

Scoutbook Plus Online Payment Onboarding

You will need to link your unit's bank account with Stripe to accept payments through Scoutbook Plus. Please proceed with the following steps to onboard your unit.

IMPORTANT ITEMS:

1: DO NOT START THE PROCESS UNLESS YOU HAVE CONFIRMED THE EIN (Employer Identification Number) ASSOCIATED WITH THE BANK ACCOUNT AND THE LEGAL NAME OF THE ENTITY FOR WHOM THE EIN IS REGISTERED

(this may be different than the name of the organization that is listed on bank statements).

THE NAME FOR WHOM THE EIN IS REGISTERED MUST MATCH EXACTLY OR A STRIPE ACCOUNT WILL BE UNABLE TO BE CONFIRMED.

2: DO NOT ONBOARD MORE THAN ONE UNIT AT A TIME. MAKE SURE EACH UNIT IS COMPLETED BEFORE INITIATING ANOTHER UNIT.

STEP 1: To begin, your unit will be in **"Pre-Staging"** status. Submit the Direct Payment Contact by clicking EDIT. The Direct Payment Contact must be one of the following:

Unit Leader
Chartered Organization Representative
Committee Chair
Key 3 Delegate
Treasurer

Online Direct Payment - Prestaging

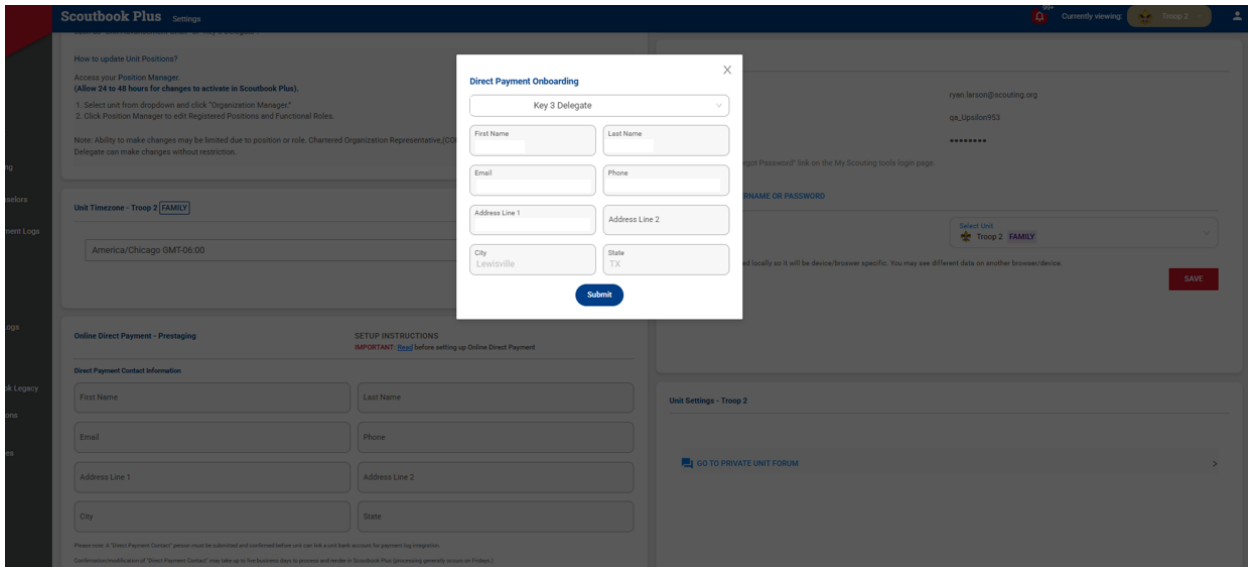
SETUP INSTRUCTIONS
IMPORTANT: [Read](#) before setting up Online Direct Payment

Direct Payment Contact Information

First Name	Last Name
Email	Phone
Address Line 1	Address Line 2
City	State

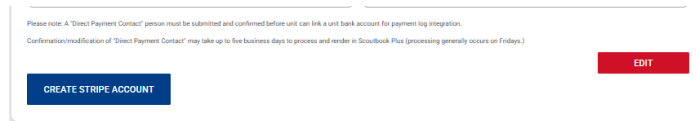
Please note: A "Direct Payment Contact" person must be submitted and confirmed before unit can link a unit bank account for payment log integration.
Confirmation/modification of "Direct Payment Contact" may take up to five business days to process and render in Scoutbook Plus (processing generally occurs on Fridays.)

