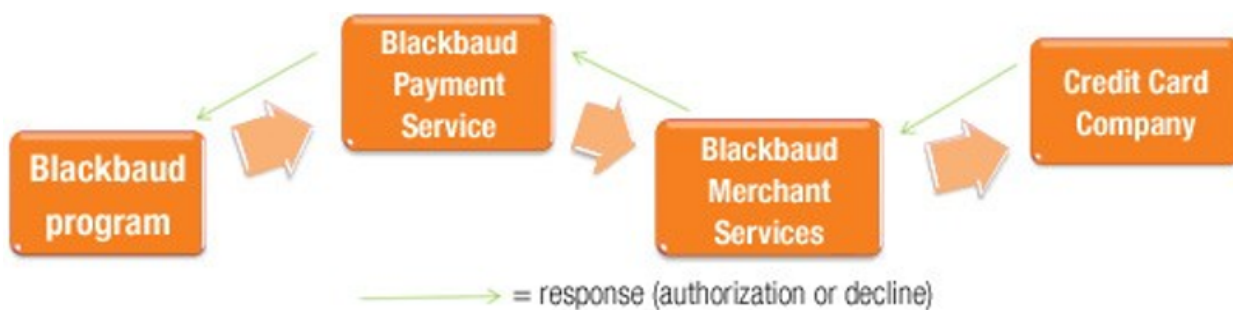
With **Blackbaud Payment Service (BBPS)** and **Blackbaud Merchant Services (BBMS)**, you can securely process credit card transactions through your Blackbaud program. From the Blackbaud website, you can set up accounts with both **BBPS** and **BBMS**. When you create your merchant account, it automatically appears in the **BBMS** web portal and in your Blackbaud programs. After you set up your account, you can configure your account settings and manage transaction processing through the web portal.

Blackbaud Payment Service

To ensure compliance with the Payment Card Industry Data Security Standards (PCI DSS) and Payment Application Data Security Standards (PA DSS), we offer **BBPS**. **BBPS** integrates with your program to store sensitive credit card and merchant account information in a secure environment. In your program's database, credit card numbers are replaced with reference tokens. When you process credit card transactions, **BBPS** uses the reference tokens to match the transactions to the applicable credit card information.

Blackbaud Merchant Service

To securely process your credit card transactions, **BBMS** receives credit card and payment amount information processed through your program and **BBPS**. **BBMS** then uses this information to process the transactions with the credit card companies and disburse the funds into your bank account. To manage your transactions, you can access an online web portal to run reports, refund transactions, and process chargeback requests.



Verify the Connection to Blackbaud Merchant Services

> 1. Verify your account.

In the **BBMS** web portal, verify your account information.

1. Visit <https://bbms.blackbaud.com> and use the credentials created for your **BBMS** account to log into the web portal.

2. Verify the information entered for the bank account to receive disbursements from processed credit card transactions. To verify the information, click **Account Management, Disbursement information**.
3. Verify your contact information and the descriptors that appear on credit card statements for transactions processed by your organization. To verify the information, click **Account Management, Contact details**.

Note: If a donor views transaction history for the credit card account online within the first 24 hours, the transaction may appear as "NONPROFIT(pending)" rather than your organization's descriptor, depending on the card issuer.

4. To verify the connection to your **BBPS** account, click **Account Management, Account configurations**. If your account is not connected, the Blackbaud Payment Service Credentials page appears instead of the Account Configurations page. To connect to your **BBPS** account, click **Edit**, enter the credentials for your account, test the connection, and then click **Save**.

> 2. Process a test transaction.

To test the connection to **BBMS**, create a \$2.00 transaction through your online donation page or Blackbaud program. For information about how to process credit cards through your program, refer to its user guides at www.blackbaud.com/support/guides/guides.aspx.

Note: When you process test transactions, you will be charged the standard processing fee for each transaction.

3. Verify the test transaction.

In the web portal, search for the transaction to verify it processed correctly. To search for the test transaction, click **Transactions, Transaction search**. Next, enter the search criteria, and click **Search**.

