

STRIPE CONNECT SETUP

To accept online payments through your website, you'll need to set up an account with Stripe, our third-party payment processor. First, collect the following information:

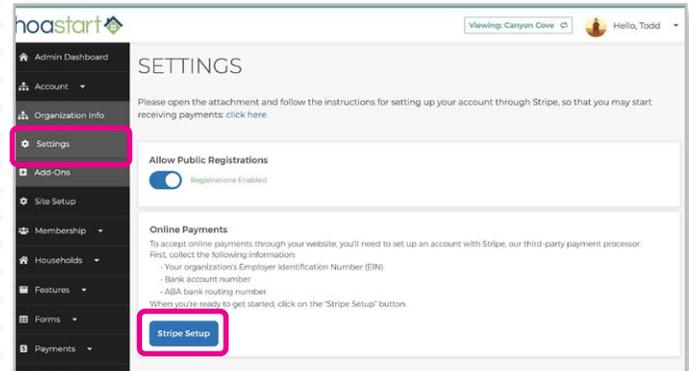
- ◆ Your organization's Employer Identification Number (EIN)
- ◆ Bank account number
- ◆ ABA bank routing number

Step 1: Begin the Setup Process

Be sure you have access to the necessary community financial information before you start setting up your Stripe Connect account. To begin, go to the Admin Dashboard, click on the "Account" tab to open it, and click on the "Settings" tab.

Click on the "Stripe Setup" button to be directed to Stripe's website.

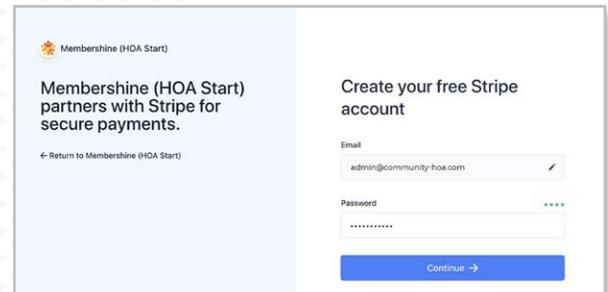
Stripe is a pay-as-you-go payment processing platform with flat-rate, transaction-based fees. Stripe will subtract 3.5% plus \$0.30 per transaction from the collected total when you accept card payments online. Stripe does not charge monthly or annual fees.



Step 2: Get Started with Stripe

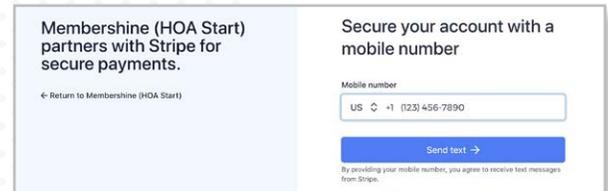
Create a new account:

You will need an e-mail address to create a new account. Choose a secure password. Be sure to make note of your e-mail address/password combination for your records. If your e-mail address is associated with an existing account, Stripe will recognize your address. Click on the "Continue" button to proceed.



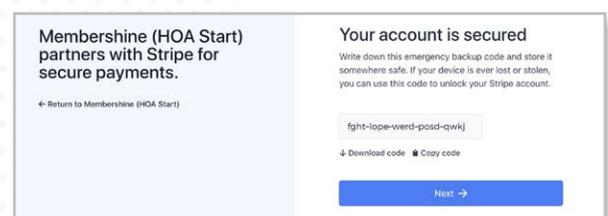
Secure your account:

If you are new to Stripe, you will be prompted to secure your account with a mobile phone number. Stripe will send you a text message with a 6-digit code number.



Receive a backup code:

Once you have verified the code, Stripe will provide you with a 20-digit emergency backup code that you can use to unlock your Stripe account. Be sure to save this backup code for future use.



STRIPE CONNECT SETUP – CONTINUED

Basic organization information:

Next, you will need to provide information about your organization, including your location, type of organization, and organization structure. The legal business name and EIN you provide in this step must match the ones listed on your IRS documents.

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Tell us more about your business

Stripe collects this information to better serve your business and help meet the requirements of regulators, financial partners, and our Services Agreement.

Legal business name

The combination of your name and Employer Identification Number (EIN) must exactly match the one listed on your IRS documents (e.g., Letter 147C or SS-4 Confirmation letter), including capitalization and punctuation.

Employer Identification Number (EIN)

If you use your Social Security number for business tax purposes, you can enter that instead.