[CREATE NEW CONTACT](#) [EDIT](#)



STEP 2: The unit will move to “Staged” status.

STEP 3: Direct Payment Contact will be confirmed within 48 hours after submittal. Once the Direct Payment Contact is confirmed your account will go into “Initiated” or “Link Generated” status. A **“Create Stripe Account”** button will be available and you may click to onboard your unit.



IMPORTANT:
ONCE “CREATE STRIPE ACCOUNT” IS CLICKED, THE LINK WILL ONLY BE ACTIVE FOR 10 MINUTES FOR SECURITY REASONS.

DO NOT CLICK THE CREATE STRIPE ACCOUNT UNLESS YOU ARE READY TO ONBOARD YOUR UNIT.

IF YOUR LINK BECOMES INACTIVE, A NEW LINK WILL BE GENERATED THE FOLLOWING DAY.

Step 4: After clicking the “Create Stripe Account” link you will be directed to the Stripe website. You will be asked to enter your email and phone number so that MFA (multiple factor authentication) codes can be sent to you for account security.

The phone number will be used each time you login to send the MFA code so it should be your own number that can receive text messages (text and data rates may apply).

The screenshot shows a two-column layout. The left column has a dark background and contains the BSA Platform logo, a headline about Stripe partnership, a return link, and footer links for Stripe, Contact, Terms, Privacy, and Language. The right column has a white background and contains a 'Test mode' indicator, a title 'Get paid by BSA Platform', a sub-header, an email input field with a note that email is not needed in test mode, a mobile number input field with a dropdown for country (US) and a pre-filled number (201) 555-0123, a 'Continue' button, and a small disclaimer at the bottom.

BSA Platform

BSA Platform partners with Stripe for secure payments and financial services.

[← Return to BSA Platform](#)

Powered by **stripe**

[Contact](#)

[Terms](#)

[Privacy](#)

[English \(US\)](#)

Test mode

Get paid by BSA Platform

Fill out a few details so you can start getting paid.

Email

Email is not needed in test mode

Mobile number

US (201) 555-0123

We'll text this number to verify your account. Message and data rates may apply. By continuing, you agree to our [Terms of Service](#) and [Privacy Policy](#). In test mode, you can skip this with the [test phone number](#).

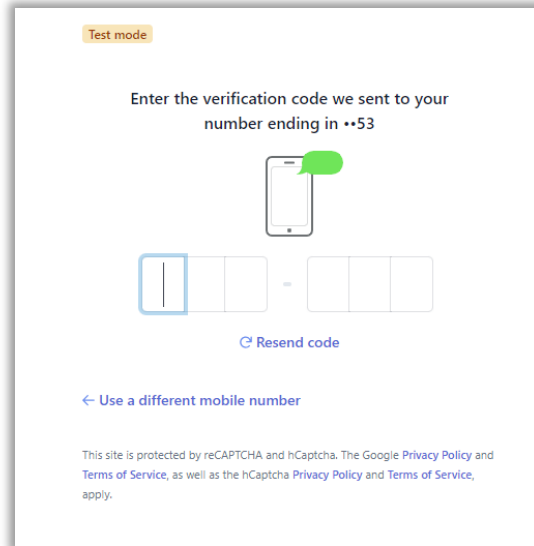
[Continue →](#)

This site is protected by reCAPTCHA and hCaptcha. The [Google Privacy Policy](#) and [Terms of Service](#), as well as the [hCaptcha Privacy Policy](#) and [Terms of Service](#), apply.

