

PayPal

Article Number

000087713

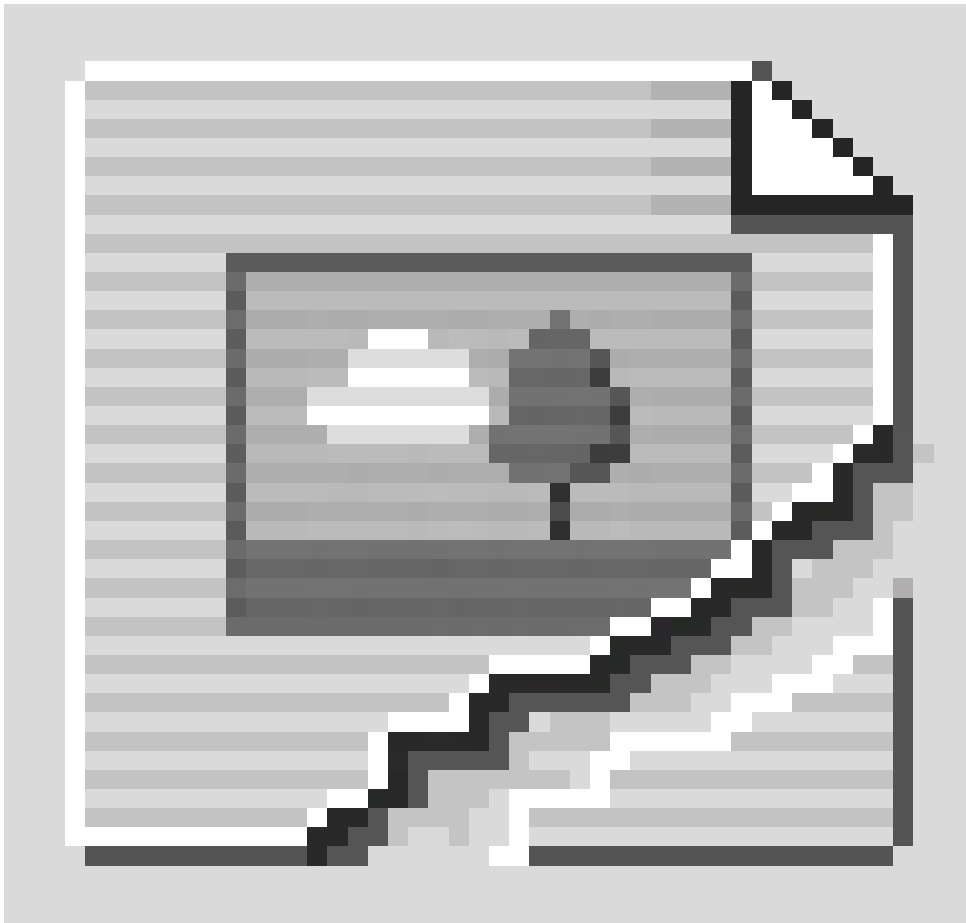
Information

Note: To offer Venmo as a payment option, you need to enable it through your PayPal gateway account. Once that's done, Venmo will appear as a payment option when PayPal is set up within the Encompass digital wallet integration.

Pay with PayPal is a new merchant option for all commerce forms.

75% of consumers want to pay faster! We are thrilled to announce our newest eCommerce partner, PayPal. Aiming to arm clients with more modern ways of payments for their constituents, PayPal offers One-Touch (aka One-Click Gifts) and recurring/perpetual transactions to be facilitated. In addition, Venmo will also be supported as a payment method through the PayPal flow for one-time gifts. PayPal can be configured as a **primary or secondary gateway** on your commerce forms. Set as a secondary gateway means you can continue to use your primary gateway in conjunction with offering PayPal and your constituents can choose their preferred payment method when making a gift.

Note: There is an issue with Venmo displaying on IOS devices. It appears that there may be a compatibility issue between Venmo and IOS devices, causing the Venmo payment method to not display properly. Encompass recommends using an alternative payment method when using IOS devices.



How do you get started?

You must have a merchant account your organization has already established at:

<https://www.paypal.com/us/webapps/mpp/express-checkout>

Do we also need to have a Venmo account in order to support Venmo payments?

Your organization will **not** need a Venmo account in order to accept payment as a wallet option with Venmo through PayPal. More about this can be found here:

<https://www.paypal.com/us/smarthelp/article/venmo-payments-faq3445>

How do I get access to have PayPal enabled on my site?

This is now enabled for all sites.

