

# Payment - user guide

by iRaiser



<b>1. Introduction</b>	<b>4</b>
<b>2. Back-end</b>	<b>5</b>
<b>3. Access creation and modification</b>	<b>7</b>
<b>4. Set up</b>	<b>11</b>
4.1. Shortcodes	13
4.2. Default content	15
4.2.1. Default contents of the form (steps 1-2-3)	17
4.2.2. Default thank you pages	21
4.2.3. Default emails	25
4.2.4. Appendix	31
<b>5. Default settings</b>	<b>31</b>
5.1. Default settings - common	32
5.2. Fiscal reduction settings	33
5.3. ODT set up for PDF generation	35
5.4. The Smart Grid	38
5.5. Tracking	39
5.6. Titles	40
5.7. Payment's technical information	40
5.8. Design - Expert	42
<b>6. Form/campaigns settings</b>	<b>42</b>
6.1. First form/campaign creation and settings	47
<b>7. Gifts and contacts management</b>	<b>56</b>
7.1. Payments	56
7.1.1. Advanced search	58
7.1.2. Payment details	59
7.1.3. Online payments	64
7.1.3.1. One-off payments	64
7.1.3.1.1. Validated one-off online payments	65
7.1.3.1.2. Failed online one-off payments	67
7.1.3.1.3. Canceled online one-off payments	70
7.1.3.1.4. Suspicious one-off online payments	72
7.1.3.1.5. Pending online one-off payments	73
7.1.3.2. Regular donations	74
7.1.3.2.1. Regular commitments	75
7.1.3.2.2. Regular online Payments	77
7.1.4. Authorizations	79
7.1.4.1. One-off payment authorizations	80
7.1.4.1.1. One-off payment authorization statuses	81
7.1.4.2. Regular commitment authorizations	82

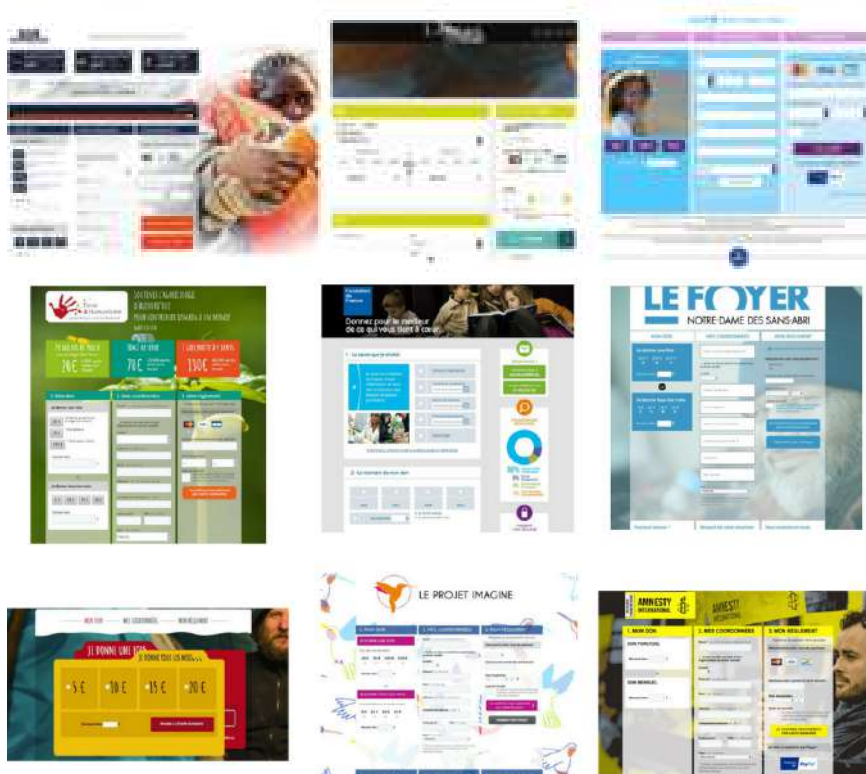


- 7.1.4.2.1. Regular commitment authorization statuses ..... 83
- 7.1.5. Pledges ..... 83
  - 7.1.5.1. One-off payment pledges ..... 84
    - 7.1.5.1.1. One-off payment pledges statuses ..... 86
  - 7.1.5.2. Regular commitment pledges ..... 86
    - 7.1.5.2.1. Regular payment pledges statuses ..... 88
- 8. "Contacts" section ..... 88**
  - 8.1. Contacts ..... 89
  - 8.2. Blacklist ..... 91
    - 8.2.1. How the blacklist works ..... 91
    - 8.2.2. Blacklist deactivation ..... 92
  - 8.3. Personal space ..... 93
    - 8.3.1. Log in to the personal space ..... 94
    - 8.3.2. Personal space set up ..... 94
    - 8.3.3. Personal space contact informations ..... 95
    - 8.3.4. How to use the personal space ..... 96
    - 8.3.5. Donor's details ..... 97
    - 8.3.6. Donor's payment history ..... 98
    - 8.3.7. Regular donor's options ..... 99
    - 8.3.8. Receipts download ..... 99
- 9. Data export and synchronisation ..... 101**



## 1. Introduction

**Payment** is [iRaiser](#)'s online payment platform, it is dedicated to Nonprofits. With **Payment**, you will be able to create, limitlessly, payment forms and raise funds online.



**Payment** works on every up-to-date browser and doesn't need any technical integration operation on your side: you will simply use your payment forms' direct URL to broadcast them and raise funds.

From **Payment**'s back office, you will be able to monitor your fundraisings, send out automatic emails, payment receipts or fiscal receipts, and of course export all of your data, or synchronize them with compatible third services ( database, CRM etc.)

The whole debit/credit part of the payments you'll get via **Payment** is processed by **online payment terminal gateways**. They are third party online services in charge of reaching out bank accounts and debit and credit them. **Payment** sends them all the data from its validated forms, and they proceed the payments. **Payment** is always connected to at least one payment gateway when going live. There are many compatible payment gateways, here are some of them:

- [Ingenico Payment Services](#), online and mobile payment world leader

Ingenico manages debit and credit operations on payment cards and is integrated on most of our payment platforms.

- [GoCardless](#), online direct debit service

With Gocardless, your can have your donors making online – one-off or recurring – direct debits at affordable costs.

- [Paypal](#), online payment service



Paypal makes it possible for your donors to pay without transmitting directly to you their credit cards or IBAN.

- [Slimpay](#), online direct payment service

Slimpay provides direct debit online services with its own e-signature technology.