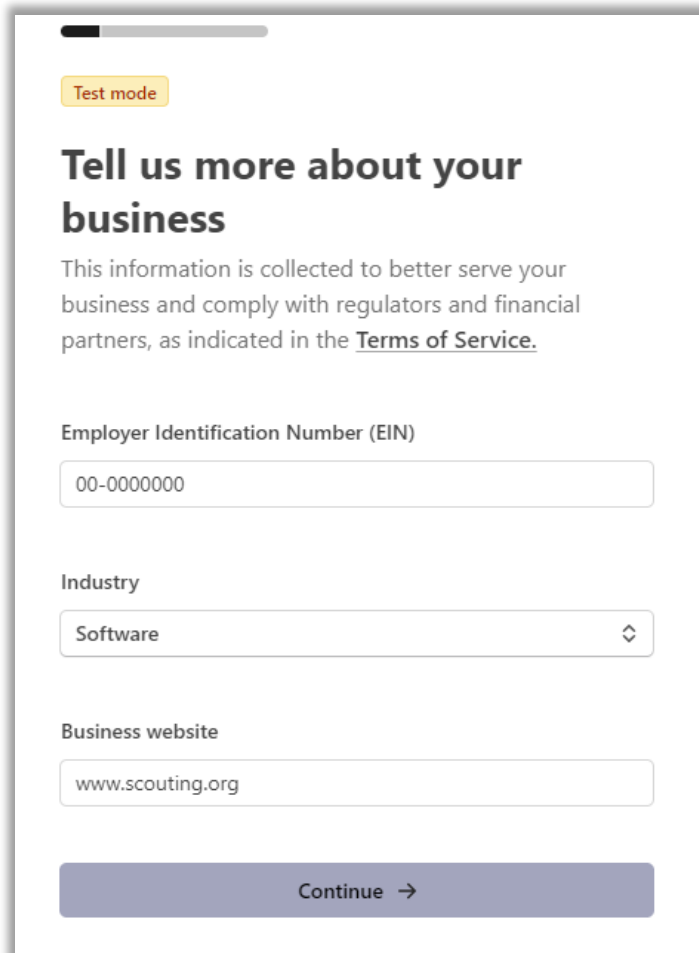
Step 5: Once you have entered your email and phone number, click Continue.

Clicking Continue will automatically send the MFA to the phone number you entered (if you entered the wrong number, you can go back and change it)

If you do not get the code, you can click Resend Code. Or, if you think you entered the wrong phone number (or just wish to change it), you can click Use a different mobile number.



Step 6: After you have entered the MFA and clicked Continue, you will be asked to enter your unit's information. **The EIN must match the EIN that is associated with your unit's bank account.**



URL Edit

Address

Other information provided
EIN, Phone, Industry

Legal business name

**MUST MATCH NAME ON EIN
(Not necessarily the name on
bank account)**

Your legal business name and Employer Identification Number must be entered exactly as they appear on IRS-issued documents, including capitalization and punctuation. Not sure? Check your Letter 147C or SS-4 Confirmation Letter.

Employer Identification Number (EIN)

If you use your Social Security number for business tax purposes, you can enter that instead. If you are uncertain about which tax ID guidelines are best for your organization, please refer to this [support article](#).

Step 7: The next step will be adding the account representative.

Test mode

Account representative

Add or select a person who has the authority to represent your organization.

Add representative

Add someone new

Select someone

Will [avatar] [avatar]

