



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.

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. Identify Campaign

2. Choose Financial Options

3. Specify Groups and Notifications

4. Campaign Type

1. Name: The campaign name identifies the campaign to administrators and constituents. PayPal Enabled Test Campaign

2. Description: The campaign description is used internally for further identification.

3. Security Category: The campaign Security Category controls who in your organization has permission to edit and manage the campaign. This will also determine the initial security value for new forms and levels. General

4. Campaign Type: The campaign type is used internally to organize similar campaigns. It will only be seen by you and other administrators. Choose an existing value

Next Save or Cancel

1.

Shasta Test Site: Donation Management - Windows Internet Explorer

http://localhost:8080/DonationManagement/campaign_fm_paction=paypal&id=0022

File Edit View Favorites Tools Help

Google

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Translate

AutoFill

Shasta Test Site (2) Schedule an Appointment... CSS Inheritance (Forward... Assignment Statement Dashboard (Public) eCRM Servers Convo Site... eCRM Service Center Bug List Shasta Test Site WebHome Engineering Tools Intranet Home Page Bugzilla Main Page

Shasta Test Site: Donatio... Google

All Centers | Switch to another center

Hello, System Administrator CONVIO ADMIN on mkesavan | Help | Log Out | Login As Admin
Spam Complaints: unknown

Content Fundraising Advocacy Email Constituent360 Library Data Management Setup

Donation Management

Online Giving Donation Classic Pending Contributions Sustaining Gifts Designated Giving Membership Types Donation Reports General Configurations

Campaigns > PayPal Enabled Test Campaign

1. Identify Campaign
2. Choose Financial Options
3. Specify Groups and Notifications

1. Merchant Account:
This is the account into which the system will deposit all money collected from the forms associated with this campaign.
PayPal Enabled Merchant Account
2. Fundraising Goal:
The fundraising goal can be used on a campaign thermometer to motivate your constituents and track your fundraising progress.
3. Maximum Donor-Entered Amount:
The maximum donor-entered amount will prevent any donor-entered fields on donation forms in this campaign from exceeding the amount that you enter here. This is especially important for donation forms that will be used for political campaigns.

Next Save or Cancel

2.

3. Create Donation Form for this Campaign

Shasta Test Site: Donation Management - Windows Internet Explorer

http://localhost:8080/DonationManagement/campaign_fm_paction=paypal&id=0022

File Edit View Favorites Tools Help

Google

Search

Share

Sidewiki

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Check

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Shasta Test Site (2) Schedule an Appointment... CSS Inheritance (Forward... Assignment Statement Dashboard (Public) eCRM Servers Convo Site... eCRM Service Center Bug List Shasta Test Site WebHome Engineering Tools Intranet Home Page Bugzilla Main Page

Shasta Test Site: Donatio... Google

All Centers | Switch to another center

Hello, System Administrator CONVIO ADMIN on mkesavan | Help | Log Out | Login As Admin
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Content Fundraising Advocacy Email Constituent360 Library Data Management Setup

Donation Management

Online Giving Donation Classic Pending Contributions Sustaining Gifts Designated Giving Membership Types Donation Reports General Configurations

Campaigns > PayPal Enabled Test Campaign > Create a Donation Form

1. Select a name for your new Donation Form.
2. Select a Donation Form Template to Use

1. Name:
The form name is used internally. It will only be seen by you and other administrators.
PayPal Enabled Test Donation Form

Next or Cancel

Shasta Test Site: Donation Management - Windows Internet Explorer

File Edit View Favorites Tools Help

Search

Share

Sidebar

Bookmarks

Check

Translate

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Shasta Test Site: Donato...

1. Identify Donation Form

2. Configure Donation Levels

3. Design Donor Screens

a. Donation Form

4. Validate

5. Configure Autoresponders

6. Test Drive

7. Publish

The Form Designer shows the data elements that are already on your form in the window at the right, additional data elements that you can add are shown in the window at the left. Select a data element to Add, Remove, or Reorder it. Use the lower portion of the page to Edit and Preview a selected element after saving it. Use the Preview button to preview the entire form.