Verify personal information:

Stripe will collect personal details from whoever opens your account, so someone authorized to sign on your organization's behalf should activate your account. If you do not that authority, please ask the appropriate person to complete this form.

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Verify your personal details

This account should be activated by someone authorized to sign on your organization's behalf. If that's not you, please ask the right person to complete this form.

Legal name

First name

Last name

Email address

Organization fulfillment details:

Stripe asks how you will provide products or services to your organization. In most cases, your customers will be your Members and can be marked as "Consumers." Depending on how you use the One-Time Charge payment option, you may have "Businesses" making payments as well.

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Fulfillment Details

Tell us how you provide products or services.

Your customers are:
Select all that apply

Businesses Consumers

You sell:
Select all that apply

Physical goods Digital goods
 In-person services Digital services
 Other products

When do your customers make their payments?
Select all that apply

Your customers pay before they receive the product or service
 Your customer's pay and the product or service is immediately accessible

Provide bank account information:

To receive payouts from Stripe, you must provide both your bank routing number and your account number.

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Add your bank to receive payouts

A payout is the transfer of funds from Stripe to your bank account.

Routing number

Account number

Your bank account must be a checking account.

Add public details for the customer:

Include a statement descriptor to identify the transaction on your members' monthly statements, invoices, and receipts. (Note that each statement may display this information differently or not at all.)

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Add public details for customers

This information may be visible in payment statements, invoices, and receipts.

Statement descriptor

Your statement descriptor shows up on your customers' bank or credit card statements. It should be 5-22 characters.

STRIPE CONNECT SETUP - CONTINUED

Help combat climate change:

Stripe offers an option to collect a percentage of each transaction to help fund next-generation carbon removal to combat climate change. Select “No thanks” to opt out.

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Show customers your climate commitment

Membershine (HOA Start) partners with Stripe Climate to make it easy for your business to combat climate change.

Set your contribution

Every dollar will fund next-generation carbon removal. Edit your program anytime from your account settings.

0.5% **1% MOST POPULAR of revenue** 1.5%

Start contributing after I have processed

Review your information:

As a final step in the Stripe Connect setup process, review and confirm your information. If you need to make any changes, click on the edit pencil icon next to the information to update. When everything looks correct, click on the “Submit” button to return to the HOA Start “Settings” page.

The approval process for a Connect account is almost immediate if you have entered the correct information. Once you complete the Stripe onboarding process, you should receive confirmation via e-mail within the hour.

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Review and finish up

You're almost ready to start exploring Membershine (HOA Start). Take a moment to review and confirm your information.

BUSINESS DETAILS

Community HOA
https://community-hoa.com
1234 Main St
San Antonio, TX 78201

Other information provided
EN, USA, Industry

Update fulfillment details

PUBLIC DETAILS

Update support information
Shown as Community HOA on customer statements

1234 Main St
San Antonio, TX 78201
(214) 456-7890

MANAGEMENT AND OWNERSHIP

Todd Jefferson
Account representative
Pending verification
admin@community-hoa.com
Born on January 1, 1990
1234 Main St
San Antonio, TX 78201

Other information provided
Last 4 SSN, Phone

PAYOUT DETAILS

STRIPE TEST BANK (USD) Default

Step 3: Get Connected

Enable payment options:

Once you complete the Stripe setup process and Stripe verifies your information, your Stripe Customer ID will appear automatically in the field on the Settings page. Please note that this information may take up to an hour to propagate into our system.

Once the Customer ID has loaded, your organization can begin to collect online payments. Activate the “Enable Credit Card Payments” toggle switch and you are set. You also can offer your members the option to pay directly from their bank accounts by activating the “Enable ACH Payments” toggle switch.

hoastart

Viewing: Canyon Cove Hello, Todd

Admin Dashboard

Account

Organization Info

Settings

Add-Ons

Site Setup

Membership

Households

Features

Forms

Payments

Public Site

SETTINGS

Please open the attachment and follow the instructions for setting up your account through Stripe, so that you may start receiving payments: click here

Allow Public Registrations

Registrations Enabled

Enable Credit Card Payments **Enable ACH Payments**

Stripe Enabled **Paid Disabled**

Stripe Customer ID

acct_1M0XSEZV1A1ovTX

Save Changes Cancel



If you have additional questions about the Stripe Connect setup process, please open a Support Desk ticket through your Admin Dashboard.