

Achieve Success with Blackbaud TeamRaiser®

Blackbaud TeamRaiser Project Prep Checklist

We are excited to be partnered with you on your Blackbaud TeamRaiser 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 TeamRaiser user will need a Blackbaud ID (BBID) to access Blackbaud.com, 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](#).



Compile Data for Conversion

If your organization does not own the Blackbaud Raiser's Edge/Luminate Online Integration Plugin, the next main priority for your project is to send a copy of your data to Blackbaud. Your data conversion cannot begin until we have usable data. Project plan timeline and overall implementation progress is dependent on your data submission. You can find more information about what columns to include in your data upload in your Scope of Work.



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 your solution and how to design the system and are critical to your overall success.

Blackbaud TeamRaiser Learning Path:

[Peer-To-Peer Implementation 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](#)