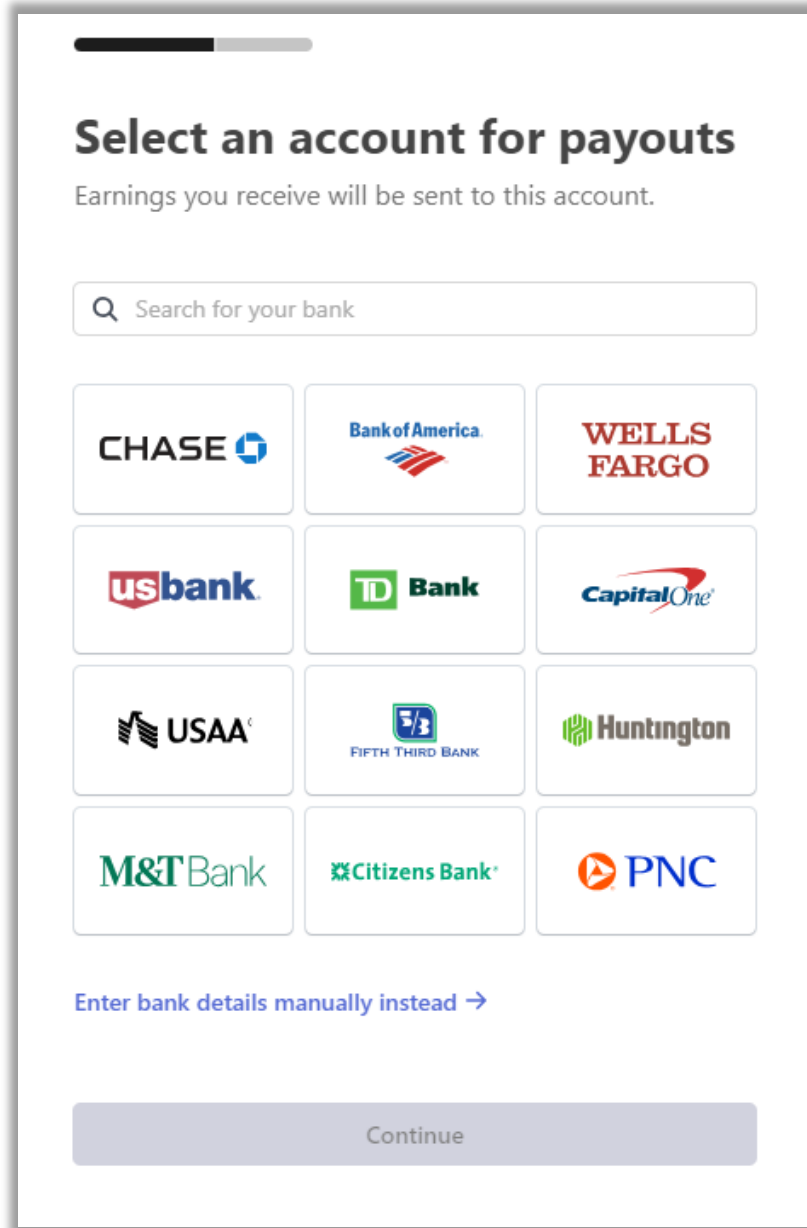
Clicking Add Representative will open the following form.

The screenshot shows a mobile interface for adding an individual. At the top left, there is a 'Test mode' indicator. The main heading is 'Add an individual'. Below the heading is a paragraph explaining that it's required to add anyone on the governing board, owning 25% or more of the company, or having significant management control. A link for 'Learn more' is provided. The form includes two input fields for 'Legal name' with the values 'Scout' and 'Executive'. An 'Email address' field contains 'councilxxx.paymentplatform@scouting.org'. At the bottom, there are two buttons: a dark blue 'Add' button and a white 'Cancel' button.

You will then need to verify personal details as shown below.

The screenshot shows a 'Verify your personal details' form. It starts with a warning that the account should be activated by someone authorized to sign on behalf of the organization. The form fields include: 'Legal name' with 'William' and 'Hesselt'; 'Email address' with 'mailto:bill.hesselt@scouting.org'; 'Job title' with 'Scout Executive'; 'Date of birth' with a date picker set to 08/21/1988; 'Phone number' with a dropdown for 'US' and a field containing '+1 202 743 1234'; and 'Last 4 digits of Social Security number' with a field containing '****-0000'. A note below the SSN field says 'Provide a government-issued ID number instead'. A 'Continue' button with a right arrow is at the bottom.

Step 8: You will then need to select a financial institution for payouts. You can use the search to locate your bank.



After selecting your institution, you will need to Agree to the Terms of Service.



A modal dialog box with a white background and a dark border. In the top right corner, there is a close button (an 'X' icon). At the top center, there are two icons: a grey square icon with a storefront symbol and a blue square icon with a white 'S' (Stripe logo), connected by a dotted line. Below the icons, the text reads: **Boy Scouts of America uses Stripe to connect your accounts**. There are two bullet points: the first has a link icon and says 'Fast and simple' followed by 'Connect your account in seconds.'; the second has a lock icon and says 'Your data is encrypted' followed by 'Boy Scouts of America can access data. You can disconnect at any time.' At the bottom, there is a line of text: 'By continuing, you agree to Stripe's Terms and Privacy Policy'. Below this is a large blue button with the text 'Agree and continue'. At the very bottom, there is a link: 'Manually verify instead'.