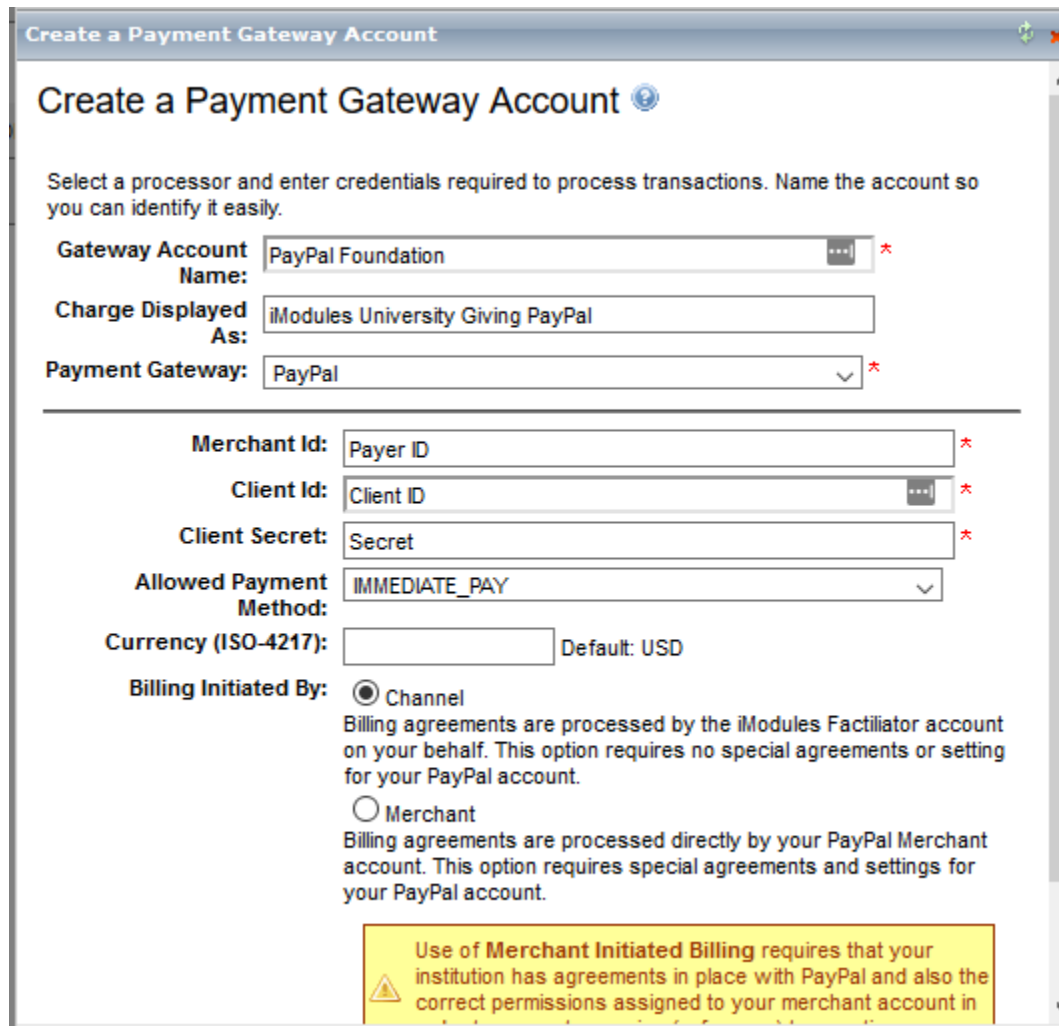
NOTE: if you are using Google Tag Manager, please be sure that the "wait for tags" setting on a form submission listener is disabled so PayPal can function.

Where can I set up my PayPal account?

Once enabled for your site, the PayPal gateway account can be set up and accessed via in the Accounts tab of

the Manage Payment Gateway's page in Encompass.

PayPal will provide Payer ID, Client ID and Secret which will be used in the setup in Manage Payment Gateways -> Accounts.



Create a Payment Gateway Account

Select a processor and enter credentials required to process transactions. Name the account so you can identify it easily.

Gateway Account Name: PayPal Foundation *

Charge Displayed As: iModules University Giving PayPal

Payment Gateway: PayPal *

Merchant Id: Payer ID *

Client Id: Client ID *

Client Secret: Secret *

Allowed Payment Method: IMMEDIATE_PAY

Currency (ISO-4217): Default: USD

Billing Initiated By: Channel
Billing agreements are processed by the iModules Facilitator account on your behalf. This option requires no special agreements or setting for your PayPal account.

Merchant
Billing agreements are processed directly by your PayPal Merchant account. This option requires special agreements and settings for your PayPal account.