Note: For an overview of the features available to manage transactions and your account through the web portal, see [Blackbaud Merchant Services Portal Features Overview](#).

Altru

With **Blackbaud Merchant Services (BBMS)** and the **Blackbaud Payment Service (BBPS)**, you can securely process credit card transactions through **Altru**. After you enter your **BBPS** credentials in the product, your **BBMS** account automatically appears as a merchant account. You can then set the account as the default for authorization and Card Present transactions and use the account to process credit cards.

> 1. Enter Blackbaud Payment Service credentials.

To use **BBMS**, you must first link the program to your **BBPS** account. From *Revenue*, click **Blackbaud Payment Service merchant accounts** under **Configuration**. On the Blackbaud Payment Service Merchant Accounts page, click **Edit Blackbaud Payment Service login** under **Tasks**. Next, enter the login credentials created for your account, test the connection to BBPS, and then click **Save**. On the Blackbaud Payment Service Merchant Accounts page, your **BBMS** account automatically appears as an

option when you add a merchant account.

> 2. Set Blackbaud Merchant Services as the default account.

When you add a credit card payment in the back office, you select the merchant account to use to authorize the transaction. You can mark a merchant account as the default for authorization. You can also mark a default merchant account for Card Present transactions such as a credit card swipe at the front desk. From *Revenue*, click **Blackbaud Payment Service merchant accounts** under **Configuration**. Next, select your **BBMS** account under **Merchant accounts**, and set it as the default.

- To mark the account as the default for authorization, click **Default** and select **Mark as default authorization account**. When a confirmation message appears, click **Yes**.
- To mark the account as the default for Card Present transactions, click **Default** and select **Mark as default card present account**. When a confirmation message appears, click **Yes**.

> 3. Process credit card transactions.

Configure your BBMS account to process credit card transactions for online sales and payments toward recurring gifts and pledges.

Note: After you add **BBMS** as a merchant account, it automatically processes credit card transactions for Daily, Advanced, and Group sales. When you enter a back office payment, select **Authorize card on save** to process it through **BBMS**.

- For online sales, click *Web*, **Web payment settings**. Under **Payment methods**, select your **BBMS** account as the merchant account to process credit card transactions.
- For payments toward recurring gifts and pledges, click *Revenue*, **EFT** and then click **Credit card processing**. On the Credit Card Processing page, click **Add**. On the Add a credit card processing process screen, select your BBMS account in the **Account** field, and under **Where are the credit card transactions coming from**, select **New batch** and configure the payments and batch settings. After you configure the credit card process, click **Save**.

Note: The Nightly Credit Card Process for Recurring Gifts is a credit card process that runs automatically at night for recurring gifts. By default, it uses the merchant account assigned to the online shopping cart (**Web payment settings** in *Web*). You should confirm this credit card process is set to use your **BBMS** account.

Blackbaud CRM

With **Blackbaud Merchant Services (BBMS)** and the **Blackbaud Payment Service (BBPS)**, you can securely process credit card transactions through **Blackbaud CRM**. After you enter your **BBPS** credentials in the product, your **BBMS** account automatically appears as a merchant account. You can then set the account as the default for authorization and Card Present transactions and use the account to process credit cards.

> 1. Enter Blackbaud Payment Service credentials.

To use **BBMS**, you must first link the program to your **BBPS** account. From *Revenue*, click **Blackbaud**

Payment Service merchant accounts under **Configuration**. On the Blackbaud Payment Service Merchant Accounts page, click **Edit Blackbaud Payment Service login** under **Tasks**, enter the login credentials created for your account, test the connection to **BBPS**, and then click **Save**. On the Blackbaud Payment Service Merchant Accounts page, your BBMS account automatically appears.

> 2. Set Blackbaud Merchant Services as the default account.

