Achieve Success with Blackbaud Altru®

Blackbaud Altru Project Prep Checklist

We are excited to be partnered with you on your Blackbaud Altru® project! We have developed a best practice checklist to help ensure your team is ready to begin your implementation project. Please work through the action items below to prepare for your project.

☑ ### Create a Blackbaud ID
Each Blackbaud Altru user will need a Blackbaud ID (BBID) to access Blackbaud.com, Blackbaud Altru, Blackbaud University, and Customer Support. Your initial organization administrator will receive an email invitation prompting them to accept their BBID. They can then invite other admins or invite other users.

☑ ### Sign up for Training
Blackbaud University's mission is to accelerate the success of your organization. You should begin taking the recommended Implementation trainings right away to begin building your skillset in your new solution. These trainings will give you a better understanding of you solution and how to design the system and are critical to your overall success.

Blackbaud Altru Implementation Learning Paths:

Pre-Test Run Training

Pre-Final Run Training

☑ ### Set Up Blackbaud Merchant Services™
Blackbaud Merchant Services (BBMS) makes payment processing simple, secure, and affordable. Save time with pre-reconciled bank deposits, automatic credit card updates, robust fraud management tools, and reduced PCI compliance.

An Organization Administrator can create your BBMS account using our secure online portal to enter data to provision your account.

Use our BBMS Quick Start Checklist to compile the information you will need to create your BBMS account:

BBMS Basics of the Web Portal

Processing Payments with BBMS

☑ ### Accept Your Altru Access
Your Project Team Lead will receive an email with the subject line, "KEEP THIS EMAIL: YOUR ALTRU DATABASE." This will allow the Project Team Lead access to Altru. Please note that Blackbaud Altru uses a single sign-on process that enables users to log in with their Blackbaud ID. For steps to add the new Altru user, please see this Knowledgebase article: I need to add a new user to Altru (includes video demo).

☑ ### Explore the Altru Onboarding Portal
This portal walks you through each step of Blackbaud Altru onboarding — from planning to go live — and provides resources to help you complete each task. We recommend beginning at the Get Started page of the portal.