**Payment** also works with [Gestpay](#), [Buckaroo](#), [Paylib](#)...

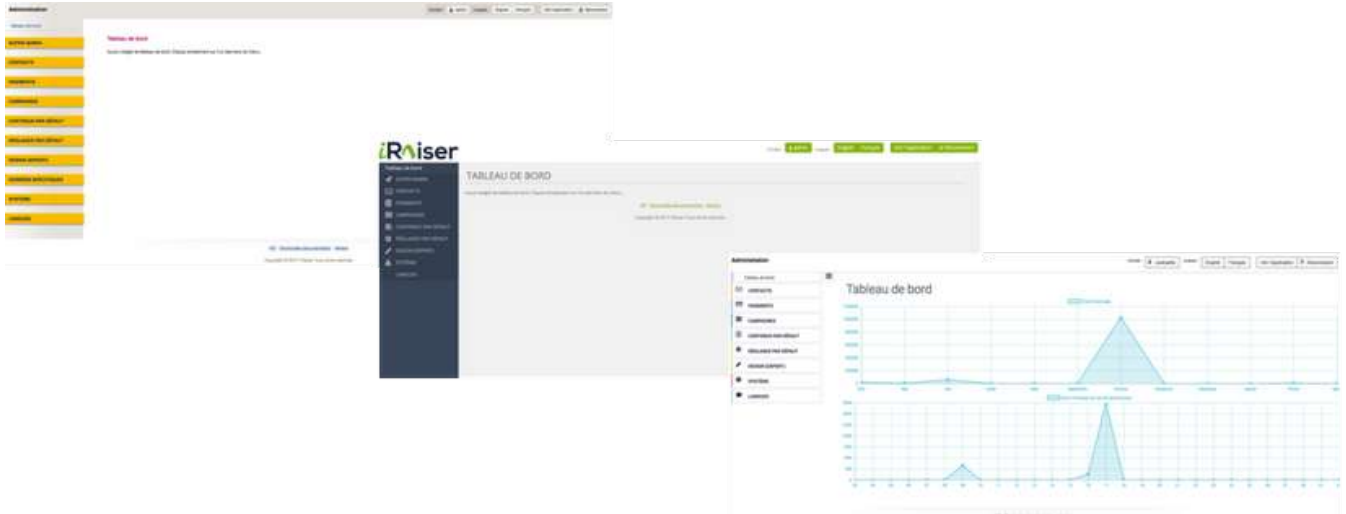
*Each of these payment terminals will charge you payment fees, or commissions (Paypal), [contact our marketing team for more information on billing](#).*

Some of these payment terminal gateways will be requested for payment invisibly: the donor won't notice anything. Others will take the donor from the form to their own interface to validate the payment. Some of the payment gateway listed will be used more commonly in certain countries than others. Our marketing team will help you choose the service that fits the most your fundraising goals, budget, and organization.

Remember that no money will be sent through payment and that the fund flows will directly go from the donor's bank account to yours (**Premium** offer) or to the collective **Starter** subscribers' bank account before being sent to your bank within 30 days end of the month.

## 2. Back-end

**Payment's back-end is available in 3 different themes:**



*Payment's 3 themes have the same features, except for the dashboard's graphs that are only available on the last theme.*

In order to log in to your back-end, go to <https://mydonationplatform.eu/manager.php/jauth/login/form> (replace mydonationplatform.eu by your platform's real URL).

Enter your login and your password to access this page:



It is the interface you will use to manage your whole platform.

In order to navigate through **Payment**'s pages, you will have to use the accordion menus from the left column. Click on one of its titles so as to get access to its rubrics. These menus will let you, among other things:

- have a look at all of your donor's information or modify them
- monitor all the payments made using the payment platform
- set up and customize your forms and their emails
- export your data and set notification alerts
- set up the PDF the payment platform will send to your donors

## Options from the header



- **Account:** this button shows which account you used to log in. If you click on it, you can modify your user's information. Be sure not to share your login and passwords with anyone, since most of the things you will do from the back end will be linked to your personal ID.
- **Languages:** change the language of your interface by clicking on those buttons (does not change your payment forms' language).



- View application: this button is a short path leading to the by default campaign of your platform, i.e. the by default payment form of your platform.
- Disconnect: click here in order to log out.

## API and Shortcodes documentation links

[API - Shortcodes documentation - Version](#)

- API: click here to access technical documentations on how to use Payment's API and set up counters:
  - Counter API: set a counter showing the amount collected
  - Donation API: set a counter showing number of gifts you got
- Shortcodes documentation: click here to access **Payment**'s complete shortcode list.

## 3. Access creation and modification

As soon as you get **Payment**, an access is created for you. You will have to create your team members' access. **Payment**'s access management relies in the hands of its administrators. In order to create a new access, go to the « System » section of the lateral menu.



*If you can't display this section of the menu, or other settings options, when you are one of Payment's administrators, ask for an upgrade of your profile on [support.raiser.eu](mailto:support@raiser.eu).*

In « Users » click on « Create a new user » so as to add a new user to your payment platform. You can also use this page to check every existing account/user.



# Users List

## Login

Judicaëlle	<a href="#">View</a>
reader	<a href="#">View</a>
Telemarketing1	<a href="#">View</a>

[Create a new user](#)

Choose an ID (you won't be able to change it), avoid using your email address. Choose a name that will let you be identified by your team members. Choose a password and confirm it before registering it. **Payment** will suggest secured passwords, we recommend using them and changing them regularly.

## Create a new user

Login*	<input type="text"/>
Name*	<input type="text"/>
Password	<input type="password"/>
Re-type the password	<input type="password"/>

Example of a password: v13iR2CmYQ

[Return to the list.](#)

In order to modify an access, go to « System » > « Users » and click on « view ». You will be able to modify the name, the password, or delete the access.

## Details of the user Telemarketing1

Login	Telemarketing1
Name	Mawani S.

[Edit](#)

[Change his password](#)

[Delete](#)

---

[Return to the list](#)





You can create user groups so as to have a better visibility of your users. Groups are simple tags that help you categorizing your users. You can create new groups or edit existing groups' names, and delete the ones you created.

## Groups of users for rights

[Change rights of groups](#)

### Groups of new users

admins  IT  team collecte  team compta  team relations donateurs

**Set default groups**

### Change the name

IT  New name:  **Rename**

### Create a group

Name:  **Save**

### Delete a group

IT  **Delete**

Click on « change rights of groups » to define by default users' rights. In order to modify a user's group, go to « Rights of users » in order to add it to another one.

If you want a user to be able to modify other's access, go to « Rights of the users »



### Rights

	Personal rights
Create a group	<input type="checkbox"/>
Delete a group	<input type="checkbox"/>
Modify groups and their rights	<input type="checkbox"/>
View groups and their rights	<input type="checkbox"/>
Modify user rights	<input type="checkbox"/>
View user rights	<input type="checkbox"/>
The user can change his password	<input type="checkbox"/>
The user can modify his informations	<input type="checkbox"/>
The user can view his informations	<input type="checkbox"/>
Change the password of a user	<input type="checkbox"/>
Create a new user	<input type="checkbox"/>
Delete a user	<input type="checkbox"/>
View list of users	<input type="checkbox"/>
Modify informations of a user	<input type="checkbox"/>
View informations about a user	<input type="checkbox"/>

Tick the box to activate the corresponding rights.

Click on + or – to change a user's group.



# Rights for Telemarketing1

## Rights

Personal rights	Personal rights on resources	Groups	admins	IT	team collecte	team compta	team relations donateurs
-----------------	------------------------------	--------	--------	----	---------------	-------------	--------------------------

### Create a reader access



If you wish to create a reader access, just create one by naming it « reader ». The reader access won't be able to modify any settings or campaigns or modify a payment.



## 4. Set up

Before creating your first campaign, i.e. your first payment form, you have to set up your platform. Default contents and defaults settings are the first steps toward your first campaign launch.