When you add a credit card payment in the back office, you select the merchant account to use to authorize the transaction. You can mark a merchant account as the default for authorization. You can also mark a default merchant account for Card Present transactions such as a credit card swipe at the front desk. From *Revenue*, click **Blackbaud Payment Service merchant accounts** under **Configuration**. Next, select your **BBMS** account under **Merchant accounts**, and set it as the default.

- To mark the account as the default for authorization, click **Default** and select **Mark as default authorization account**. When a confirmation message appears, click **Yes**.
- To mark the account as the default for Card Present transactions, click **Default** and select **Mark as default card present account**. When a confirmation message appears, click **Yes**.

> 3. Process credit card transactions.

Configure your **BBMS** account to process credit card transactions for online sales and payments toward recurring gifts and pledges.

- For online sales, click *Web*, **Web payment settings**. Under **Payment methods**, select your **BBMS** account as the merchant account to process credit card transactions.
- For payments toward recurring gifts and pledges, click *Revenue*, **EFT** and then click **Credit card processing**. On the Credit Card Processing page, click **Add**. On the Add a credit card processing process screen, select your BBMS account in the **Account** field, and under **Where are the credit card transactions coming from**, select **New batch** to configure the payments and batch settings. After you configure the credit card process, click **Save**.

Blackbaud NetCommunity or Blackbaud Internet Solutions

With **Blackbaud Merchant Services (BBMS)** and the **Blackbaud Payment Service (BBPS)**, you can securely process credit card transactions through **Blackbaud NetCommunity** or **Blackbaud Internet Solutions**. After you enter your **BBPS** credentials in **Blackbaud NetCommunity** or **Blackbaud Internet Solutions**, your **BBMS** account automatically appears as a merchant account. You can then use this account to process credit card transactions.

> 1. Enter Blackbaud Payment Service credentials.

After you create your **BBPS** account, link it with your database. In **Blackbaud NetCommunity** or **Blackbaud Internet Solutions**, select **Administration, Sites & settings**. On the Settings tab, under **Web Services**, enter the login credentials created for your account under **Blackbaud Payment Service**. Click **Save**. Your **BBMS** account now automatically from **Administration, Merchant Accounts**.

➤ 2. Process credit card transactions.

You can use your **BBMS** account to process credit card transactions. Select the account when you design these parts:

- Advanced Donation Form (**Blackbaud Internet Solutions** only)
- Donation Form
- Event Registration Form
- Forms (**Blackbaud NetCommunity** only)
- Fundraiser (**Blackbaud NetCommunity** only)
- Membership Form
- Payment and Payment 2.0
- Personal Page Manager
- Sponsorship Form (**Blackbaud Internet Solutions** only)

eTapestry

With **Blackbaud Merchant Services (BBMS)** and the **Blackbaud Payment Service (BBPS)**, you can securely process credit card transactions through **eTapestry**. After you enter your **BBPS** credentials in **eTapestry** and add **BBMS** as a processor, you can then use the account to process credit card transactions.

➤ 1. Enter Blackbaud Payment Service credentials.

After you create your **BBPS** account, link it with your **eTapestry** database. In **eTapestry**, click **Management, My Organization, Preferences**. In the **BBPS UserName** and **BBPS Password** fields, enter the login credentials for the **BBPS** account. Click **Save And**.

Note: If you use Cart, Personal Fundraising, or eCommerce, or if you switch to **BBMS** from IATS or Sage, additional steps are required. For information about these steps, please contact Support at support@etapestry.com.

➤ 2. Add Blackbaud Merchant Services as a processor.

After you create your **BBMS** account, add it as a processor in your **eTapestry** database. In **eTapestry**, click **Management, My Organization, eCommerce**. Under **Tasks**, click **Add BBMS Processor**. Under **BBMS Transaction Processor**, specify the name and currency of your **BBMS** account, and enter the login credentials for the account. To set **BBMS** as the default account, select **Default**. Click **Save**.

