Feature Summary: PayPal API Update

Module: Donations 2.0

Release: Summer 2010
Document Owner: Michelle Shefter

IMPORTANT NOTE: THIS DOCUMENT INTENDS TO PROVIDE A COMPLETE AND ACCURATE REPRESENTATION OF WHAT CONVIO FULLY EXPECTS TO DELIVER IN SUMMER 2010 (AS OF SEVERAL WEEKS PRIOR TO LAUNCH) BASED ON COMPLETED SOFTWARE DEVELOPMENT. THIS DOCUMENT AIMS TO SERVE AS THE BASIS FOR PLANNING AND PREPARATION WELL IN ADVANCE OF ACCESS TO THE NEW FEATURES. GIVEN THIS DOCUMENT WAS DRAFTED PRIOR TO COMPLETED QUALITY ASSURANCE, ALL FEATURES, CAPABILITIES, SCREENSHOTS, ANSWERS, CLIENT IMPACTS, SITE DATA PARAMETERS, AND LIMITATIONS LISTED HEREIN, WHILE REASONABLY CERTAIN FOR INCLUSION IN THE RELEASE, ARE SUBJECT TO CHANGE AT ANY POINT UP UNTIL ROLLOUT ON YOUR CONVIO SITE.

Overview

With the Fall 2009 patch release, Convio made it possible for clients using the Payflow Pro payment gateway to offer PayPal as a payment option in Donations 2 forms. With the Summer 2010 release, this feature will be made available to those clients using other payment gateways.

New Concepts or Terms

PayPal Business account: A type of PayPal account that will be the repository for PayPal transactions. Clients can go to https://www.paypal.com/nonprofit to start this. **Note:**, Convio Client Support will need the email address used to create the account. Also note that if clients want to accept recurring transactions for PayPal payments, they need to work with PayPal to configure their Business account accordingly.

Key Features & Benefits

PayPal payment option: Clients can configure their online donation forms to offer PayPal as a payment option.

Default Payment Configuration: Clients can determine the default payment type on donation forms that include PayPal. For example, they can choose to make PayPal the default (preselected) payment type.

Include PayPal Logos: Clients can include 3 different PayPal logos on their donation form. The PayPal branding of the logos will reassure those donors who have trepidation about using their credit card online.

Client Considerations

1. This feature is only available within Donations 2 forms. It is not available for transactions in
    - TeamRaiser Registration
    - eCommerce
    - Events
    - Personal Fundraising
    - Donations Classic
2. Clients who wish to use PayPal for recurring transactions will need to work with PayPal to make sure their Business Account is configured to accept recurring transactions.
3. Clients not interested in using this feature can safely ignore it.
4. Clients interested in using this feature will need to create a PayPal Business account. Then they will work with Convio to associate it with their payment gateway. Client data syncs will need to be updated to track this new transaction type. Clients will then need to edit their donation forms to make PayPal a payment option on forms created before this feature was available.

5. For clients who use this feature, all new Donations 2.0 forms will automatically offer Pay Pal as the default (preselected) payment option. Clients can edit the individual form to make another payment option the default (such as, credit card) or to remove Pay Pal from the payment options for that form.

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Feature Configuration

To take advantage of this functionality, the client will need to create a PayPal Business account. That can be done by following the instruction on this page: https://www.paypal.com/nonprofit.

After creating a PayPal Business account, the client may need to enable their business account for reference transactions. PayPal has a process for this requiring paperwork on the client's part.

