

Taking Payments with Ivolunteer.com

Ivolunteer.com is excited to announce that we can now pass credit and debit card payments along with the sign-up process!

Examples:

- sign-up to volunteer and pre-pay for lunch,
- pre-pay reservations for yourself and others guests in one transaction,
- make a donation,
- pay membership dues,
- sell raffle tickets along with registrations.

How Payments Work in Ivolunteer.com

Your participants (e.g. volunteers, guests, etc.) sign-up for an event the same way they normally would, but also provide credit or debit card billing information. Ivolunteer.com records the payment collected with the sign-up, confirms the participant with a successful payment, and all money goes directly into your **PayPal** or **Click&Pledge** account*.

New custom prompt MONEY fields can request a simple fixed amount, or calculate an amount from selection(s) a participant makes for other prompts on the sign-up form.

You can require participants to pay in advance, or (optionally) give them the choice to bring payment “manually” to your event.

To receive advance payments, you also need at least one of the following payment gateway accounts:

- **A PayPal account.** This is the probably fastest, easiest and least expensive (i.e. no monthly fees) way to take infrequent payments. Ivolunteer.com redirects the participant to the PayPal Express Checkout where PayPal collects billing information. Participants are able to pay and do not need to create the own PayPal account.



CLICK&PLEDGE

- **A Click&Pledge account.** This is a low-fee online merchant account (popular with non-profits) good for any organization that needs to take online payments on a regular basis. Ivolunteer.com prompts for billing information directly in the sign-up form and then securely sends the information to your Click&Pledge account.

* Ivolunteer.com does not process payments itself, but instead passes billing information securely to your payment gateway account. You must set up your own account with one or more of the supported payment gateways, currently PayPal or Click&Pledge. Authorize.net is likely to be supported in the future.

Ivolunteer.com does not support recurring payments and does not store credit card data in your Ivolunteer.com account. We store a transaction number so that you can cross-reference sign-ups to transactions in your payment gateway account.

Taxes and Tax Deductible Amounts

You can optionally designate a percentage that will be shown to your participants as “tax deductible.” It is your responsibility to collect and pay any and all taxes.

Refunds

Administrators are able to issue refunds for previously successful payments from Ivolunteer.com’s Manage tab. Partial refunds are not supported, and aged or certain transactions may not be eligible for refunding from within Ivolunteer.com. Such refunds should be managed with your payment gateway account.

Cancellations

Cancellations are independent of Refunds. Self-cancellations (if you allow them) do not automatically issue refunds. It is recommended that you disable self-cancellations (under the event Details tab) when taking payments. If a refund is issued from within iVoluneterOnline it must be done before the Cancellation.

How Taking Payment Affects The Sign-up Confirmation Email

Participants who provide the SAME sign-up and billing email addresses when they sign-up are automatically confirmed when a payment is successful (unless you have Settings > Emails > Confirmation Mode set to Always require confirmation).

Participants who provide a sign-up email DIFFERENT from the billing email, and have never confirmed their email address before, should receive the traditional Confirmation Email, which they need to confirm. However, unlike payment-less unconfirmed slots, when a successful payment is affiliated with a slot, that slot will not be eligible for another participant to take. *Paid* but *unconfirmed* slots are annotated with a \$ symbol in the Manage tab.

Confirmation Notification Email and Reports

When one or more MONEY prompts are added to an event, confirmation emails’ SLOT DESCRIPTION and reports’ CUSTOM VALUES automatically include **Payment Method**, **Payment Status** and **Payment Total**.

TIP: Guarantee that participants will always be sent a confirmation email showing their payment status by checking “Always send Confirmation Notification to participant” (under Settings > Emails).

The Excel versions of reports have been improved so that Excel will appropriately identify numeric formats of MONEY and other numeric fields. This makes it more convenient to utilize Excel formulas.

A new **Payment Log** report displays detail about each transaction, including declines, refunds, and an invoice number to cross-reference transactions with your payment gateway account.

What Does It Cost You to Take Payments Through Ivolunteer.com?

Ivolunteer.com does not add or take any per-transaction fees for payments. This can make Ivolunteer.com a cost saving alternative to other ticketing and reservation systems. However be aware that PayPal or Click&Pledge charge transaction and/or other fees (independent of Ivolunteer.com) that may be assessed as a result of transactions initiated from Ivolunteer.com. It is your responsibility to understand and accept all fees charged by your payment gateway. Consult PayPal or Click&Pledge for details on their fees.

Ivolunteer.com plans to charge a small subscription premium to have the Payments feature available in an Ivolunteer.com account (testers may have that waived for at least a few years).