Select data elements to include in this form:

General Page Fields

- Page
- Section Header
- Buttons
- HTML Caption
- Transaction Summary

Giving Patterns & Premiums

- Flexible Sustainer Donation Level
- Individual One-Time Donation Level

Buttons: New Edit Delete

Arrange the order of the selected data elements:

- Email Opt-In
- Billing State/Province
- Billing ZIP/Postal Code
- Billing Country
- Email Address
- Email Opt-In
- Remember Me
- Section Header
- Payment Type

Buttons: Add > < Remove Save Order and Edit Selected

Previous Data Element Payment Type Next Data Element

Edit Data Element Preview Data Element

1. Field Label:
Enter the label to identify this field to the user.
Select a Payment Type:
[Text Box]

2. Donor Hint - Payment Type:
Enter any information that you would like to display when the donor clicks or tabs into this field.
[Text Box]

You can highlight that you accept PayPal or Amazon Payments for donors with an additional graphic element.
[Now accepting PayPal (150x40)]

4. Display Style:
Select the type of presentation for the payment types that will be shown to donors.
☒ Selection List
☐ Radio Buttons

5. Pre-selected payment type:
Choose the payment type that should be pre-selected when the list of types is presented to the donor.
[PayPal]

6. Error Message - Response is Required:
Since this field is required, this error message will be displayed if a response is not provided.
A payment type selection is required.
[Text Box]

7. Credit Cards:
If you would like to offer credit cards as a payment type, choose this option. If you allow the use of credit cards, you will need to configure some additional fields.
☒ Yes, allow donors to pay with a credit card.

Help me with this Data Element

Done Local intranet 120%

4.

Shasta Test Site: Donation Management - Windows Internet Explorer

Since this field is required, this error message will be displayed if a response is not provided.
A payment type selection is required.

7. Credit Cards:
If you would like to offer credit cards as a payment type, choose this option. If you allow the use of credit cards, you will need to configure some additional fields.

☒ Yes, allow donors to pay with a credit card.

* Credit Card Option Text:
Enter the label for this option. This label will appear in the payment type list if you also offer bank account withdrawal.
Credit Card

* Credit Card selection label:
Enter the label to identify this field to the user.
Credit Card Type

Donor Hint - Credit Card Type:
Enter any information that you would like to display when the donor clicks or tabs into this field.

* Error Message - Credit Card Type Response is Required:
Since this field is required, this error message will be displayed if a response is not provided.
Credit card type is required.

* Display Style - Credit Card Types:
Select the type of presentation for the credit card types that will be shown to donors.
☐ Selection List
☒ Radio Buttons

Pre-Selected Credit Card Type:
Choose the credit card type that should be pre-selected when the list is presented to the donor.
[Dropdown]

* Field Label - Credit Card Number:
Enter the label to identify this field to the user.
Credit Card Number

Donor Hint - Credit Card:
Enter any information that you would like to display when the donor clicks or tabs into this field.

* Error Message - Credit Card Response is Required:
Since this field is required, this error message will be displayed if a response is not provided.
Credit card number is required.

* Field Label - CVV Number:
Enter the label to identify this field to the user.
CVV Number

Donor Hint - CVV Number:

Field Label - Credit Card Number:
Enter the label to identify this field to the user.
Credit Card Number

Donor Hint - Credit Card:
Enter any information that you would like to display when the donor clicks or tabs into this field.

* Error Message - Credit Card Response is Required:
Since this field is required, this error message will be displayed if a response is not provided.
Credit card number is required.

* Field Label - CVV Number:
Enter the label to identify this field to the user.
CVV Number

Donor Hint - CVV Number:
Enter any information that you would like to display when the donor clicks or tabs into this field.

* Error Message - CVV Number Response is Required:
Since this field is required, this error message will be displayed if a response is not provided.
CVV number is required.

* Field Label - Credit Card Expiration Date:
Enter the label to identify this field to the user.
Expiration Date

Donor Hint - Credit Card Expiration Date:
Enter any information that you would like to display when the donor clicks or tabs into this field.