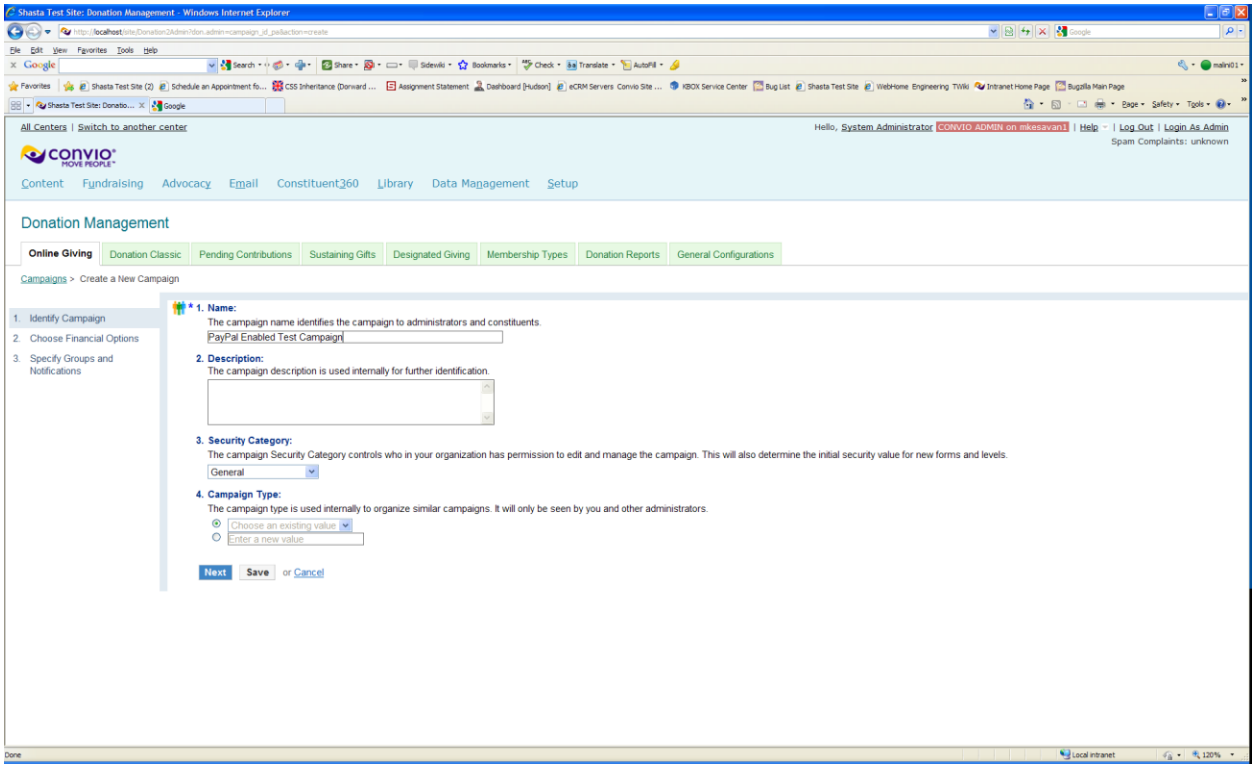
For Convio to connect to the client's PayPal Business account, the client will have to provide Convio with the API credentials that can be found at the Profile→API Access tab in their PayPal business account. On that tab, the client will need to 'Enable Express Checkout' and request API access. They will be given an API signature they will need to provide to Convio

There are no SDPs to configure.

If clients would like to modify the user flow of the interaction with the PayPal site, they can edit it in the General Configurations tab in Donations. (See screenshots below)

Admin – PayPal-Enabled Donation Form

Create PayPal-Enabled Campaign using the merchant account created above.

1. 