Privacy and Security of Billing Information



In general, Ivolunteer.com is PCI DSS certified and routinely tested to ensure the privacy and security of any data handled by Ivolunteer.com. Ivolunteer.com never stores essential billing data and logs only minimal information about the payment, such as email, status, unique invoice and transaction numbers that may be used by you to reconcile and research payments with PayPal or Click&Pledge. Ivolunteer.com does not have administrative access to your PayPal or Click&Pledge account.

Specifically, for PayPal, Ivolunteer.com never directly handles essential billing data. Ivolunteer.com redirects participants to PayPal's web site or app, participants enter all essential billing data at PayPal, and then PayPal sends Ivolunteer.com a safe token to reference the transaction.

For Click&Pledge, participants enter essential billing data into the secure sign-up form on Ivolunteer.com's site, after which Ivolunteer.com passes it securely to Click&Pledge. Ivolunteer.com does not store any credit card data.

Additional Terms, Conditions of Use, and Disclaimer

By using the Payments feature in Ivolunteer.com, in addition to Ivolunteer.com's existing Terms and Conditions of Use (<http://79ware.ivolunteer.com/termsfuse.html>), you agree that in no event shall Ivolunteer.com, its employees or agents, be held liable for any damage or financial loss arising out of the use of Ivolunteer.com for taking payments. This includes but is not limited to any failure to receive payments or failure to receive expected payment amounts, regardless of the reason including but not limited to configuration issues, failing to turn off test mode, refunds, reversals, viruses, malware, system failures, reporting errors, misunderstandings, or criminal activity based eternally to Ivolunteer.com. When you are using Ivolunteer.com to take payments, it is your sole responsibility to log into your PayPal or Click&Pledge account to verify that it is actually receiving the payment transactions that you expect. You are responsible for any gateway or other fees charged to you by PayPal or Click&Pledge that arise from transactions initiated from Ivolunteer.com, including but not limited to payments, failed payments, refunds and failed refunds. You are responsible for collecting and paying any current and future taxes affiliated with your transactions. Furthermore you agree that in no event and no way shall Ivolunteer.com, its employees or agents, be responsible for fulfillment of goods, services, attendances or any liabilities to your participants.

The Ivolunteer.com system, including the Payments, feature has been tested extensively, but is provided “as is” without warranty of any kind as stated in the DISCLAIMER OF WARRANTIES section of the aforementioned existing Terms and Conditions.

Configuring Ivolunteer.com to use your PayPal account

First, configure your PayPal account to give Ivolunteer.com permission to electronically send payments and potentially issue refunds for those payments.

1. Log into your PayPal account. Under the “Tools” menu item, select “All Tools.” Click the “API Credentials” tool.
2. Under “API Access | Pre-built payment solution” click the “Grant API permission” link. *Note: If you have previously added an API you will also see “Manage API permissions”. You may click that and then click “Add API” button.*
3. For the “Third Party Permission Username” field enter “**paypal_api1.79ware.com**” and press “Lookup”.
4. Under “Available Permissions” add (check) these two permissions:
 - a. Use Express Checkout to process payments
 - b. Issue a refund for a specific transaction
5. Press the “Add” button at the bottom.

Second, add your PayPal address to your Ivolunteer.com account (*Figure 1*).

1. Log into your Ivolunteer.com account as the primary administrator.
2. Go to Organization > Settings tab > Payments sub-tab > PayPal section.
3. Add your PayPal email address to “PayPal Address to Receive Payments.”
4. Press Save.

Optional: if you want to be able to test mock payments, add your PayPal sandbox email address. You can set up a Sandbox test account with PayPal. See: <https://www.sandbox.paypal.com/> for more information on setting up a sandbox account.

Configuring Ivolunteer.com to use your Click&Pledge account

Add your Click&Pledge Account ID to your Ivolunteer.com account (*Figure 1*).

1. Find your Click&Pledge Account ID and API Account GUID. This should be in your Click&Pledge account under Account Info > Profile > Your Profile > API Information.
2. Log into your Ivolunteer.com account as the primary administrator.

3. Go to Organization > Settings tab > Payments sub-tab > Click&Pledge section.
4. Add both your Click&Pledge Account ID and API Account GUID.
5. Press Save.

Display/Layout Emails Date/Time Logo Colors Tracking **Payments**

Take Payments (BETA)

Take payments as the last step in the sign-up process. Currently, taking payments through your own PayPal account, Click&Pledge account or providing a message manually receiving payments are supported. **If you would like to participate in testing this new feature please contact support.**

Enable Taking Payments: Maximum Gateway Transaction Allowed (contact support to change): \$2,500.00

Manual Payments

Tell participants how to bring you a payment manually under Settings > Prompts to tell participants how to pay.