 <b>DEFAULT CONTENT</b>
Common
Form (steps 1, 2 et 3)
Thank you page
Emails
Appendix
 <b>DEFAULT SETTINGS</b>
Common
Notifications / exports
PDF templates
Fiscal deductions
Smart grid
Tracking
Title
Technical informations

On **Payment**, pictures and texts are called « contents », so whenever you have to create or modify pictures and/or text, you will have to go to one of its content section, be it the « default content » section from the lateral menu, or the « content » option of a campaign. Default contents will be used by every existing or new campaign/form, and the contents set directly on a campaign (using a « content » button of the campaign list) will only be used by the campaign that is being edited.



Settings can be edited from the » Default Settings » section and the « Set up » button of every campaign from the campaign list. « Default settings » from the lateral menu lets you set the global settings of all the campaigns. « Set up » lets you edit a single campaign's configuration, without modifying other's.



## 4.1. Shortcodes

Every donation information that is registered is linked to a shortcode. For instance, when a donor writes his lastname in the « lastname » field of the form and validates his gift, this information is registered and linked to the [donator\_lastname] shortcode. As a result, you can use shortcodes to display your donor's registered information in emails, on thank you pages and PDFs. As a result, if you write « Thank you, Mr. [donator\_lastname] » in an email's text editor, the donor will receive « Thank you, Mr. Wong ».

Those shortcodes will be useful in many ways: customizing emails, thank you pages, but also customizing your data exports, or even setting up alerts. Shortcodes will also come in handy for your .odt templates that will be used for generating **Payment's** PDFs (receipts, fiscal receipts and pledges). Those shortcodes will be slightly different though, as instead of being between [ ], they will be using { }:

[donator\_firstname] => {donator\_firstname}

You can find the shortcode lists :

- In every Payment details page, by clicking on the « Show shortcode values for this donation »

Show shortcode values for this donation

you will get the shortcode list of the donation;



Cacher

Tags (codes)	Valeurs pour le don TST1920170209-936-0493
[now]	2017-06-23 17:18:36
[donation_reference]	TST1920170209-936-0493
[donation_category]	payment
[donation_type]	once
Campaign	
[campaign_id]	4
[campaign_name]	Donations from closed campaigns
[campaign_type]	donation
[campaign_affectation_code]	GEN16
[campaign_closure_date]	
[campaign_description]	Default form Permanent form for closed campaign redirection.
[campaign_goal_amount]	0
[campaign_goal_quantity]	0
[campaign_is_closed]	0
[campaign_is_default]	0
[campaign_origin_code]	86780
[campaign_receipt_edition]	1
[campaign_received_code]	001
Context	
[context_affiliation]	
[context_doc_version]	0
[context_ip]	5.135.140.45
[context_lang]	fr_FR
[context_query_string]	
[context_referer]	https://test19.raiser.eu/manager.php/manager/campaigns/
[current_lang]	fr_FR
Donation	
[donation_affectation]	
[donation_amount]	56000
[donation_amount_to_word]	cinq cent soixante euros
[donation_amount_with_currency]	560 €
[donation_currency]	EUR
[donation_editiban_uri]	https://test19.raiser.eu/index.php?module=donations&action=editiban&key=v89d0ce7fa8ceab3c65785b11671150de88fe365b589c2a14d1e409.07684652&lang=fr_FR
[donation_external_id]	
[donation_frequency]	once
[donation_grid_mode]	nonfree
[donation_renew_url]	N/A
[donation_status]	validated
[donation_creation_date]	2017-02-09 09:36:36
[donation_status_date]	2017-02-09 09:36:38
[donation_status_origin]	
[donation_validate_key]	v89d0ce7fa8ceab3c65785b11671150de88fe365b589c2a14d1e409.07684652
[donation_validate_url]	https://test19.raiser.eu/index.php?module=donations&action=validate&key=v89d0ce7fa8ceab3c65785b11671150de88fe365b589c2a14d1e409.07684652&lang=fr_FR
[donation_validation_date]	2017-02-09 09:36:38
Donation setup (for regular payments)	
[donation_setup_id]	
[donation_setup_number]	
Donator	
[donator_address1]	19 Rue Mongenot
[donator_address2]	
[donator_city]	Saint-Mandé
[donator_civility]	M
[donator_civility_code]	MR
[donator_civility_long]	monsieur
[donator_company]	
[donator_country]	FRANCE
[donator_country_iso]	FR
[donator_dear]	cher
[donator_email]	araz@iraider.eu
[donator_external_id]	
[donator_firstname]	Jason
[donator_lastname]	Coste

- Under every text editor from any content that can use them:

▼ Thank you page (after form submission / payment validation)

Content

Source

Format - Tells - A -

[donator\_dear] [donator\_firstname] [donator\_lastname] thank you for your support!

You will soon receive your donor card and a private invitation for two people to join us for our Christmas event. Thanks to your [donation\_amount\_with\_currency] donation we will be able to continue our efforts.

body

Show shortcodes

This button displays the list of the shortcodes that can be used for the text that you are editing.

- In Payment's footer, from any page, by clicking on « Shortcode documentation »



## [API - Shortcodes documentation - Version](#)

You can get the full list of every shortcode working in **Payment**.


Shortcodes are organized by groups:

- « Organisation » gathers all the shortcode relating to your organization's information, as set in « Default settings » > Common
- « Campaign » gathers the shortcodes of the campaign
- « Context » gathers the shortcodes of the gift's context information, such as, for instance, which link was used by the donor to access the form.
- « Donation » gathers the shotcodes relating to the gift information (amount, frequency, payment method...)
- « Donator » gathers the shortcodes relating to the donor's personal
- « Fiscal receipt » gathers the shortcodes related to receipts information (creation date, reference...)
- « Payment » gathers the transaction information shortcode
- « Payment Provider/Gateway » gathers transaction informations sent back by the involved payment gateway
- « Payment Mode » gathers payment method information shortcodes
- « Qualification » gathers qualification question shortcodes used on the thank you page
- « Sympathizer » gathers the personal space information shortcodes
- « Reserved fields (custom) » gathers customized fields shortcodes that you created from the campaigns (Premium offer)

You will find at the end of each shortcode list variable guidelines and links to PHP documentation to help you go further in your use of shortcodes and create advanced settings. Thanks to that, you will be able to turn a shortcode's value into capital letters, dynamically change the content of an email if the donor ticked the company gift box. Shortcodes are heavily adaptable and polyvalent, be sure to have a look at these guides and at our shortcode help list.

## 4.2. default content

From the « Default contents » menu, you can define texts and pictures that will be used by all of your forms. Of course, you will be able to customize individually your campaigns. On each page from the default content section, you will use text editors.

 <b>DEFAULT CONTENT</b>
Common
Form (steps 1, 2 et 3)
Thank you page
Emails
Appendix



Above each page from the « Default content » section, flags are displayed. Each flag stands for a language that is active on the platform. Simply click on one of the flags to access the corresponding text editor and customize it.