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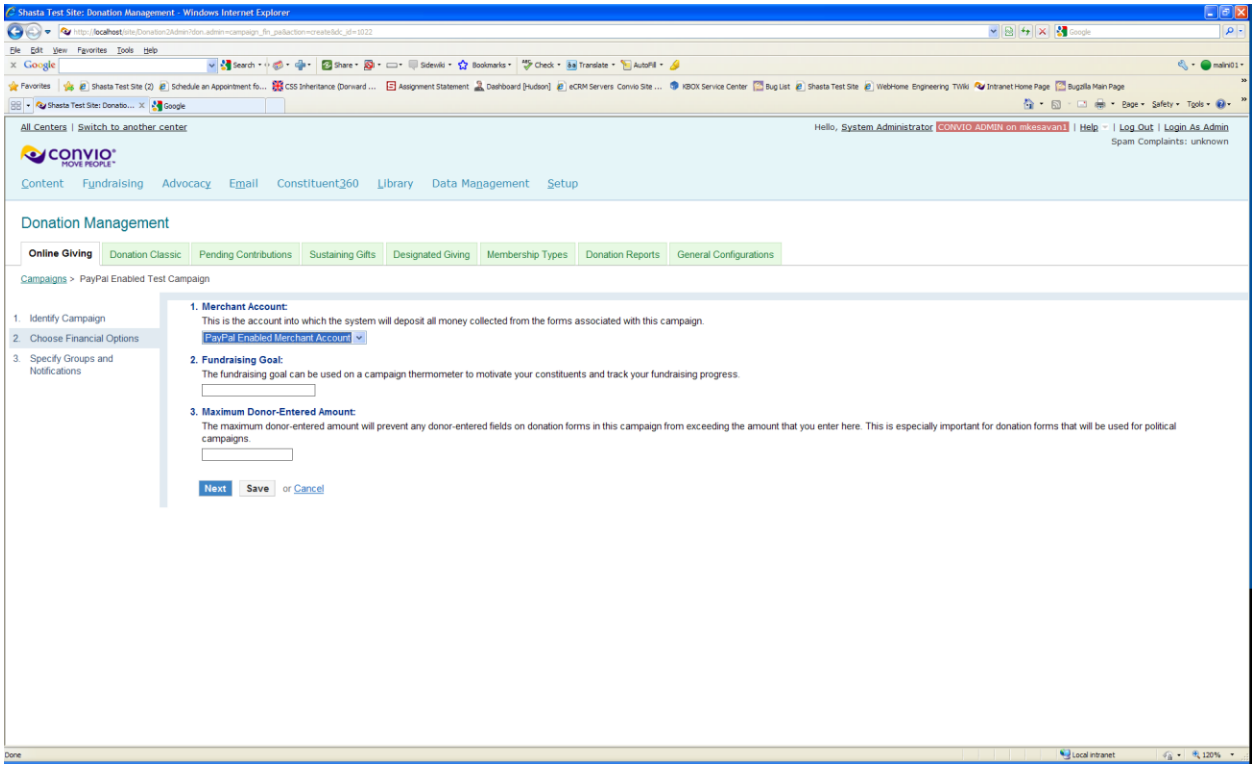
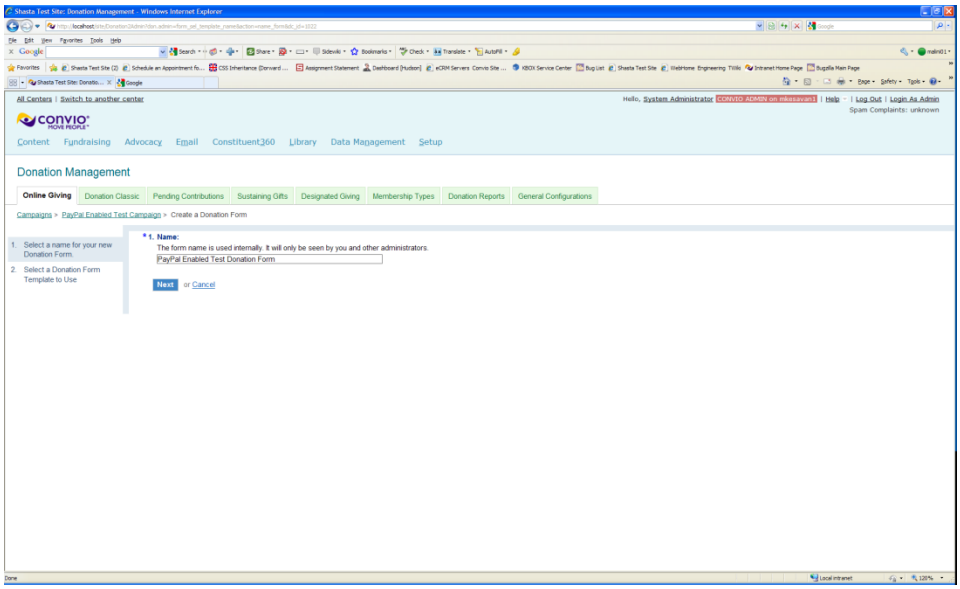
2. 

3. Create Donation Form for this Campaign



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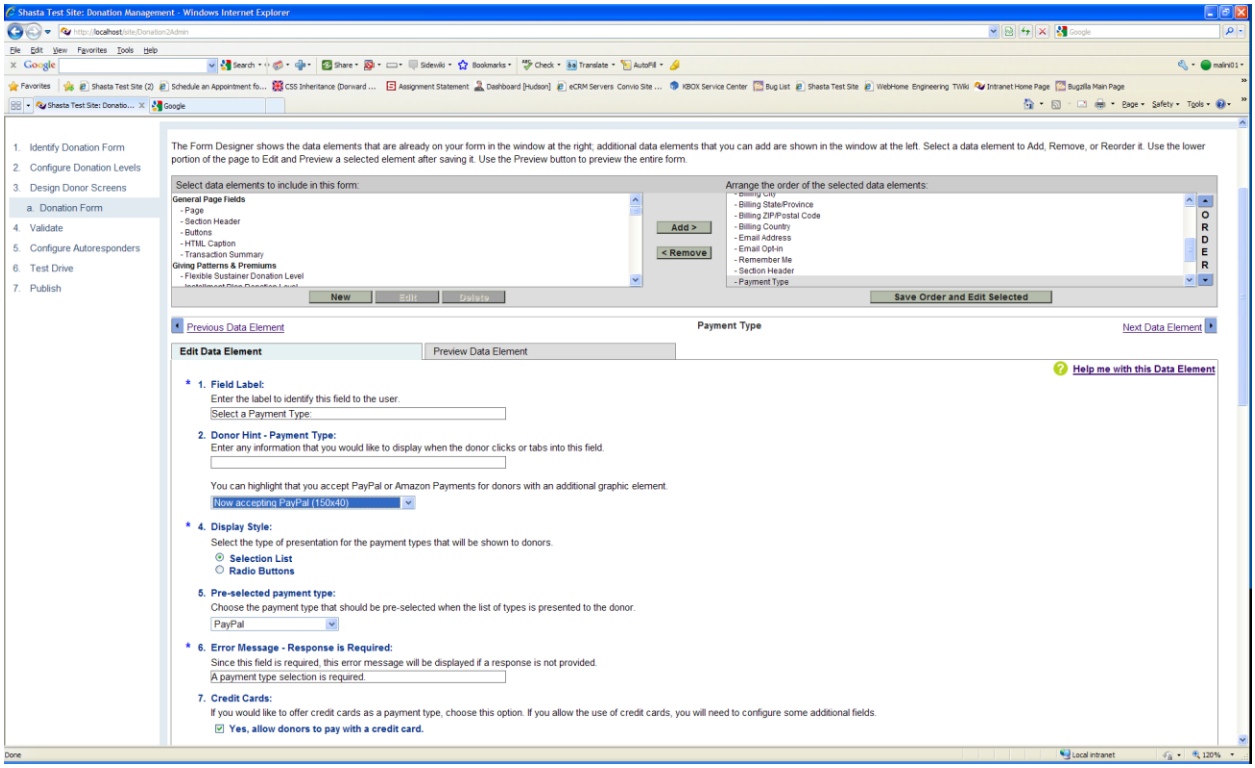
4. 