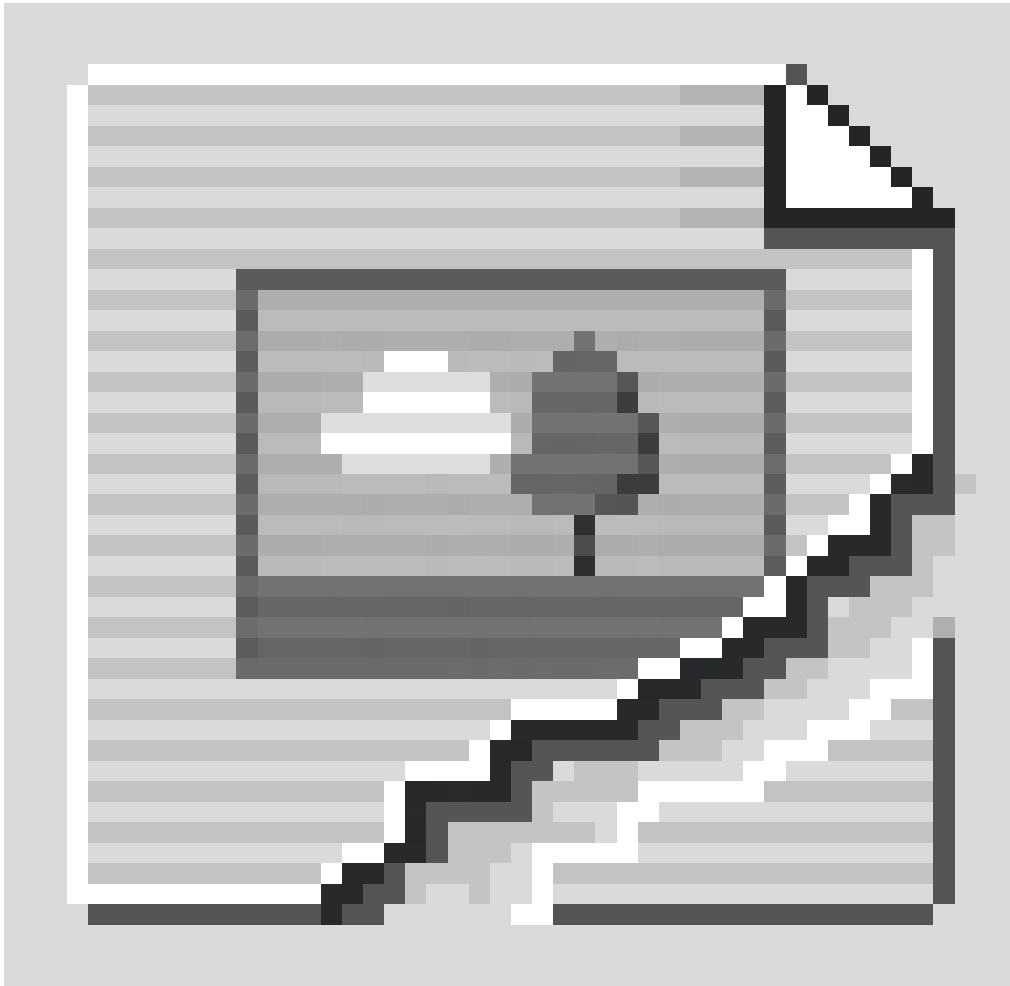
Use of Merchant Initiated Billing requires that your institution has agreements in place with PayPal and also the correct permissions assigned to your merchant account in

- Billing initiated by
 - Channel - When a donor has scheduled payments set up in Encompass, they will see iModules listed on their billing agreement in PayPal.
 - Merchant - When a donor has scheduled payments set up in Encompass, they will see their institutions' name listed on their billing agreement within PayPal - instead of iModules.

Where do I get the required config for setting up my merchant account?

- PayPal Merchant ID (Merchant ID)
 - Log in to your Merchant Account at <https://www.paypal.com>
 - Click on the cog wheel Profile and settings Look for Merchant account ID under the About the business section
- PayPal Client ID (User) & PayPal Client Secret (Password)
 - Go to <https://developer.paypal.com/>, click on the upper right icon with your name and access Dashboard My Apps & Credentials scroll down to REST API apps and click Create App
 - When creating the app, you can name it whatever you'd like. If the Sandbox account is not prepopulated then back out and go back into Create App. Sometimes it can take a while to update.

- Once you've created the app you will see the Client and the Secret. These are the values you use in the merchant config (along with the merchant account id from above).
- Make sure to change the option in the top right from Sandbox to Live before downloading your credentials.



What does Merchant initiated billing mean?

Merchant initiated billing means that the institutions' name will show in PayPal's constituent view related to recurring payments.

What is required to set up Merchant initiated billing?

You must have a merchant account established with PayPal. You must also go through a PayPal vetting process to be an approved PayPal merchant. You must reach out to iModules Customer Support so we can do our part to set up Merchant initiated billing.