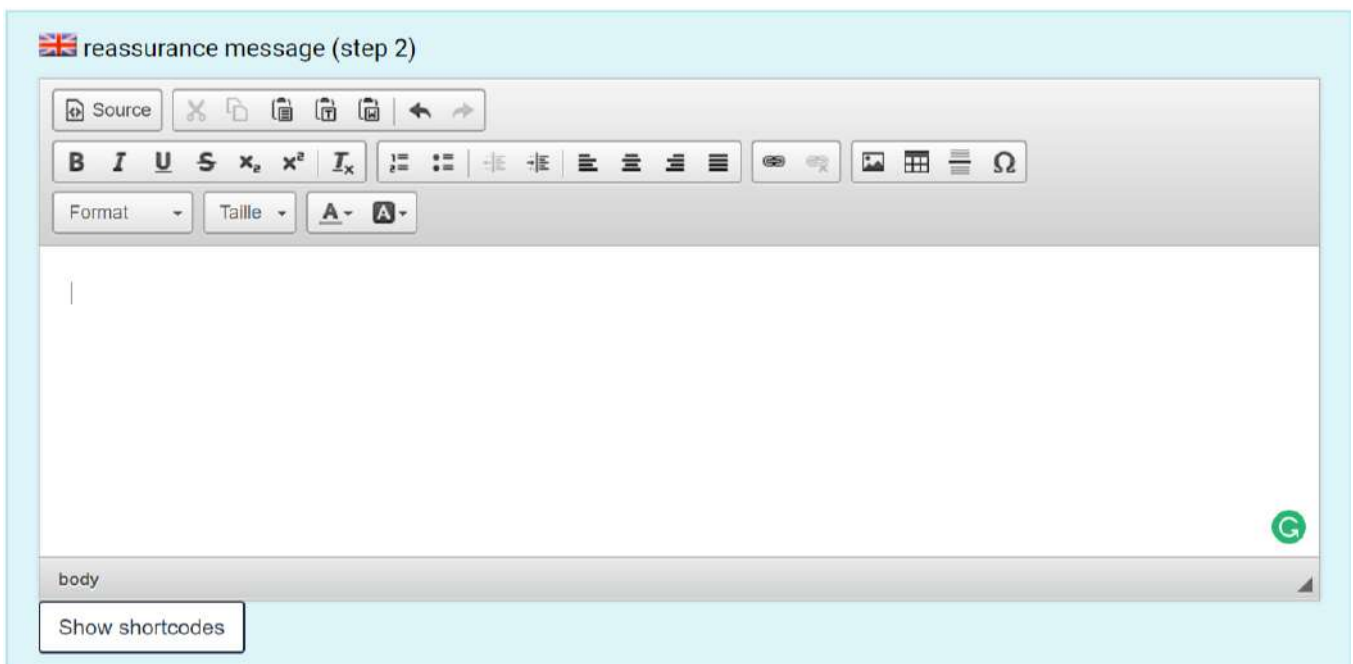


**Payment** can display forms in the following languages:

- French
- English
- Italian
- German
- Portuguese
- Dutch
- Flemish
- Japanese

If you need to add a new language, post a request on [support.iraiser.eu](http://support.iraiser.eu) (free). Please, take the time to prepare all the translations required (thank you pages, emails, .odt) in order to be able to integrate the content as soon as you get your language activation.

Content text editor



Every text editor has the same options and will let you use links, pictures and modify your text.

- the « source » button will let you integrate code. Be sure to click on it before writing code, and save by clicking on the saving button.
- « the show shortcode » button displays the complete list of the shortcodes that are available and that can be used. In order to integrate a tag, click on it. It will automatically appear in the text zone. If you need help to understand the use of a tag, have a look at its value in the right column.





## Common texts



Organization name	<input type="text" value="iRaiser.org"/>
Organization description	<input type="text" value="Organisation description"/>
Title of the form	<input type="text" value="Stronger together"/>
Meta description	<input type="text"/>
Meta keywords	<input type="text"/>
<input type="button" value="Save"/>	

The common texts section will let you create tags for your organization, that you will be able to use wherever you want on any of **Payment**'s page. enter the name of your organization, a description of your actions and choose a title for your form (the title will be displayed at the top of the browser).

Be sure to personalize the meta data and keywords so as to enhance your forms' SEO. PPayment is delivered with demonstration content, if you don't modify it, you will have the same meta data as many other platforms on the market...

### 4.2.1. Default contents of the form (steps 1-2-3)

The « Form (step1,2 and 3) section will let you modify and set up the pictures and texts that will be displayed in every form. Be sure to replace the demonstration content of your platform, so as to not have the same texts as other Payment users.

- Step 1 is the first page from the A version of the form, and the first column from its B version



MY DONATION

1 2 3 **4** Your donation is 100% secure

**I DONATE ONCE**      **I DONATE EVERY MONTH**

€ 10   € 30   € 50   OR   € 5   € 15   € 30

€ 100   € 200      € 50   € 100

Choose your own amount €

Choose your own amount €

**WHY DONATE ?**  
Your donation will help us continue our work!  
We would not have gone so far without you. Every Challenge we accomplished is your very own victory.  
If you have any questions about making a donation, call us on 0933184178493

The real cost of your donation is € 2.50 (tax exemption of € 7.50)

**GO TO NEXT STEP**

POWERED BY **Raiser**      Personal space   Credits   Legal Information   Contact

- Step 2 is the second page from the A version of the form, and the second column from its B version

MY COORDINATES

1 2 **3** 4 Your donation is 100% secure

Email \* e.g. jo.bloggs@email.com

I am making a donation on behalf of an organisation

Company e.g. Apple

Title \*      First Name \* e.g. Joanna      Last Name \* e.g. Bloggs  
Mr           

Address 1 \* e.g. 123 Streetsvan Road

Address 2 e.g. Greenwich

Postcode \*      City \* e.g. London  
     

Country \* e.g. United Kingdom

\* Required Fields (this information is mandatory to issue your tax receipt)

**GO TO NEXT STEP**

**WHY EACH DONATION MATTERS**

- 91% of our funding comes from our supporters.
- We rely on your donations and receive no government funding for our research.

POWERED BY **Raiser**      Personal space   Credits   Legal Information   Contact

- Step 3 is the third page of the A version of the form and the third column from its B version



- Reassurance messages are the texts that are on the right side of the different steps of the A version of the form and are at the bottom of its B version.

The B version of the form displays all the steps on one single page

As every page from the default content section, it is organized in accordions. Click on a title to display the corresponding content.



## Steps 1, 2 and 3



## ^ IMAGES

## STEP 1

Name of step 1

My donation

## ^ GIFTS GRID

## v REASSURANCE MESSAGE

In « Images », you can upload the picture from the « next step button » of the A version of the form. Be careful to use pictures of this size and weight: **256px \* 71px / 20ko (max)**

In « logo » upload your form's logo. Be careful to use pictures of this height and weight: **200 px (height) / 100ko (max)**

*You will also need to upload the logo that will be displayed on the personal space and the appendix (legal information/Credits/Contacts) in: Design (expert) > header > logotype. The logo hides an URL, the URL of your website. If you don't upload a logo, this URL will appear. Be sure to put a [transparent image](#) to replace the logo if you don't want to display the logo and want to hide the link.*

Upload your default form background picture in « body (background-image). You can also add some expert CSS settings. Be careful to use pictures of these dimensions: **2000 px \* 850px / 300 ko (max)**

In step 1, you can choose the title of the first column/page of your form: Name of step 1.

In gifts grid, you can choose the titles and the descriptions of the grids:

## I DONATE EVERY MONTH

support us throughout the year

€ 5

€ 15

€ 30

€ 50

€ 100

Choose your own amount €

10

In reassurance message, you can customize the text that will be displayed at the bottom of the first column of the B version of the form or at the right side of the first page of the A version.