Luminate Online Marketing and TeamRaiser

After you add **Blackbaud Merchant Services (BBMS)** as a merchant account and enter your **Blackbaud Payment Service (BBPS)** credentials in **Luminate Online**, you can use the account to

securely process credit card transactions.

> 1. Import your Blackbaud Merchant Service account.

After you create your **BBMS** account, import its settings into **Luminate Online**. On the Payment Services tab in Payment Capabilities, click **Import Blackbaud Merchant Services**, enter the user ID and password for your **BBPS** account, and then click **Import**.

Note: To enable the Payment Capabilities feature, request privileges for your Site Administrator from your Blackbaud Account Manager and then click **Setup, Payment Capabilities**.

> 2. Create merchant accounts.

After you import your **BBMS** account, create merchant accounts in **Luminate Online** based on your account configurations. On the Merchant Accounts tab in Payment Capabilities, click **Create Account**; select your **BBMS** account configuration as a credit card account; specify its details such as tax ID, supported credit cards, and whether it processes recurring transactions; and then click **Finish**.

> 3. Process credit card transactions.

To process credit card transactions through your **BBMS** account, select the appropriate merchant account to use with the following:

Note: We recommend you analyze your sustainers' giving activity and determine whether to migrate them to your **BBMS** account.

- Donation Campaigns
- eCommerce Stores
- Ticketed Events

OnMessage or OnBoard

After you add **Blackbaud Merchant Services (BBMS)** as a merchant account and enter your **Blackbaud Payment Service (BBPS)** credentials in **onMessage** or **onBoard**, you can use the account to securely process credit card transactions with the Store and through giving, event registration, application, and contract forms.

> 1. Enter Blackbaud Payment Service credentials.

In the **Payment Services** task located under **Core, Settings**, a Payment Service Manager enters the **BBPS** user name and password assigned to the school.

> 2. Create merchant accounts.

Use the **Payment Processing** task to add **BBMS** accounts.

- For **onMessage**, Giving Managers, Event Registration Managers, and Store Managers can use the **Payment Processing** task located under **onMessage, Settings, Giving/Event Registration/Store**.
- For **onBoard**, Admissions Managers and ReEnrollment Managers can use the **Payment Processing** task located under **onBoard, Settings**.

> 3. Process credit card transactions.

To use your **BBMS** account to process credit card transactions, Giving Manager and Event Registration Managers associate the account with the appropriate forms. To use **BBMS** to process Store transactions, Store Managers select the **BBMS** account to use in the **Payment Processing - Store** task.

The Patron Edge or The Patron Edge Online

With the **Blackbaud Payment Service (BBPS)**, **Blackbaud Secure Payments (BBSP)**, and **Blackbaud Merchant Services (BBMS)**, you can securely process credit card transactions through **The Patron Edge 3.406** and **The Patron Edge Online 3.4.1.4** or later. After you set up accounts with **BBPS** and **BBMS**, you can manage templates to securely accept online transactions through **BBSP**. After you set up your account, you can configure your settings and manage transactions through the **BBMS** web portal.

Note: **BBMS** only processes credit card transactions. If a workstation uses a PIN pad to process direct debit transactions, we recommend you use **PCCharge** to process transactions on that workstation.

> 1. Configure Blackbaud Secure Payments.

To securely accept online credit card transactions through **The Patron Edge**, you can use **BBSP** to provide a safe, PCI-compliant environment. To ensure a seamless experience as website users transition between your website and **BBSP**, you can design templates based on your website that meet the requirements of a secure environment.

After you create your **BBPS** account, link it with **The Patron Edge**. In **Administration**, click **BBSP Configuration** under **System Setup**, enter the credentials created for your **BBPS** account under **BBSP Username and Password**, and then click **Save Credentials**. Your **BBMS** account appears under **Merchant Accounts**.

> 2. Set up your workstations.

For each workstation in **The Patron Edge**, configure the **PaymentClient.ini** file to process credit cards through your **BBMS** account. The default location for this file is **C:\Program Files\Common Files\Blackbaud\The Patron Edge\Objects\PaymentClient.ini**. To edit the file, use a text editor such as *Notepad*.