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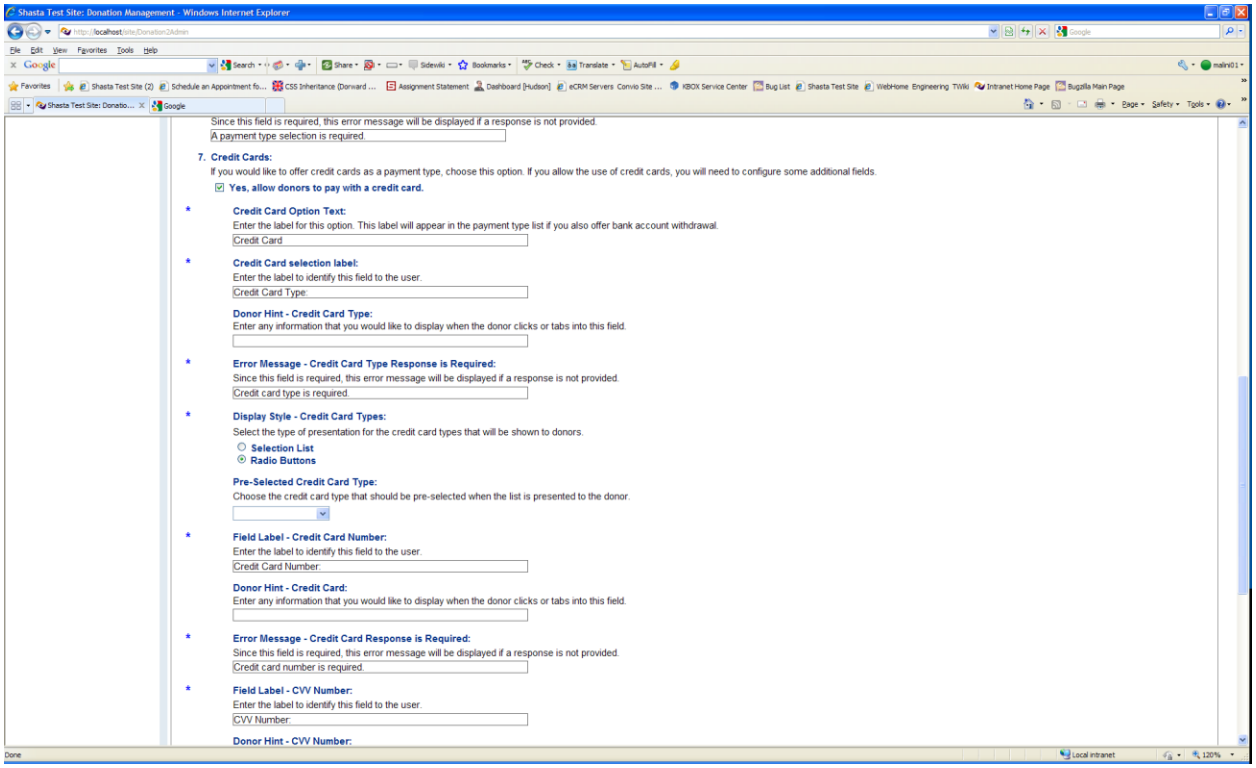