Boy Scouts of America uses Stripe to connect your accounts

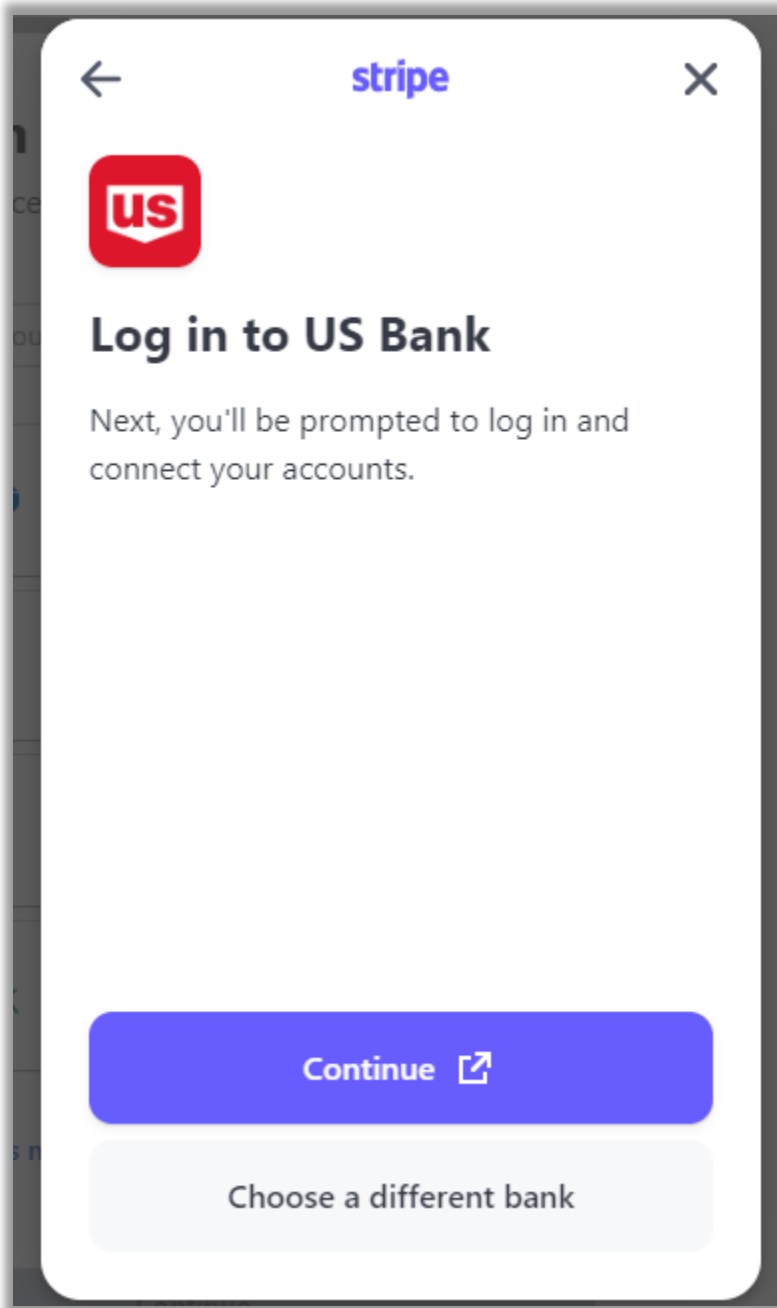
-  **Fast and simple**
Connect your account in seconds.
-  **Your data is encrypted**
Boy Scouts of America can access data.
You can disconnect at any time.