Do I need to change to Merchant initiated billing?

No, you can continue to use the existing Channel initiated billing.

Note: Institutions will continue to receive the funds directly from the constituent/donor on either integration.

Which Admins will have access to set up the merchant account?

What are some optional configuration options?

Currency is defaulted to USD but can be configured to another currency but entering a valid ISO-4217 code in the area provided. You will need to set the currency in your merchant account before it will accept transactions.

NOTE - currency must also be enabled in the PayPal account.

- Log in to your Merchant Account at <https://paypal.com>
- Click on the cog wheel My Money Look for Currency Management Click Add a currency.

Will PayPal work on Events with Donations?

At this time, PayPal will not work on Events with Donations.

What kind of PayPal account is supported?

PayPal offer two kinds of accounts: Personal and Business.

- **Personal accounts** are ideal if you shop online or if you want to send and receive money from friends and family.
- **Business accounts** have all the features of Personal accounts plus additional services for online merchants

NOTE - This is not a replacement for the PayPal Payflow Pro payment gateway we currently support and would be a separate integration.

How will this work when PayPal is configured to be my secondary gateway?

PayPal as Secondary - The last step of the form will have a "Pay with Card" button AND a PayPal branded button.

- Pay with Card - Proceeds to either billing step or Hosted Processor site
- Checkout with PayPal - Proceeds to PayPal website



For Events, the option will be shown on the Billing step.

Registrant

Guests

Activities

Billing

Review

Finish

TRANSACTION SUMMARY

Amount \$50.00

[Click to expand transaction details](#)

PAYMENT METHODS

Check out with 

Or Pay With Card

BILLING INFORMATION

Full Name:

Jeanette Maack *

(Full name as it appears on card)

Billing Email:

jmaack@imodules.com *

Billing Phone:

913-555-5555 *

Can this be used to replace PayPal buttons we have on content pages on our site?

No, this is not supported at this time.

Will PayPal support scheduled and perpetual gifts?

This uses a slightly different API (reference transactions) that allows iModules to bill the constituent's PayPal account on a recurring basis after the initial transaction.

The billing agreement is outlined for constituent to review before approving the transaction.

Billing Agreement token format:

- ScheduledPayment = "[Today's Payment] now and [Recurring Amount] [Recurring Frequency] for [Count of Remaining Payments] payments totaling [Total Donation]"
- Perpetual = "[Today's Payment] now and [Recurring Amount] [Recurring Frequency]"
- Optional Suffix will be appended to the end of the above text strings if a commerce item was selected in the form = "(plus [Total of Commerce Items] now)"

NOTE: If you are testing using your sandbox environment, you will need to append testurl=1. If you use this (&testurl=1) to make a scheduled payment and then create a scheduled payment to process through your sandbox account, it will fail. The offline app that processes recurring payments *only* goes through the live account.

Where can I update the default email body for PayPal messages?

Updating on form by form basis will still be supported.

If you would like to change what has been defaulted, Support can update global verbiage tokens:

[RecurringBillingFailedChargeNotificationPayPal_EmailBody] will update PayPal failure message for all forms in all GIDs

[RecurringBillingUpcomingChargeReminderPayPal_EmailBody] will update PayPal upcoming charge reminder message for all forms in all GIDs

Where can I set up recurring billing emails?

You can find the Upcoming Charge Reminder and the PayPal Failure messages under the [Recurring Billing Emails](#).

How will we know which transactions in the reconciliation file were done via PayPal versus our Primary Gateway?

Authorization Code found in reporting will start with PAY. For reconciling transactions, you will use PayPal



Transaction ID AND Customer Trans Number.

NOTE - With PayPal enabled for your site, a new column (Merchant Account Name) is added to the left of Authorization Code. This will happen for the Giving Transaction Export and the Event Reconciliation with Adjustments Export.

Will billing information pass back from PayPal?

In order for billing address information to automatically write to reporting, you will need to reach out to iModules Customer Support to have this enabled. Please provide the email address associated with the PayPal account when contacting us.

Once we have done our part, billing address information will automatically write to the report.

How can constituents set up "Pay with Venmo" to work with PayPal?

Please keep in mind that in order to see the option to pay with Venmo, you will need to have Venmo currently installed on your phone, be checking out with an eligible PayPal merchant, and not have configured PayPal OneTouch.

To opt in and purchase with Venmo, tap on the icon in the upper left corner of the app, then tap on Settings. In Settings, there's the Buying section. To use Venmo to pay during checkout, tap Enable Mobile Web Purchase' or Connect Browsers.



KB Product

Encompass

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Title

PayPal