PayPal

Receive payments from participants through PayPal into your PayPal account. Participants will be able to pay you using their PayPal account or a debit/credit card without creating a PayPal account. You must configure your PayPal account to provide iVolunteerOnline.com API Access to Use Express Checkout.

PayPal Address to Receive Payments: Sandbox Address to Receive Test Payments:

Click & Pledge

Receive credit/debit card payments from participants into your Click & Pledge account.

C&P Account ID: API Account GUID:

Figure 1 – Configure iVolunteer.com to use your Payment Gateway

Configuring an Event to Take Payments

Administer the event. Go to Setting > Payments (*Figure 2*). Check which Payment Methods (i.e. Manual, PayPal, etc.) you want your participants to be able to choose from. You must check at least one method. You can edit what the instructions for each Payment Method say to your participants. Press Save.

The screenshot shows the 'Payments' configuration interface. At the top, there are navigation tabs: Display, Layout, Prompts, Info Messages, Emails, Date/Time, Logo, and Payments (which is highlighted). Below the tabs is the 'Ways to Receive Payments' section. A grey box contains the text: 'Configure which payment gateway options are available when there are MONEY prompts.' Below this, there is a checkbox for 'Send payments to gateways in TEST MODE:'. Under 'Manual Payments', there is an unchecked checkbox, a text input for 'Option appears as:' containing 'Manual', an unchecked checkbox for 'Default Option:', and a text input for 'Instructions to Guest:' containing 'Bring cash when you arrive.'. Under 'PayPal Payments', there is a checked checkbox, a logo for PayPal, Visa, MasterCard, and Discover, a text input for 'Option appears as:' containing 'PayPal / Debit / Credit Card', a checked checkbox for 'Default Option:', and a text input for 'Instructions to Guest:' containing 'You will be temporarily redirected to PayPal to provide payment information. A PayPal account is required.'. At the bottom of the PayPal section, there are three checkboxes: 'Require PayPal account:' (unchecked), 'Prefer PayPal account:' (unchecked), and 'Finish on PayPal:' (checked).

Figure 2 – Select which Payment Gateway an Event will use in the Payments tab

When using PayPal, there are some options:

- **Require PayPal account:** Leave this unchecked if you want participants to be able to pay you without having their own PayPal account. The transaction still takes place through PayPal, just without the participant being required to create a PayPal account.
- **Prefer PayPal account:** Leave this unchecked if the default PayPal screen should assume the participant is more likely to want to pay with a card, without creating a PayPal account.
- **Finish on PayPal:** Check this if the payment is complete when the participant successfully provides PayPal with billing information. The participant is returned to your Ivolunteer.com event and a message is displayed indicating a successful payment. Uncheck this if the participant is returned to your event and prompted to review the sign-up/purchase one last time before the payment is completed.

WARNINGS

Self-cancellations by participants do NOT refund payments. Therefore it is recommended that you disable **Self Cancellations** for events that take payments: Under the Details tab set **Self Cancellations End to Self-Cancellations are Not Allowed**. You can set the specific text that participants see regarding cancelations for an event under Settings > Layout > Cancel Instructions. **Administrators can refund payments** under the **Manage** tab, *as long as the refund is made before the participant is canceled from the slot.*

Currently Mobile Optimization is disabled for events that take payments (i.e. Settings > Display > Optimize on Mobile Devices). This restriction will be removed soon.

Require HTTPS when you are taking payments. Go to the Organization menu > Settings tab > Display Layout subtab. Check "Require secure HTTPS protocol for Home and Event pages." This will soon be automatically enabled.

Adding a MONEY Prompt to an Event

Add a Simple MONEY Prompt

While administering an event, go to Setting > Prompts (Figure 3). Press Add Prompt. If you do not want the participant to be able to change the amount, check “Fixed.” In Figures 3 and 4 we’re collecting \$5.00 from each participant to cover lunch. Figure 4 shows what the participant sees. For another example, if you are collecting a Donation you might leave “Fixed” unchecked so that the participant can donate whatever amount they want; possibly set a Minimum, and key 100 for a tax deductible percentage.

Figure 3 – A Simple, Fixed MONEY prompt

Figure 4

You may add more than one MONEY prompt. The total in Figure 4 is the total of all MONEY prompts.

Whenever you add a MONEY prompt, two additional prompts are also added, PAYMENT METHOD and PAYMENT STATUS (Figure 5). If you have more than one Payment Method selected in the Payments tab then PAYMENT METHOD will be a dropdown list for your participants to choose how to pay. So, for example, you could provide the option to bring a payment to the event or pay now with a credit card.