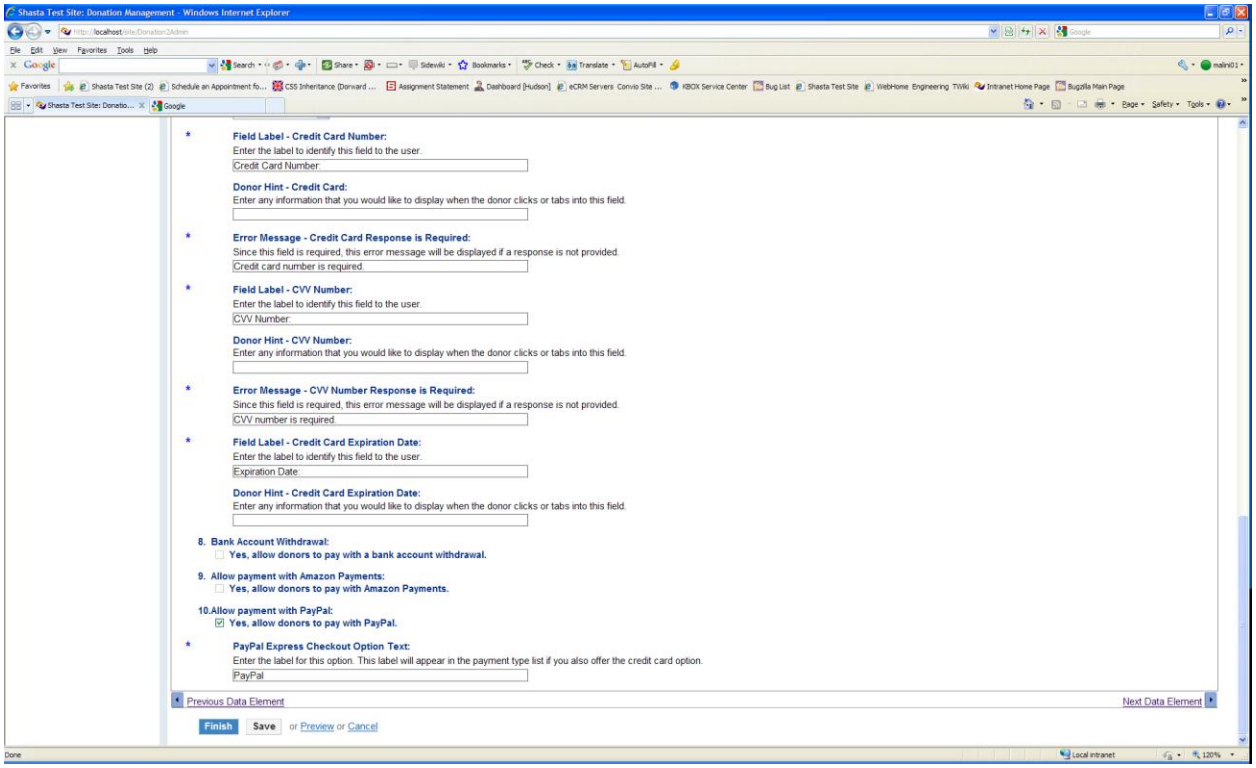

Note: Look at data elements 3, 5 and 10 with PayPal Enabled

- Additional Graphic should default to – "Now accepting paypal (150x40)
- Preselected Payment type should default to – "PayPal"
- Allow payment with PayPal should be "checked automatically"