By continuing, you agree to Stripe's Terms and Privacy Policy

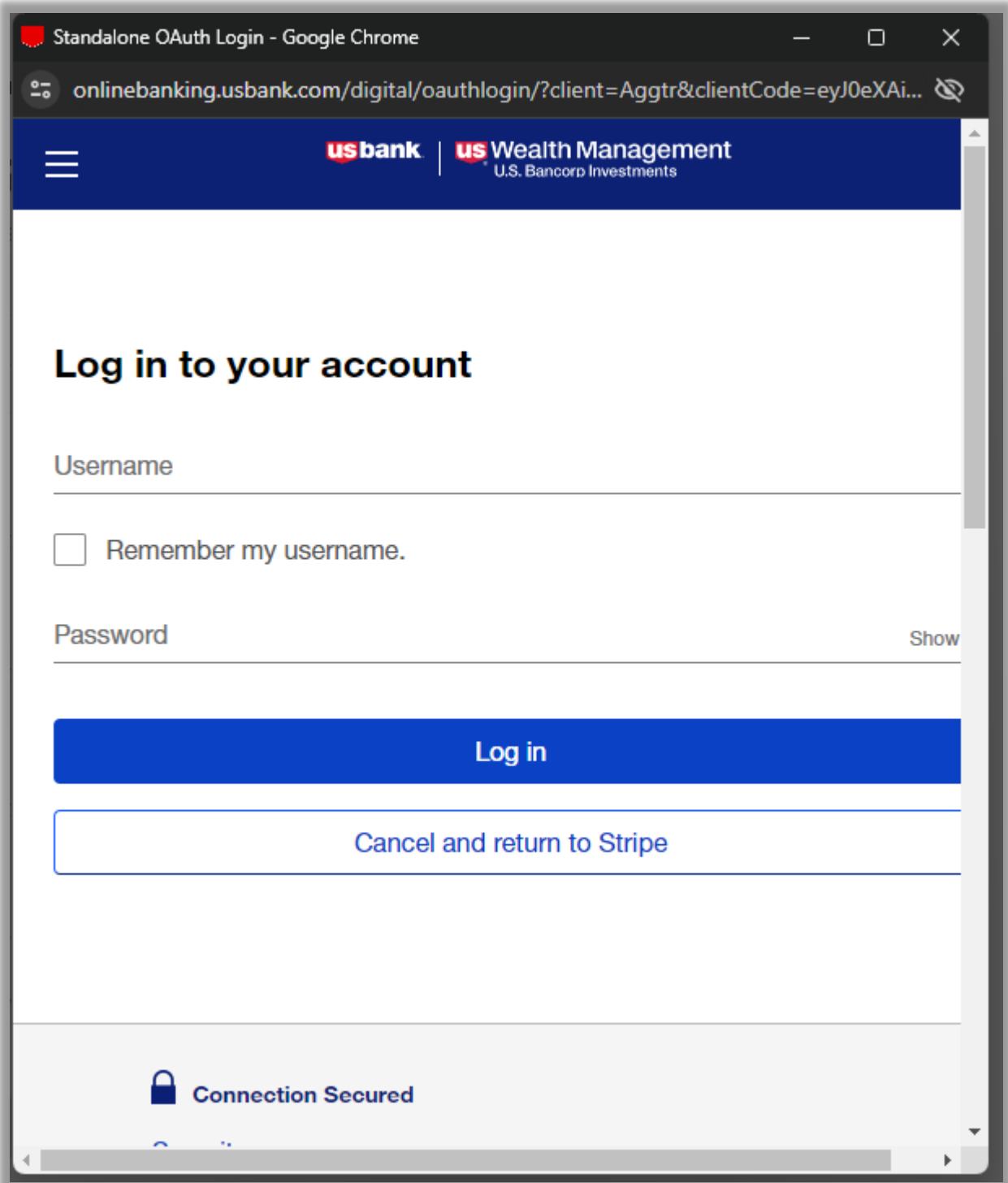
Agree and continue

Manually verify instead

Once you have agreed, you will be prompted to log into your bank account. If you chose the wrong bank, you can click Choose a different bank to go back.