8. Bank Account Withdrawal:
☐ Yes, allow donors to pay with a bank account withdrawal.

9. Allow payment with Amazon Payments:
☐ Yes, allow donors to pay with Amazon Payments.

10. Allow payment with PayPal:
☒ Yes, allow donors to pay with PayPal.

* PayPal Express Checkout Option Text:
Enter the label for this option. This label will appear in the payment type list if you also offer the credit card option.
PayPal

Previous Data Element Next Data Element

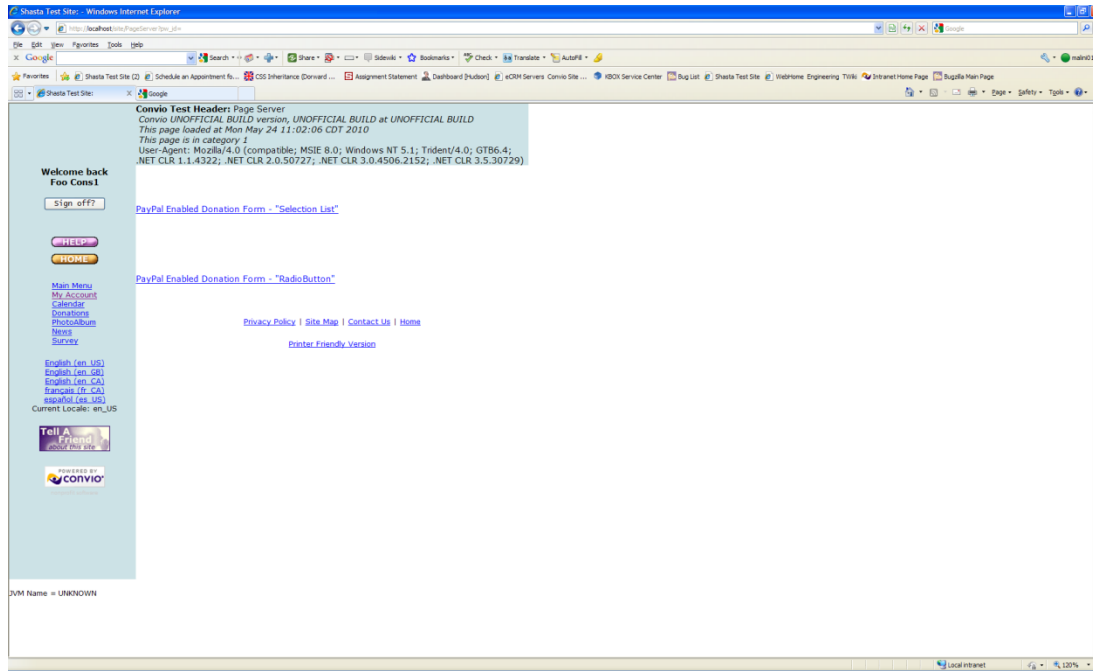
Finish Save or Preview or Cancel

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”

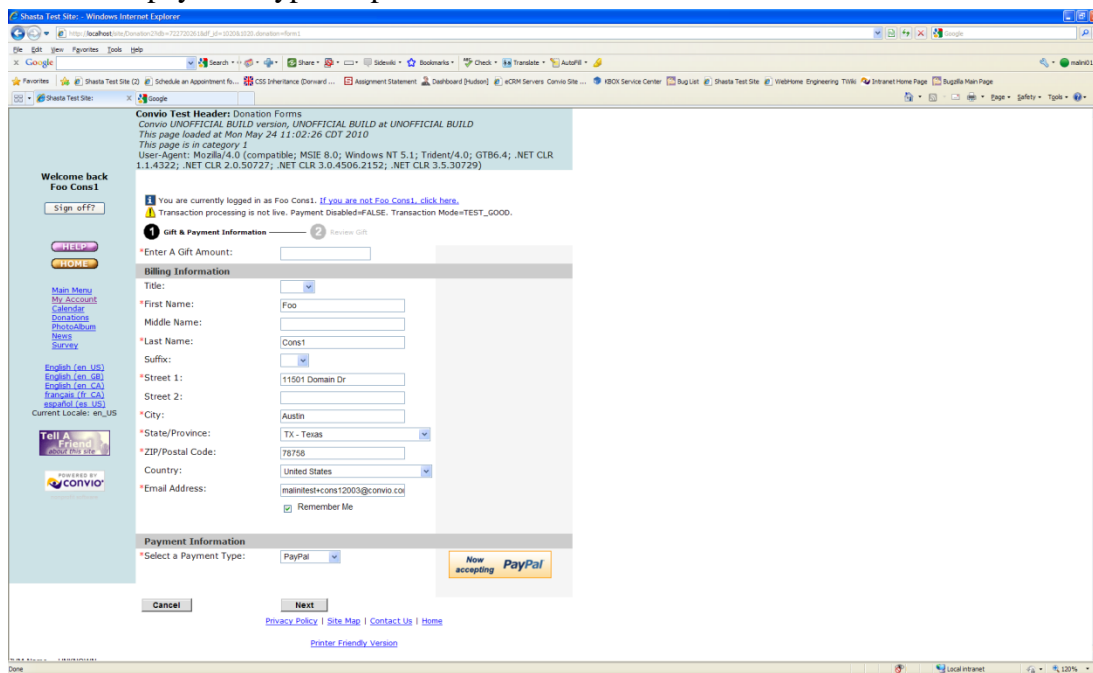
- Create another donation form “PayPal-Enabled Test Donation Form – Radio” with a minor modification: set data element 4 to “Radio Buttons” instead of “Selection List”