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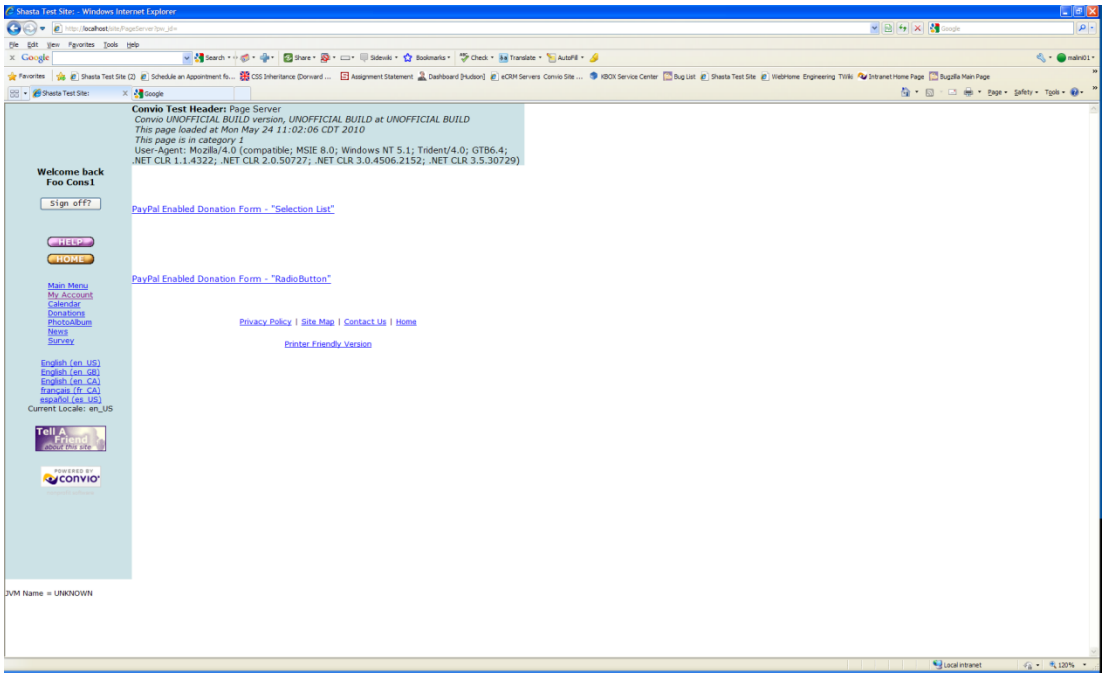
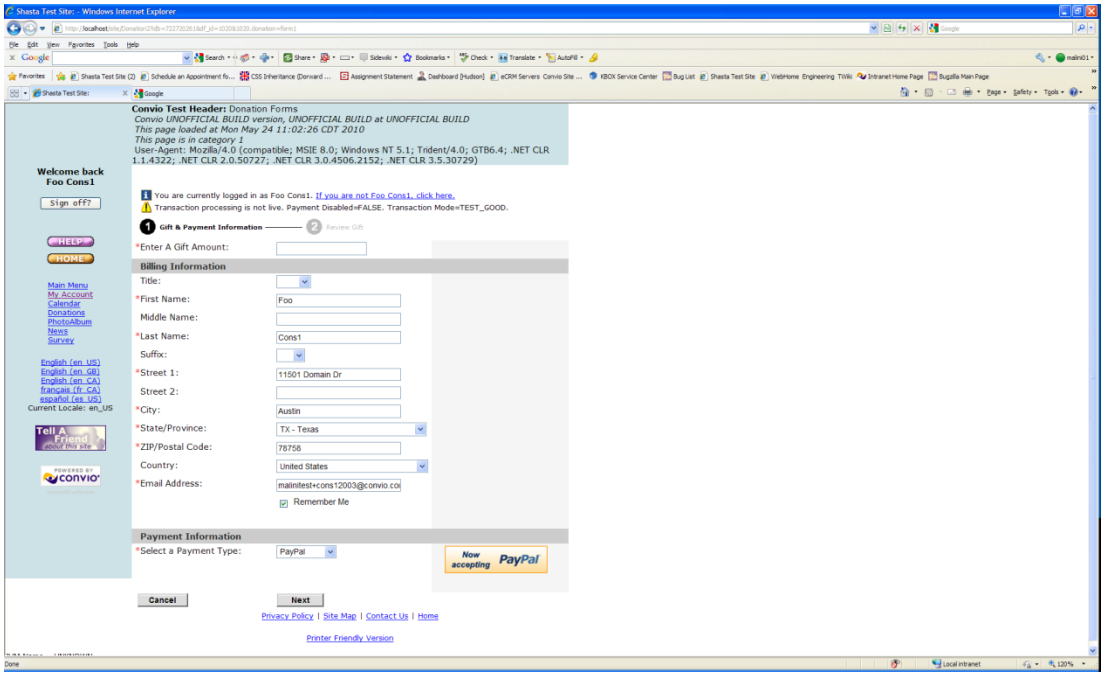
- Create another donation form “PayPal-Enabled Test Donation Form – Radio” with a minor modification: set data element 4 to “Radio Buttons” instead of “Selection List”

User/Cons - PayPal-Enabled Donation Form

1. 

For the “PayPal Enabled Donation Form – Selection List”, you should see a drop down list of payment types, with “PayPal” as the default. You should also see the “Now accepting PayPal” additional graphic next to the payment type drop down.

2. 

