



CharityEngine®

FirstData Credit Card & ACH Payment Processing Set Up

Updated: March 22, 2021

Payment Process Set Up

Thank you for getting started with CharityEngine! We are excited to be working with you throughout the implementation journey. In order to ensure that your payment processing is able to connect to your organization's donation and event forms we will need to complete the following 5 steps over the course of 3-4 weeks. Setting up this payment processor will allow your landing pages to collect credit chard and ACH information. Below you will find the step by step checklist of getting your payment system up and running. Let us know if you have any questions. Please contact your project manager, Samantha Jones: samantha.jones@charityengine.net if you have any questions.

□ Step 1

COMPLETE FIRSTDATA FORM

Fill out the FirstData Account Set Up form in it's entirety.

Access the form using this link: <https://web.charityengine.net/Default.aspx?tsid=12256>

Principal Information	
Owner/Principal of Organization	Owner/Principal of Organization
First Name	Last Name
Owner/Principal of Organization	E-mail Address of Auth.net Admin
Title	
Merchant Email	Merchant Customer Service (Email)
Merchant URL	Social Security # of Signing Executive

Note while filing out the Form:

- The Name of the Owner/Principal of Organization must match the SSN, email address and Signature.
- Email address must have the name of the individual (cannot be: info@charityengine.net for example) & must be a valid email registered to that individual
- The SSN must be of the individual that is the Auth.Net Admin- the processing account must me tied to an individual
- Driver's license must also match the same individual as the SSN, Email and Signature
- This form MUST be filled out before the rest of the process can continue



□ Step 2

SIGNITURE & CARDPOINTE SET UP

Once the FirstData form is completed, your project manager will be notified. Once your project manager is notified they will then directly submit this information to FirstData. When the information is submitted to FirstData an email will be triggered to send. **The email will be sent from "CardConnect" to the individual who's email was submitted on the form. When the email comes through, it will prompt that individual to set up a "CardPointe" portal/account and sign to accept the system.**

If you receive the link and attempt to sign, but get an error message stating that the "link has expired", let your project manager know and they will be able to re-set the link for you and resend.

The CardPointe portal is going to be your organization's portal for managing your payment processing account. The CharityEngine team does not have access to this portal or account. If there are any issues with CardPointe, reach out to their support individually (also let us know so we can also try to help).

It will take up to 1-2 weeks for the account to be approved and accepted once the signature is submitted.

□ Step 3

POST-APPROVAL GATEWAY SET UP

Once your account is approved by FirstData, your project manager will inform you and begin to set up the gateway on the back end. This will take about 1-3 days for set up. And can only take place once the account is approved post-signature and portal set up.

□ Step 4

TEST CREDIT CARD SET UP

When your account gateway is set up and finalized, the CharityEngine team will submit a test transaction through your Donation from that is set up in your CharityEngine system. The test transaction will typically be for an amount such as: \$5.05. Your project manager will inform you when this test transaction is taking place so that you can confirm that the transaction has come through your CE instance and hit your bank account. It will typically take 1-2 business days for the transaction to show up in your bank account. Once confirmed, our team will issue a refund via your CE instance.



□ Step 5

SET UP ACH/TELECHECK

Next, we will need to sign and submit the Telecheck Service Application and Agreement. Your project manager will fill out the form with all of the information that has been provided previously. Except we will need the following:

- Number of Organization Employees
- Organization Annual Revenue Amount

This form will be sent from Samantha Jones via Docusign to the individual that was listed on the original FirstData form. The Docusign will be sent to the email provided and will require a Signature, Initial, Printed Name and Date along with the Number of Employees and Annual Revenue Amount.

All of the required fields will be highlighted upon sending. Please be sure that the signature is clear and legible as Telecheck is strict about signatures and submission. If we need to resend the form for signature via Docusign, not a problem- let us know. It will be easier to get it right on the front end than going back and forth with Telecheck.

Once the Telecheck form is submitted it will take about 1 week for the form to be processed and approved by Telecheck.

Once approved, your full Payment Processing system will be LIVE.



If you have questions throughout this process, please contact
Samantha Jones: samantha.jones@charityengine.net