User/Cons - PayPal-Enabled Donation Form



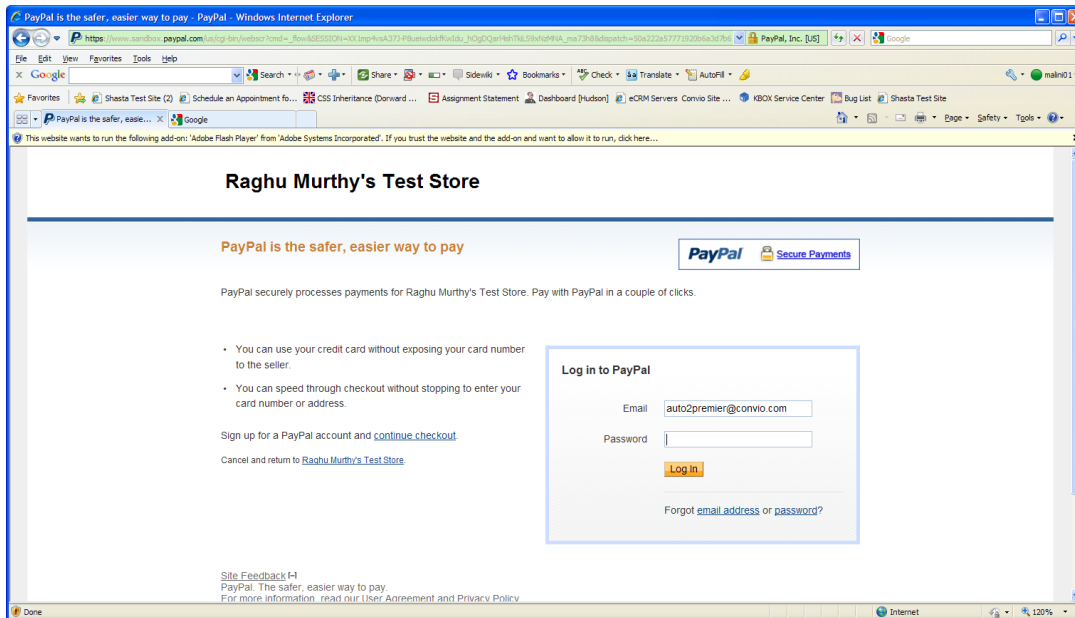
1.

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.