## STEP 2

Name of step 2

My coordinates

## ^ REASSURANCE MESSAGE

## ^ EXAMPLES



In Step 2, you can choose the title of the second column/page of the form: « Name of the step 2 »

In reassurance message, you can customize the text that will be displayed at the bottom of the second column of the B version of the form or at the right side of the second page of the A version.

In examples, you can choose different examples that will be displayed in light grey to help the donor filling the form.

Email \* soraya@hotmail.com  
Belzam@iraiser.eu

In reassurance message, you can customize the text that will be displayed at the bottom of the third column of the B version of the form or at the right side of the third page of the A version.

STEP 3  
Name of step 3 My payment  
^ REASSURANCE MESSAGE  
^ PAYMENT BUTTONS

In « payment buttons », you can change the payment validation buttons. Buttons are pictures. You can replace them by creating your own pictures, with the color and the text you want.

Be careful to use pictures of these dimensions: **256px \* 71px / 20ko (max)**

Your buttons' alternative texts can be set up at the bottom of this page:

- Text for payment by credit card
- Text for online payment via external platform (Ingenico)
- Text for authorizations
- Text for one-off pledges
- Text for regular pledges

Click on save to register your settings.

## 4.2.2. Default thank you pages

DEFAULT CONTENT  
Common  
Form (steps 1, 2 et 3)  
Thank you page  
Emails  
Appendix



The « Thank you page » section lets you customize every single thank you page that will be displayed to your donors. You can set them differently according to the payment channel and/or frequency of your donation.

The thank you page is always divided into two blocks. On the left, will be displayed the message you set, and on the right, you will see additional questions to the donor – if you activated them (campaign list > set up of the campaign > qualification questions). Here is a thank you page:



The text in

bright color displayed at the top of the thank you page is pre-set automatic.

Set up the thank you pages corresponding to the payment channels and frequency you use on your forms. If you don't write any content on a thank you page that is active, the donor will see an empty thank you page displaying the automatic message:



There are two different types of thank you page for each payment channel:

- The thank you page after submission of the form will be necessarily displayed to every donor clicking on the payment validation button. This thank you page is mandatory.
- The thank you page after payment validation is optional and will only be displayed if you share its URL in the corresponding thank you email, using the shortcode [dontaion\_validate\_url]. This URL validates the pending corresponding donation (if applicable), sends a second thank you email and displays the thank you page after payment validation.

Click on the flag(s) to switch from a language to another, and click on thank you page's title to modify its content.

## Texts on the thank you pages



### ONLINE PAYMENT

#### ONE-OFF PAYMENTS

^ *Thank you page (after form submission / payment validation)*

^ *Thank you page (after payment validation)*

#### REGULAR COMMITMENTS

^ *Thank you page (after form submission / payment validation)*

^ *Thank you page (after payment validation)*

### One-off thank you page (after form submission/payment validation)

This thank you page is displayed to donors who made a one-off online payment (credit card, Paypal, Gocardless IBAN...), as soon as they hit the payment validation button. Online payments are automatically processed by online payment gateways, so when the donor actually see this page, his or her payment is already validated.

### Regular commitment thank you page (after form submission/payment validation)



This thank you page is displayed to donors who made an online regular commitment (credit card, Gocardless IBAN...), as soon as they hit the commitment validation button. Online commitments are automatically processed by online payment gateways, so when the donor actually see this page, his or her commitment is already validated and his or her payment information registered for the first regular payment debit (usually on the 5th of the month).

#### AUTHORIZATIONS

##### ONE-OFF PAYMENTS

- ^ *Thank you page (after form submission)*
- ^ *Thank you page (after authorization validation)*

##### REGULAR COMMITMENTS

- ^ *Thank you page (after form submission)*
- ^ *Thank you page (after authorization validation)*

#### One-off authorization thank you pages (after form submission)

This thank you page is displayed to donors who made direct debit authorization, by registering their IBAN (/BIC) – as soon as they hit the authorization button.

#### Regular commitment authorization thank you page (after form submission)

This thank you page is displayed to donors who made a regular debit authorization, by registering their IBAN (/BIC) – as soon as they hit the authorization button.

#### PLEDGES

##### ONE-OFF PLEDGES

- ^ *Thank you page (after form submission)*
- ^ *Thank you page (after pledge validation)*

##### REGULAR COMMITMENTS

- ^ *Thank you page (after form submission)*
- ^ *Thank you page (after pledge validation)*

#### One-off pledge thank you page (after form submission)

This thank you page is displayed to donors who made a pledge (cheque or bank transfer) as soon as they hit the pledge button.

#### regular commitment pledge thank you page (after form submission)

This thank you page is displayed to donors who made a pledge (cheque or bank transfer) as soon as they hit the pledge button.

Thank you pages after the validation of the payment are optional and will only be displayed if:

– you choose to put their URL in the corresponding thank you page using the [conation\_validate\_url] shortcode





and the donor clicks on it

– the donor made a donation using the Gocardless Iban service, and clicks on the confirmation link in the online regular commitment thank you email.

Activate only the optional thank you pages you need.

**One-off online payment thank you page (after payment validation)**

This thank you page is displayed to donors who made an online payment using the Gocardless Iban service, when they click on the confirmation link of the « Notification for SEPA mandate » email.

**Online regular commitment thank you page (after payment validation)**

This thank you page is displayed to donors who made a regular online commitment using the Gocardless IBAN service, as soon as they click on the confirmation link of the « Notification for SEPA mandate » email.

**One-off authorization thank you pages (after payment validation)**

This thank you page is displayed to donors who made a direct debit authorization by sending out their IBAN (/BIC) details, when they click on the URL generated by the [donation\_validate\_url] shortcode if you integrated it in the corresponding thank you email. When the donor clicks on this link, he or she validates his authorization (the authorization is then registered in the validate authorization section) and receives the « thank you email (after authorization validation) ».

**Regular commitment authorization thank you page (after payment validation)**

This thank you page is displayed to donors who made a regular direct debit authorization by sending out their IBAN (/BIC) details, when they click on the URL generated by the [donation\_validate\_url] shortcode if you integrated it in the corresponding thank you email. When the donor clicks on this link, he or she validates his authorization (the authorization is then registered in the validate authorization section) and receives the commitment « thank you email (after authorization validation) ».

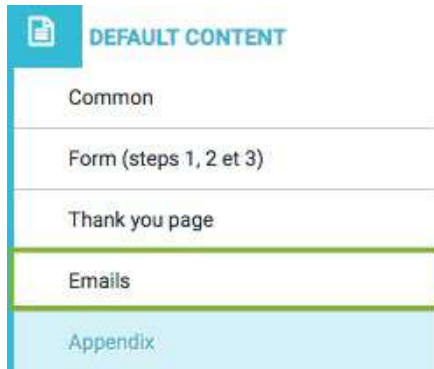
**One-off pledge thank you page (after payment validation)**

This thank you page is displayed to donors who made a pledge (cheque or bank transfer) when they click on the URL generated by the [donation\_validate\_url] shortcode if you integrated it in the corresponding thank you email. When the donor clicks on this link, he or she validates his pledge (the pledge is then registered in the validate pledge section) and receives the one-off « thank you email (after pledge validation) ».

