

Getting Started with Blackbaud MobilePay Terminal

Overview

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

Supported operating systems:

- Android 7.0 and higher, no "rooting"
- iOS 12 and higher, no "jailbreak"

To accept transactions, you can swipe the credit card through a Blackbaud MobilePay Terminal credit card reader, insert the card in the chip reader, or process through contactless payments via Apple Pay, G Pay, Samsung Pay, and most tap-to-pay cards. Blackbaud charges the same rate for all types of transactions. 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, **Blackbaud MobilePay Terminal** uses end-to-end encryption. Additionally, to secure payment information, **Blackbaud MobilePay Terminal** automatically times out after 15 minutes of inactivity during a transaction, and after 60 minutes with no transactions.

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

Blackbaud Merchant Services and Blackbaud MobilePay Terminal

1. Set up an account with **Blackbaud Merchant Services**: **Blackbaud MobilePay Terminal** 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 solutions@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 in to the **Blackbaud Merchant Services** web portal to complete the following steps.

2. Configure email acknowledgements: To configure email acknowledgements for **Blackbaud MobilePay Terminal** transactions, select **General settings** under **Account Management** in the web portal. Under **Email Acknowledgement Settings**, select **Edit email acknowledgement settings** to specify the frequency and recipients to use with acknowledgements for payments and refunds.
3. 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 Terminal**, select **Settings** on the menu to view the device name and the installed versions of the app and terminal software.

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.
- **Email subject lines.** Enter the subject lines to use with email acknowledgements sent for payments and refunds processed through the app.

Note: In the web portal, you can set default subjects for all mobile transactions. If you do not enter email subjects, the app defaults to your settings in the **Blackbaud Merchant Services** Web Portal.

- **Payment defaults.** Enter a default comment, and set default amounts for transactions processed through the app.

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

- **Payment button defaults.** Select a button and enter a default amount to display on the main Payment screen.

Note: You can save up to six payment button defaults.

Supported Payment Terminal

Blackbaud MobilePay Terminal supports the BBPOS Chipper™ 2X BT payment terminal. The Bluetooth-enabled terminal does not require an audio jack or any adapters.

Note: The BBPOS Chipper 2X BT is currently only compatible with **Blackbaud MobilePay Terminal**. The BBPOS Chipper 2X BT is not compatible with earlier versions of the **Blackbaud MobilePay** app.

The BBPOS Chipper 2X BT payment terminal is EMV-certified and supports swipe, chip, and contactless payments via Apple Pay, G Pay, Samsung Pay, and most tap-to-pay cards.

Note: You must purchase the BBPOS Chipper 2X BT payment terminal through Blackbaud. For more information, see [Payment Terminal Orders](#).

Blackbaud MobilePay Terminal displays the payment terminal's status and battery power indicator on the **Payment** screen. **Blackbaud MobilePay Terminal** prompts you to apply device software updates to ensure your payment terminal is up-to-date. Updates to the payment terminal are controlled in the **Blackbaud MobilePay Terminal** app.

Mobile Payments

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

1. Enter an **Amount** or select a default amount, then select **Collect payment**.

Note: From **Settings**, you can set a default amount or comment to use with payments.

2. Enter optional receipt details. To send an email receipt, enter the card holder's **Name on card**, **Email**, a **Comment** if applicable, and **Billing Address**, then select **Continue**.

Note: Contactless cards and mobile wallets may not provide cardholder data. Enter optional receipt details to save cardholder information.

3. Get credit card info. You can insert the card in the chip reader, tap the card on the payment terminal, or swipe the card.

Note: *Blackbaud MobilePay Terminal* only accepts card present transactions.

Process a Refund

From the *Blackbaud MobilePay Terminal* app, you can refund an approved credit card or direct debit transaction to the card holder as necessary. For a credit card transaction, you can refund all or part of the transaction amount. The refund amount cannot exceed the amount of the transaction that remains after any additional refunds.

Note: To prevent refunds for declined transactions, *Blackbaud Merchant Services* automatically holds refunds issued for direct debit transactions until five business days after the date of the original transaction. *Blackbaud Merchant Services* also automatically refunds any direct debit transactions that are approved but then returned by the bank.

Warning: When you refund a transaction through the *Blackbaud MobilePay Terminal* app, no corresponding refund appears in the database of your Blackbaud program. To ensure accurate giving or revenue totals, we recommend you issue refunds through your Blackbaud program when applicable.

1. Select a transaction to refund. From the main menu, select **Transactions**, then select the transaction you want to refund.
2. Enter a refund amount. On the **Details** screen, enter the amount you want to refund in **Refund amount**.

Note: The original transaction amount defaults in **Refund amount**.

3. Enter an email address and comment.

Tip: Enter an **Email address** to send an email acknowledgment and a **Comment**.

4. Start the refund. Select **Start refund** to open the **Refund screen**.
5. Issue the refund. Select **Issue refund**. The **Transaction** screen opens, showing the refund transaction.

Note: You can also use the *Blackbaud Merchant Services* Web Portal to refund transactions to the card holder. For more information, see [Refund a Transaction](#).