Figure 5 – Payment Method and Payment Status are automatically added with MONEY prompt(s)

By default “Email” is checked beside PAYMENT STATUS so that Payment Status is included in email [SLOT] and [SLOT_LIST] and [SLOT_LIST_WITH_DETAIL] variables. Those variables may be in confirmation and reminder emails. In Figure 5, Lunch has been checked so that the amount selected for Lunch will be included in the email as well.

The value of PAYMENT STATUS is automatically set and cannot be changed for gateway-made payments. The Administrator is able to choose a PAYMENT STATUS for participants added in the Manage tab.

Add a Calculated MONEY Prompt

While administering an event, go to Setting > Prompts. First add either a NUMBER or a DROPDOWN prompt that has numeric list values (*Figure 6*). In this example we make it required.

Then add a MONEY prompt (*Figure 7*):

1. Press Add Conditional Amount.
2. For “If Prompt” select the label of the other prompt.

TIP: You may also create a condition on the slot date or time, or the current date or time.

3. For “Match” and “Value” select the condition that must be true of the other prompt’s value to use this condition’s amount.
4. For “Then” select how the conditional Amount is applied when “Prompt-Match-Value” is true:

“Then”	The MONEY prompt’s value equals...
=	the specified conditional Amount (overrides any previous matched conditions)
=V*	the matched value of the other prompt <i>times</i> the specified conditional Amount (overrides any previous matched conditions)
+	the amount calculated so far <i>plus</i> the specified conditional Amount
+V*	the amount calculated so far <i>plus</i> the matched value of the other prompt <i>times</i> the specified conditional Amount
*	the amount calculated so far <i>times</i> the specified conditional Amount
V	the amount calculated so far <i>times</i> the matched value of the other prompt <i>times</i> the specified conditional Amount

When there are multiple Conditional Amounts, *all conditions that match are applied in the order listed.*

In the *Figure 7* example, the “Lunch” MONEY prompt will calculate to be equal (=) to the value (V) of “Number of Lunches” times (*) the Amount of \$5.00.

Prompt
 Label: *
 Number of Lunches
 Short Description: Hyperlink
 How many lunches are you paying for?
 Required: Link to Database Field: NOT LINKED Overwrites Database:
 Type: DROPDOWN
 Use a DROPDOWN prompt to select from a list of items that you define.
 E.g. item1,item2,item3 (Note: no spaces used)
 Note: Use a comma (,) at the beginning to create a blank first item in the dropdown.
 E.g. ,item1,item2,item3
 Dropdown List Values (comma separated):
 0,1,2,3,4,5
 TIP: Precede list with a comma for no default selection.
 Block of Slots - This prompt's numeric value is the number of slots taken as a block by the Volunteer:

 OK Cancel

Figure 6 – Prompt MONEY will calculate from

Prompt
 Label: *
 Lunch
 Short Description: Hyperlink
 Required: Link to Database Field: NOT LINKED Overwrites Database:
 Type: MONEY
 Use a MONEY prompt when the ability to take a payment is desired.
 Amount: \$5.00 Conditionally Calculated: % Tax Deductible: e.g. 100.0
 Min: \$0.00 Max: e.g. \$1.00
Add Conditional Amount
 If Prompt: Number of Lunches Match: > Value: 0 Then: =V* Amount: 5.00
 OK Cancel

7 – Calculated MONEY Prompt

Figure

MONEY prompts (and any prompts used to calculate a MONEY prompt) values are locked and cannot be changed even by an Administrator once a payment has been made through a payment gateway.

Block of Slots (Figure 6) – “This prompt's numeric value is the number of slots taken as a block by the Volunteer.”

Block of Slots is a powerful option on NUMERIC and DROPDOWN prompts (that have numeric list values). The value selected determines the number of slots that one participant will take “as a block” when he or she signs up. You may only check “Block of Slots” for one custom prompt.

Although “Block of Slots” is not checked in the Figure 6 example, you would check it if the number lunches taken needs to count towards the number of slots taken---in which case you would set the number of Participants Needed (under Signup Sheet Design > some task tab > Edit Slot) to the number of total lunches available.

When a participant is signed up for a “block of slots” a “+#” appears after their name on the sign-up sheet and in email communications. # indicates the number of additional slots taken by the one participant.

Once a slot is signed-up the value of a “block of slots” prompt cannot be changed even by an Administrator. You must Cancel and re-add the sign-up if it must change (or you may Move it).

If you are using electronic sign-in (i.e. Sign-In tab), currently a participant signed up for a “block of slots” must be signed-in for the whole block at once.