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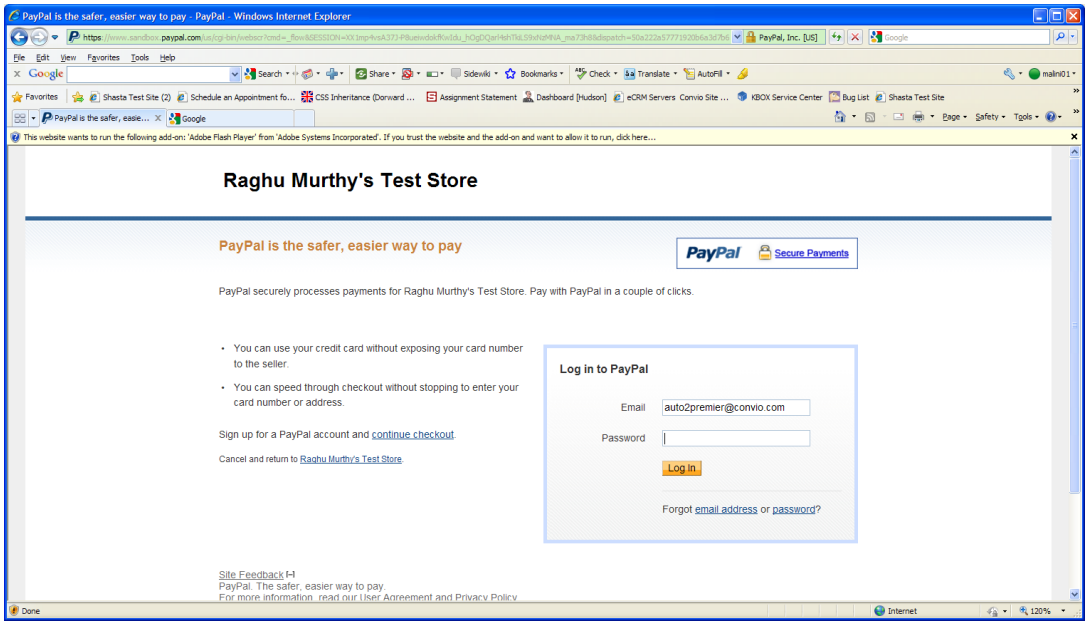
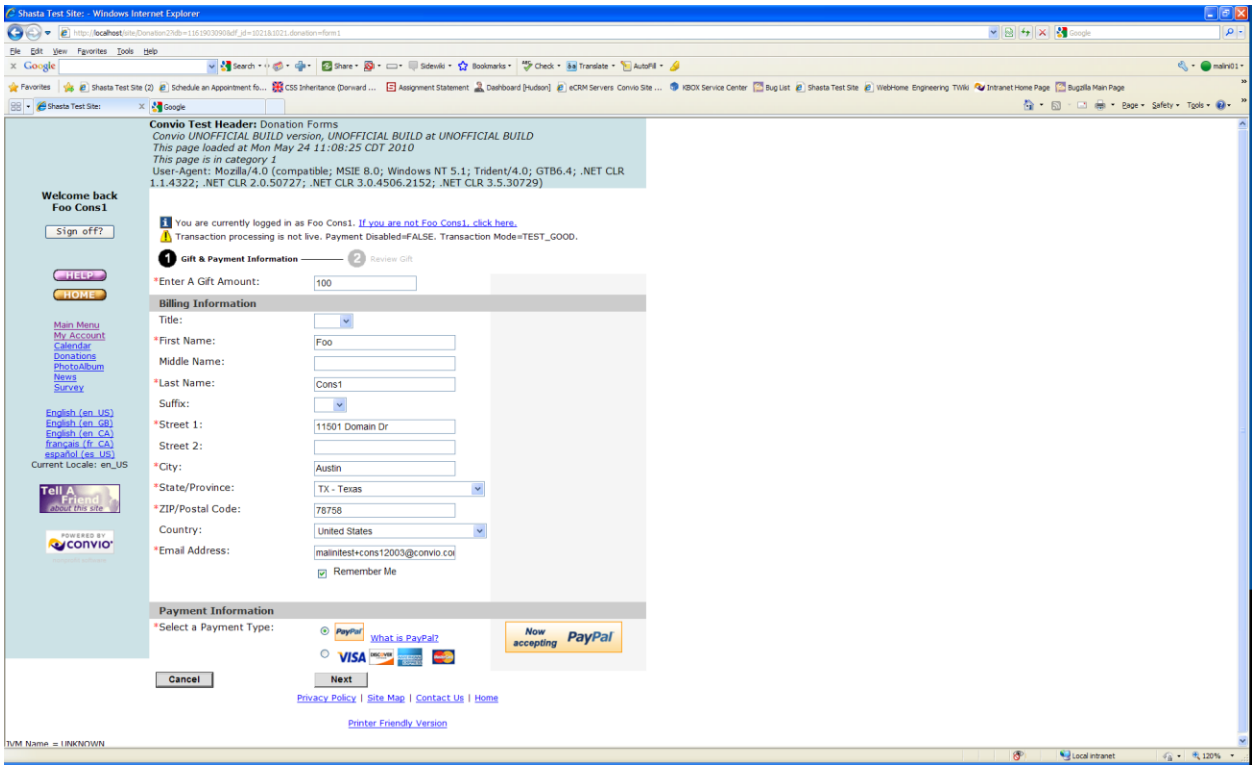
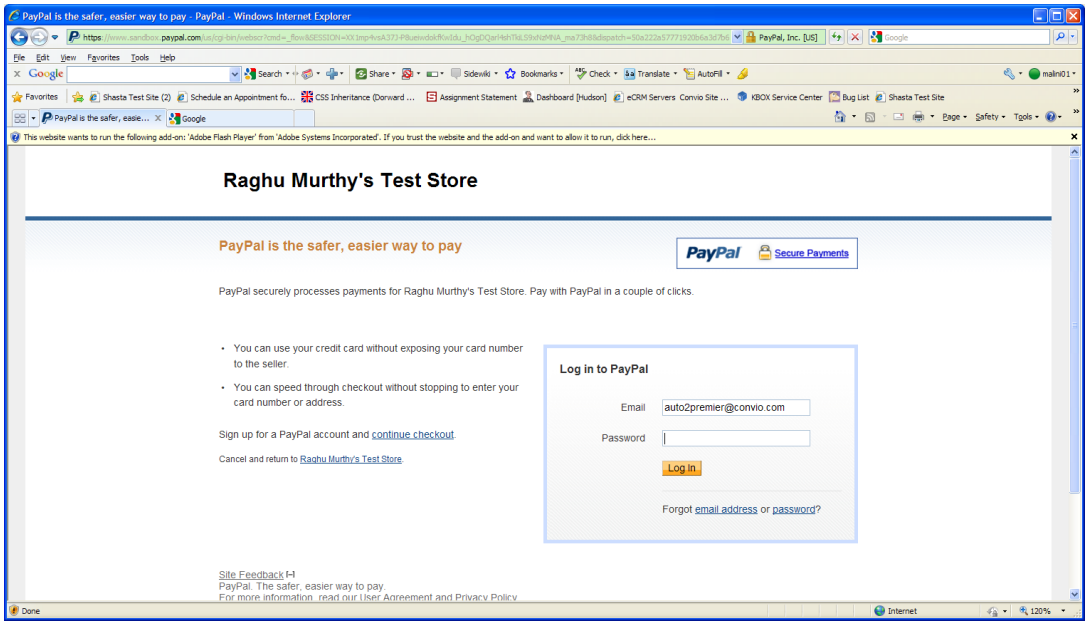
3. Clicking the “Next” button should take you directly to PayPal Login page.