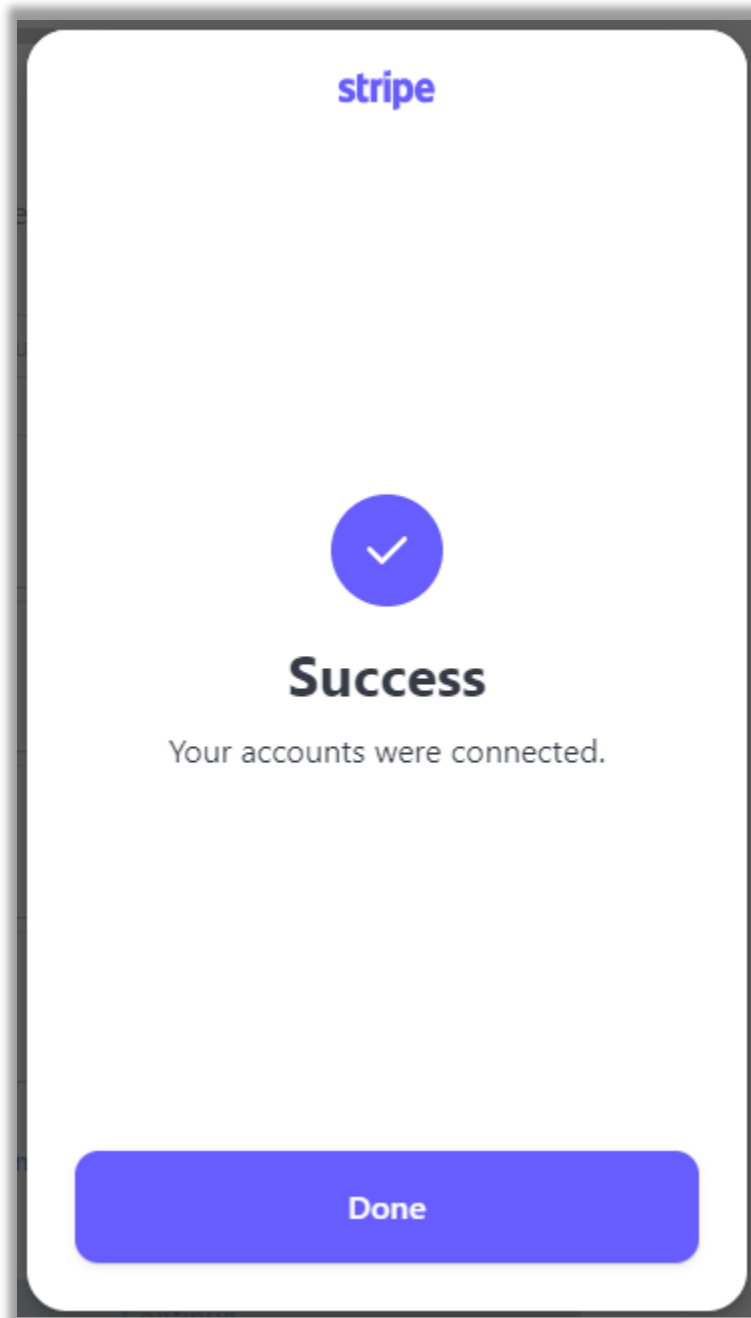


Step 9: Clicking Continue will open a new window with your bank login screen. You will enter the username and password for your bank account here.

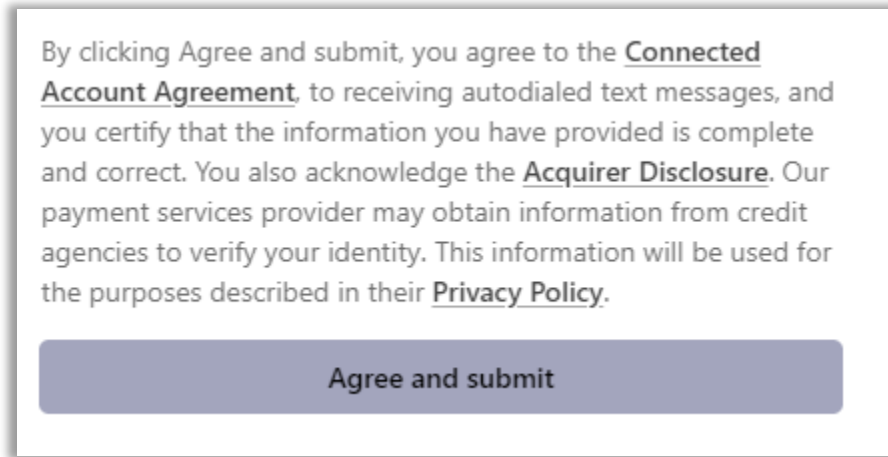


Your bank may require a verification code so you will need to get that from the phone number on your bank account.

Once you have logged in and shared the account details, you will see the following Success message letting you know that Stripe and your bank are successfully linked.



Step 11: Once everything is correct, you will click Agree and Submit.



Step 12: Your unit is done onboarding and should have “Onboarded” status.

Online Direct Payment - Onboarded

Direct Payment Contact Information

First Name	Last Name
Email	Phone
Address Line 1	Address Line 2
City	State

Please note: A "Direct Payment Contact" person must be submitted and confirmed before unit can link a unit bank account for payment log integration.
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Change Online Payment Status

[EDIT](#)

[Manage Stripe Account](#)

Users will now have the option to pay charges online from their individual payment log in Scoutbook Plus.