**regular commitment pledge thank you page (after payment validation)**

This thank you page is displayed to donors who made a regular commitment pledge (direct debit or bank transfer) when they click on the URL generated by the [donation\_validate\_url] shortcode if you integrated it in the corresponding thank you email. When the donor clicks on this link, he or she validates his pledge (the pledge is then registered in the validate pledge section) and receives the « one-off thank you email (after pledge validation) ».

## 4.2.3. Default emails



The « Emails » section from the default content menu lets you set up all the emails that are automatically sent by Payment. These emails are sent when:

- when the donor has made a donation
- when the credit card that was registered for a regular commitment is about to expire
- when you validate a payment (authorization, pledge)
- when the donor forgets to send his payment after a pledge
- when his online regular payment failed
- when his receipt is available
- when he leaves a form, after giving his email address, without making a donation
- when his mandate is ready and waiting for validation

On this page, you will find the complete list of the emails that can be sent to your donor. You can't add any new email to this list, if you need to send additional emails, please use your compatible CRM. If you want to deactivate an email, simply empty its fields (all of them).

The « Emails » page is similar to most of the default content pages and uses accordions. Click on an email's title in order to access its [editor](#). Click on the « show shortcodes » button to display all the [shortcodes](#) available for the email you are editing, and click on the shortcode you want to integrate in order to instantly use it in your content. Each email has a test button, click on it if you want to send a test email to [Payment's administrator](#).



## ONLINE PAYMENT

### ONE-OFF PAYMENTS

▼ **Thank you email (after payment validation)**

Sender's e-mail address

Sender's name

Subject

Content

Source

Format Taille

[donator\_clearfirstupper] [donator\_firstnamefirstupper] [donator\_lastnamefirstupper] thank you for your [donation\_amount\_with\_currency] donation.  
 You will soon receive our brochure, please check the details you gave us:  
 [donator\_civility\_longfirstupper] [donator\_firstnamefirstupper] [donator\_lastnamefirstupper]  
 [donator\_address1] [donator\_address2]  
 [donator\_postcode] [donator\_city]  
 [donator\_country]

If anything is wrong, please contact us at [organisation\_phone].  
 Thanks again for your support.

Have some time ? We would be pleased to show you our latest [projects](#)

[\[organisation\\_representative\]](#)

body

Show shortcodes Test

Save

### General

This part is very important for the smooth functioning of Payment's emails. the sender's email address and name will be used for every email that does not have specific sender information and for your export notification emails and suspicious gift alerts. This sender information must be filled so as not to deactivate important emails.

## Emails sent via the form



### COMMON

Sender's e-mail address

Sender's name

Recipients in BCC (separated with ";")

"Recipients in BCC" is used on the following emails: follow-up email in case of drop out, thank you email for one off and regular gift, thank you email for pledge by cheque and by french direct debit, notification email "tax receipt ready" and first card renewal follow-up email (not working with 2nd and 3rd emails)

Save

You can send copy of the emails sent by Payment to your donors by putting one or several emails (separated by « ; ») in the recipient in BCC field. You will receive a copy of every automatic email, except the 2nd and last credit



card expiration email.

If you have several languages activated, click on the flags to go from one language to another.

The title of each email from this list will let you know when/on what condition it is sent.

<b>ONLINE PAYMENT</b>
<b>ONE-OFF PAYMENTS</b>
^ Thank you email (after payment validation)
<b>REGULAR COMMITMENTS</b>
^ Thank you email (after payment validation)
^ Follow-up e-mail card renewal: 1/3
^ Follow-up e-mail card renewal: 2/3
^ Follow-up e-mail card renewal: 3/3
<b>AUTHORIZATIONS</b>
<b>ONE-OFF PAYMENTS</b>
^ Thank you email (after form submission)
^ Thank you email (after authorization validation)
<b>REGULAR COMMITMENTS</b>
^ Thank you email (after form submission)
^ Thank you email (after authorization validation)
<b>PLEDGES</b>
<b>ONE-OFF PLEDGES</b>
^ Thank you email (after form submission)
^ Follow-up email waiting pledge
^ Thank you email (after pledge validation)

**Online payments > One-off payment > Thank you email (after payment validation)**

This email is sent when the donor's online payment is validated by the online payment gateway that processed it (Ingenico, Paypal, Gocardless...).

**Online payments > Regular commitments > Thank you email (after payment validation)**

This email is sent when the donor's online regular commitment is automatically validated by the online payment gateway that processed it (Ingenico, Paypal, Gocardless...).

**Online payments > Regular commitments > Follow-up emails card renewal 1/2/3**

These emails are sent when the regular donor's credit card is going to expire. The first email is sent 30 days before the expiration date, the second 5 days before and the latest one is sent the day the credit card expires. In each of these emails, there is a link to the donor's upgrade/renewal form: [donation\_renew\_url] or [link|text].

*[donation\_renew\_url] is the only shortcodes that permanently corresponds to the upgrade/renew form URL. [link|text] is a generic shortcode which value changes from one email to another.*

**Authorizations > One-off payments > thank you email (after form submission)**

This email is sent when the donor clicks on the one-off authorization confirmation button (IBAN/(BIC)).

**Authorizations > One-off payments > thank you email (after authorization validation)**

This email is sent when you validate the donor's authorization from the back end, or when the donor clicks on the validation URL from his authorization thank you email ([donation\_validate\_url]).

**Authorizations > Regular commitments > thank you email (after form submission)**



This email is sent when the donor clicks on the regular commitment authorization confirmation button (IBAN/(BIC)).

**Authorizations > Regular commitments > thank you email (after authorization validation)**

This email is sent when you validate the donor's authorization from the back end, or when the donor clicks on the validation URL from his authorization thank you email ([donation\_validate\_url]).

**Pledges > One-off pledges > thank you email (after form submission)**

This email is sent when the donor clicks on the pledge confirmation button.

**Pledges > One-off pledges > follow-up email waiting pledge**

This email is sent 21 days after the donor's pledge registration if you have not confirmed its reception from the back-end. If 21 days is a too short period for you, ask for a change on support.iraizer.eu. Please remember that the longer the follow-up awaits, the lower its chances to succeed will be. If you do not wish to validate the pledges from your back-end, please empty all the fields of this email so as to deactivate it and avoid sending it to a donor who already sent back his or her cheque or money transfer.

**Pledges > One off pledges > thank you email (after pledge validation)**

This email is sent when you validate a donor's pledge after receiving the donation, directly from the back-end, or, when the donor clicks on the pledge validation URL ([donation\_validate\_url]).

**Pledges > Regular pledges > thank you email (after form submission)**

This email is sent when the donor clicks on the regular commitment pledge confirmation button.

**Pledges > Regular pledges > follow-up email waiting pledge**

This email is sent 21 days after the donor's regular commitment pledge registration if you have not confirmed its reception from the back-end. If 21 days is a too short period for you, ask for a change on support.iraizer.eu. Please remember that the longer the follow-up awaits, the lower its chances to succeed will be. If you do not wish to validate the pledges from your back-end, please empty all the fields of this email so as to deactivate it and avoid sending it to a donor who already sent back his or her cheque or money transfer.

**Pledges > Regular pledges > thank you email (after pledge validation)**

This email is sent when you validate a donor's regular donation pledge from the back-end, or when the donor clicks on the regular commitment pledge validation URL ([donation\_validate\_url]).