- In the [Config] section, for **Processor=**, enter **BBSP**.
- In the [BBSP] section, for **Merchant=**, enter the name of the **BBMS** account as it appears on the **BBSP Configuration** screen.

To successfully process credit cards, you must also configure other credit card options in the PaymentClient.ini file, such as whether the workstation processes Card Present transactions or allows multiple credit cards for one transaction.

> 3. Prepare for online transactions (The Patron Edge Online only).

To use **BBMS** with *The Patron Edge Online*, you must perform additional steps to process online transactions.

- **Add Blackbaud Merchant Services as an online payment processor.**

In **Administration**, click **Payment Processing** under **System Setup**, enter BBSP as the processor, and then click **OK**.

- **Configure your Blackbaud Secure Payments credit card processing page.**

In **Administration**, click **BBSP Configuration** under **System Setup**; enter the login credentials and merchant account as they appear in *The Patron Edge*; set up the description, callback URL, and template for your credit card processing page; and click **Save**.

- **Define your user_data.asp page.**

In **Administration**, under **Content**, click **Site Design, Screens**. On the Site Design-Screens page, select the interface for your public site and edit the record for your user_data.asp page. Enter "bb_user_data_payment_method.asp" in the **Include After** field, enter "cache_secure_assets.asp" in the **Include Before** field, and then click **OK**.

- **Create a custom online payment method.**

In *The Patron Edge*, in **Administration**, double-click **Payment Methods** under **Parameters**, and then click **New**. Enter a description for the online payment method, select its general ledger account number and project code, select "Custom" in the **Payment Type Base** field, and click **OK**. In the **Code** column, the code generated for the payment method appears. In *The Patron Edge Online*, in **Administration**, click **OPS Parameters** under **OPS**, double-click **payType**, enter this payment method code with a prefix of "custom-" in the **Value** field, and click **OK**.

> 4. Process credit card transactions.

You can now use **BBMS** to process credit cards.

Raiser's Edge

With **Blackbaud Merchant Services (BBMS)** and the **Blackbaud Payment Service (BBPS)**, you can securely process credit card transactions through *Raiser's Edge*. After you enter your **BBPS** credentials in *Raiser's Edge*, your **BBMS** account automatically appears as a merchant account. You can then use this account to process credit card transactions through the *Electronic Funds Transfer (EFT)* module or *Batch*.

> 1. Enter Blackbaud Payment Service credentials.

To use **BBMS**, you must first log in with the Supervisor user name and link *Raiser's Edge* to your **BBPS**

account. In **Raiser's Edge**, click **Config** on the Raiser's Edge bar. On the Configuration page, click **General**, enter the login credentials under **Blackbaud Payment Service Credentials**, and then test the connection to **BBPS**. On the Merchant Accounts page, your **BBMS** account automatically appears.

Note: If you previously used ICVerify to process credit card transactions, you must set a business rule to use **BBMS**. In *Configuration*, click **Business Rules** and select **Batch options**. In the **Process credit cards and ACH gifts through** field, select IATS/Other.

> 2. Process credit card transactions.

With the *EFT* module, you can create transmission files of credit card transactions in a gift batch for **BBMS** to process. From the data entry screen of a gift batch, select **Tools, Create EFT Transmission Files** from the menu bar. On the Create Transmission Files screen, select **Create credit card file** and then select your **BBMS** account. To track the transactions included in the file, select **Create control report** and select whether to preview or print the report. To submit the transmission file to **BBMS**, click **Create Now**.

When your organization does not use the *EFT* module, you can use **BBMS** to authorize credit card transactions in *Batch*. From the data screen of a gift batch that includes the transactions to process, select **Tools, Authorize Credit Card Transactions** from the menu bar. When a message appears to ask whether to create a request file, select your **BBMS** account and click **Yes**. **Raiser's Edge** submits the request file to **BBMS**.