4. For the “PayPal-Enabled Donation Form – Radio Button,” you should see a list of payment types, with “PayPal” selected and as the first payment type displayed on the list. You should also see the “Now accepting PayPal” additional graphic next to the payment type List

5. 

6. Clicking the "Next" button should take you directly to PayPal Login page.



FAQs

How do I set up a PayPal Business account?
Clients will complete this step on their own and can start immediately. Clients can go to https://www.paypal.com/nonprofit and follow the instructions there. **Note:** You will need to provide the email address used to create the PayPal business account to Convio Client Support so they can send it to PayPal for the next step.

What if I have more questions for PayPal?
You can let Convio Client Support know and they can put you in direct contact with PayPal.

Will I need to update my DataSync?
Yes, your DataSync will need to be updated to track the PayPal transactions accurately in your offline system.

How much will this cost?
Convio will not charge for the step to enable this feature. There may be costs associated with setting up a PayPal Business account, but you will manage those directly with PayPal.

Can I offer PayPal as a payment option in TeamRaiser or Personal Fundraising?
TeamRaiser and Personal Fundraising donations use Donation2 forms, so you should be able to use this feature for TeamRaiser and Personal Fundraising donations. However, it is not supported for TeamRaiser or Personal Fundraising Registration. That functionality will need to be prioritized and included in a future release.

Can I modify the way the PayPal option appears on my donation form?
Yes, you can choose which payment option is selected by default, whether the options are a dropdown or radio buttons. You can even select which PayPal logo you want to appear on the form. See screenshots below to learn where to make that selection.

Can we process recurring transactions with PayPal?
Yes, but your Business account must be set up to accept recurring transactions. Clients will work with PayPal to enable that option.

Where can I learn more about PayPal?
You can review the FAQ to learn more details from PayPal: http://community.customer.convio.com/docs/DOC-2646 .

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