**Failed regular payment > follow-up e-mail failed transaction 1/2/3**

These emails are sent when an online regular payment's debit fails. An email is sent for each failed transaction. After the third consecutive failure, the corresponding commitment is automatically suspended.

**Other > follow-up e-mail in case of drop out**

This email is sent to any donor who entered an email on the form but did not validate a gift. Please remember that when the validation of a gift fails, the error message is displayed at the top of the form. Payment won't send an email to inform the donor of the failure.

This follow-up email is sent about 15 minutes after the donor entered the email address on the form. His content must be written as an invitation for the donor to come back to the form he left and make a donation.



**If a donor opens several forms and registers an email address on each of them, he will get a follow-up email for each of these forms.**

In some rare cases\*\*, this email can be sent if a payment gateway did not validate the status of a pending gift, after 3 days. In this situation, the donor sees the thank you page as soon as he clicks on the payment confirmation button, but does not receive any thank you email. His gift is registered as still waiting to be processed, not as validated. Payment will then ask the payment gateway involved in the process for the status of the gift, every hours, for 3 days straight. If Payment does not get a response, the gift is considered as failed, and the follow-up email is sent to the donor.

The default waiting duration is set at 30 minutes but you can change that and choose another one by contacting the [support](#). It should not be too long so as to avoid increasing the failure rate of the follow-up email:

- 10 min
- 15 min
- 20 min
- 30 min (default)
- 45 min
- 1 heure
- 2h
- 3h
- 4h
- 5h
- 12h
- 1 day
- 2 days
- 3 days
- 4 days
- 1 week
- 1 month

*\*\*Especially with Paypal donations when the donor does not click on the « go back to the shop » after validating the payment and the gift is registered as pending and switches to failed 3 days later.*

**Other >notification email « receipt ready »**

This email is sent when a donor's receipt is available. The receipt is attached to the email, and there is a direct link to the donor's personal space in the email's content.

**Other >notification email for SEPA mandate**

This email is sent right after the donor's GOCARDLESS IBAN gift. Be sure to customize the table's content.

**URL shortcodes that can be used in emails:**

**[sympathizer\_personal\_space\_url]** : this shortcode displays the direct URL to the personal space.

**[donation\_renew\_url]** : this shortcode displays the direct URL to the donor's upgrade form.

**[donation\_editiban\_url]** : this shortcode displays the GOCARDLESS IBAN form where the donor can modify the registered information before validating the mandate.

**[donation\_validate\_url]** : this shortcode displays the URL to validate a pending pledge/authorization/GOCARDLESS IBAN.

Be sure to integrate shortcodes that are relevant to the payment method used by the donor.



## 4.2.4. Appendix

### Names and content of the appendix pages



^ CONTENT OF THE CREDITS PAGE

^ CONTENT OF THE LEGAL INFORMATION PAGE

^ CONTENT OF THE CONTACT PAGE

Save

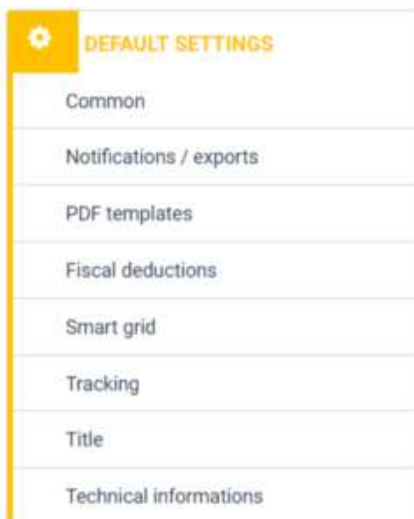
The « Appendix » section is also displayed like most content pages and uses accordions. Click on the title of the section you want to modify in order to display the [text editor](#).

Be sure to keep these pages up to date. This page can be displayed by clicking on the links that are in the footer of your forms:



## 5. Default settings

In the Default settings menu, you can set up Payment’s main configuration. these settings will be used by all of your forms/campaigns.



In this section you will set up:

- your organization’s [shortcodes](#), so as to be able to use them in your emails, appendixes, thank you pages, exports
- the minimum and maximum donation amounts of your form
- PDF sent by **Payment** (receipts, pledges)
- automatic fiscal deductions
- the Smart Grid



- tracking for analytics
- the titles displayed on your forms

You will also find the export and synchronization service, and **Payment**'s technical information.

## 5.1. Default settings - common

Default settings – common

### Common settings

COMMON SETTINGS	
Legal representative	Azalia Louvir
Organization address (line 1)	32 rue de paradis
Organization address (line 2)	Bureau 103
Organization postcode	75010
Organization city	Paris
Organization country	France
Organization phone	0184173493
Organization email	contact@paweb.eu
Organization website address	https://www.paweb.eu
Administrator email	contact@paweb.eu
Whitelisted emails (separated with semicolon ;)	contact@paweb.eu
MINIMUM AND MAXIMUM AUTHORISED AMOUNTS	
One off gift minimum amount	1
One off gift maximum amount	
Recurring gift minimum amount	5
Recurring gift maximum amount	

Save

Write down all the information required in the corresponding fields. Each field will let you use its shortcode in emails, thank you pages, reassurance messages etc. This way, if your organization moves to a new place or if the legal representative is replaced, you will just have to update these fields and it will update all the pages where you used the shortcodes.

**Organization website address:** the URL must have HTTP or a HTTPS, this is the URL that will be integrated behind the logo of the form and that will let your donors go back to your website.

**Administrator email:** this field is mandatory and very important. Please choose a collective email address or one that is always checked by someone and keep it updated. This address will receive: instant suspicious gift alerts, test emails, technical information.

**Whitelisted emails:** put your team members emails to prevent them from being blacklisted. You can add as many emails as you want, separated by « ; » without space. Be sure to check that the email you are adding here is not already blacklisted. If it is the case, delete it from the blacklist first.

### Minimum and maximum amounts

Define the minimum and maximum amounts you will accept for the gifts on your platform. Set the minimum accordingly to your processing fees. The maximum amount should be set wisely, and only if you have particular internal rules. Any donation equaling or exceeding this maximum value will be rejected.





### MINIMUM AND MAXIMUM AUTHORISED AMOUNTS

One off gift minimum amount	<input type="text" value="1"/>
One off gift maximum amount	<input type="text"/>
Recurring gift minimum amount	<input type="text" value="5"/>
Recurring gift maximum amount	<input type="text"/>

## 5.2. Fiscal reduction settings

*Bear in mind that tax reduction may not be used by your organization. Be sure to activate this only if needed*

On the fiscal deduction management page, you will be able to set any tax deduction in order to use them on your forms.



The tax deduction message, if activated from the campaign's setting, will be displayed at the bottom of each donation grid (one-off and regular) and will adapt to the amount chosen by the donor. In each form/campaign, you can choose from 4 different tax deductions:

- Tax deduction for individual
- French tax on wealth deduction
- Tax deduction for corporations
- Custom tax deduction each automatic deduction from this page works the same way.



For the three first deductions, pick the calculation method you want to use:

## Fiscal deductions management



### TAX DEDUCTION FOR INDIVIDUALS

Calculation method	Customized
Minimum amount for deduction triggering	0
Number of ceilings	1
Tax deduction rate 1 (in %)	75
Ceiling 1	531
Tax deduction rate 2 (in %)	66
Note to be displayed (about deduction)	up to 20% of the taxable income


You can pick from the two main French deductions for nonprofits, the Belgian deduction or customize your own deduction. the customized method. The customized method lets you pick your own minimum donation amount for deduction, the number of « ceilings » and the related tax deduction rates as well as the last part of the deduction sentence displayed in the payment grid.