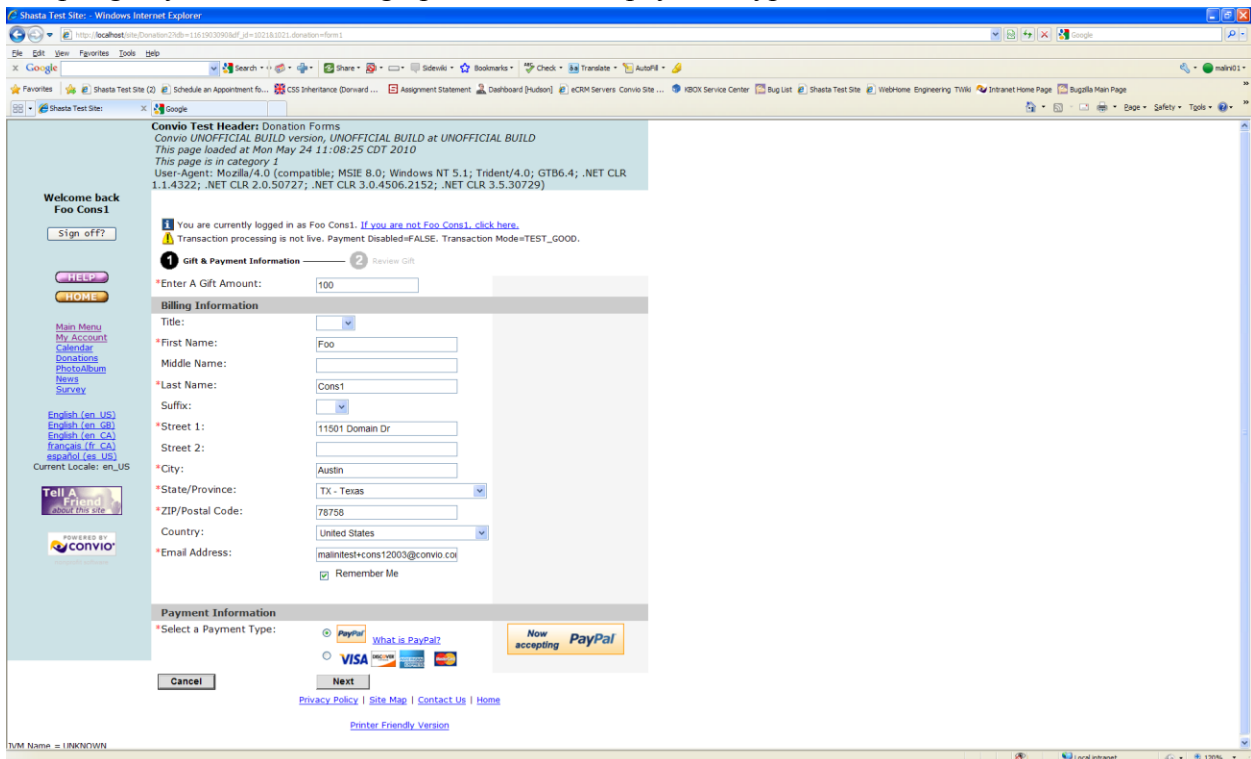


2.

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

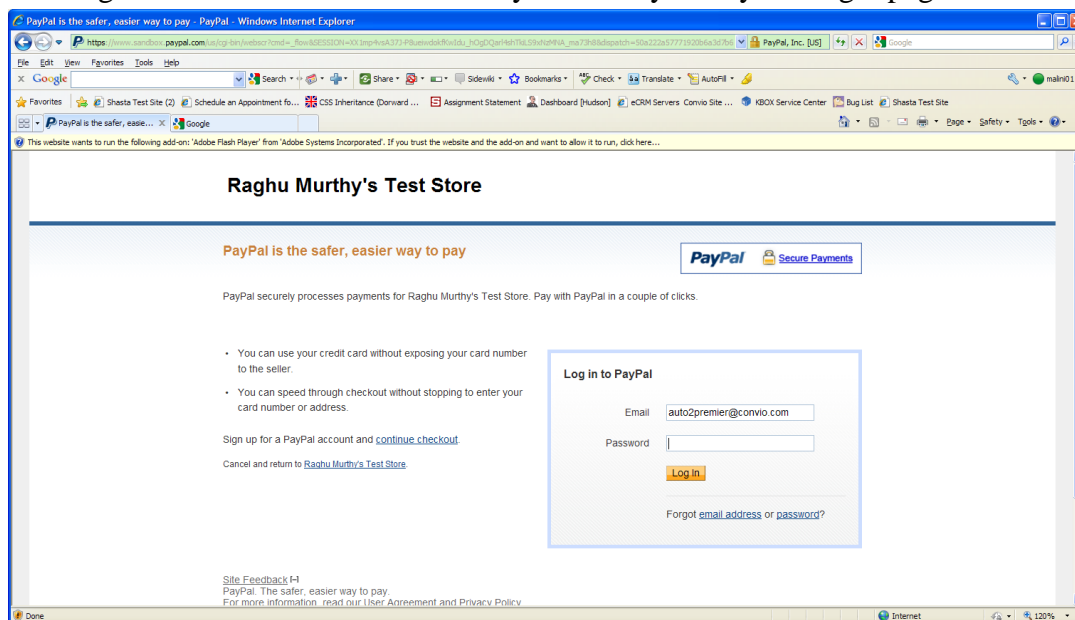


4. For the “PayPal-Enabled Donation Form – Radio Button,” you should see a list of payment types, with “PayPal” selected and as the first payment type displayed on the list. You should also see the “Now accepting PayPal” additional graphic next to the payment type List



5. TUM Name = IINKN7WIN

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>.