#### – Custom tax deductions


If none of the previously mentioned deductions suits you, or if you wish to rewrite completely your deduction sentence from scratch, use the custom tax deductions (1,2) and set it as desired.



## CUSTOM TAX REDUCTION 1

Minimum amount for deduction triggering	<input type="text"/>
Number of ceilings	<input type="text" value="0"/>
Tax deduction rate (in %)	<input type="text"/>
 Note to be displayed (about deduction)	<input type="text"/>

## CUSTOM TAX REDUCTION 2

Minimum amount for deduction triggering	<input type="text"/>
Number of ceilings	<input type="text"/>
Tax deduction rate (in %)	<input type="text"/>
 Note to be displayed (about deduction)	<input type="text"/>

These custom tax deductions, once set, will let you use new shortcodes that will help you build your new reduction explication sentence in « Contents » from the campaign > Step 1 > Tax deduction sentence:

- [amount custom1]: will display the final cost of the gift once the custom deduction 1 is applied
- [deduction custom1]: will display the amount of custom deduction 1
- [amount custom2]: will display the final cost of the gift once the custom deduction 2 is applied
- [deduction custom2]: will display the amount of custom deduction 2

Example: Your donation will only cost you [amount custom1] after the application of the common tax deduction [deduction custom1].

In order to activate or deactivate the tax deduction sentence on a form/campaign, go to the campaign's set up page and click on « Enable fiscal deduction?\* Yes/No » and:

- Enable gift on behalf of an organization\* or
- Associated with French tax on wealth?\* or
- Enable « Gift Aid » (UK only) or
- Go to the campaign's contents page to customize your deduction

### 5.3. ODT set up for PDF generation



Payment generates PDF for pledges and receipts. From this PDF templates page, you are going to upload every single PDF templates of your platform, using .odt format and assign them roles.

In addition to their being completely customizable, these .odt will also be able to display your donor's information.

We highly recommend using free open source solutions such as [www.openoffice.org](http://www.openoffice.org) or <https://fr.libreoffice.org/> for creating and editing .odt. They will process UTF8 in a more reliable way than Microsoft Office. We also recommend using black and white A4 templates.

.odt will be used to generate PDF such as:

- one-off pledges (cheque, direct debit order)
- regular gift pledges (direct debit authorization, regular direct debit order)
- receipt for one-off payment/ one-off fiscal receipt
- receipts for regular payments / regular fiscal receipt

Once your template is created, click on « add a template » and save it. Be sure to choose a name that will make it easily recognizable from the .odt list.

Once it is registered, you can download it, modify it (be sure to change the file's name) or delete it.

When the template is registered, you can go down to the page and choose its role, using the drop down list in front of each option :



## DIRECT DEBIT AND CHEQUE PLEDGES

Cheque pledge file	<input type="text"/>
Direct Debit pledge file	<input type="text"/>
<input type="button" value="Save"/>	

## INVOICES, FISCAL RECEIPTS

Receipt (fiscal, invoice) for one off payment	<input type="text"/>	<input type="button" value="Test"/>
Receipt (fiscal, invoice) for regular payment	<input type="text"/>	<input type="button" value="Test"/>
Duplicate receipt (fiscal, invoice) for one off payment	<input type="text"/>	<input type="button" value="Test"/>
Duplicate receipt (fiscal, invoice) for one regular payment	<input type="text"/>	<input type="button" value="Test"/>
<input type="button" value="Save"/>		

In « Pledge » you will choose which .odt will be used as templates for pledge PDF. Feel free to make tests from your forms and cancel your pledges right after.

In « Invoices » select the .odt that will be used as a template for receipts. Click on « test » before saving, so as to be sure everything is ok. Don't save the template if something is wrong with it. You have two different types of receipts : receipts and duplicata.

- The .odt selected in « receipt » will be sent attached to the receipt notification email, and displayed in the personal space for download. You must chose this option if **Payment** is the only service you use for sending your receipts.
- The .odt selected in « duplicata » will be used to display a copy from the original receipt (sent by another service) in the donor's personal space. If you use this option, a synchronization between your other service and Payment is required.

## Useful .odt shortcodes:

- {donation\_year} : will display the year of the payment/gift, on the yearly fiscal receipt for instance.
- {donation\_date} : will display the date of the one-off payment/gift
- {amount} : will display the amount of the one-off payment/gift or the total amount of the monthly gifts/payments.

## if / then / else / switch and replace on .odt

You can use the same formula you use in thank you pages, emails and export. Be sure to replace [ ] by { }:

{tag|switch:original value=replacing value}

{{if} [then][else] [/if]}



{donator\_civility\_code|replace:value 1 of the tag=substitute 1|replace:value 2 of the tag=substitute 2]

#### .odt templates

If you are not comfortable with .odt creation, you can use our templates and customize them.

- [modèle de reçu fiscal](#)
- [modèle de promesse \(prélèvement automatique\)](#)
- [modèle de promesse \(chèque\)](#)

## 5.4. The Smart Grid

*The Smart Grid is a customized algorithm available on Payment's Premium version. The Smart Grid is dynamic and its amounts will change according to the donor's profile.*

### Smart grid configuration

Collect statistical data about visitors  Yes  No

Insert the following code (on each page of the website) at the end of the body

```
<script type="text/javascript" src="https://grids.raiser.eu/analytics.js"></script>
<script type="text/javascript">
  try{ new iRaiser_analytics({auth_key:"9072cb063574ab78ff090793c93c320"});}catch(e){} </script>
```

The Smart Grid has two different levels:

- Level 1 – this Smart Grid analyzes the donor's browser data and adapts its gift amounts according to the device and configuration used (browser, OS, brand and model of the device, screen size, resolution etc.).
- Level 2 – in addition to level 1's data, this Smart Grid also uses the donor's browser history and habits on your website (amounts of previous gifts, time spent on your website...)

If you want to activate the level 2 grid, go to « Default settings » > Smart Grid and activate the data collection. Then paste the code on every page of your website.

Contact us, on [support.raiser.eu](https://support.raiser.eu) so that we launch the data collection and analysis. The more visitors you have on the website, the less time it will take to complete the calibration process. The level 2 Smart Grid will be available when enough data is collected. Its activation will also depend on iRaiser's development schedule.

If you want to activate the level 1 Smart Grid, go to a campaign's gift grid and click on « Activate the Smart Grid ».

- *What happens if I activate the Smart Grid without pasting the codes on my website?*

Only the level 1 Smart Grid will be activated.





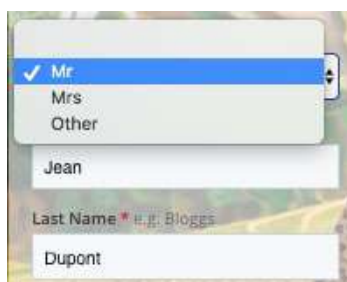
You can also integrate tracking codes on specific campaigns by clicking on their « set up » button. Scroll down the page and you will see the exact same JS analytics tracker fields. Any code pasted here will be added to the ones you put in the default settings.

## 5.6. Titles

On the « Titles » page, you can activate or deactivate the titles you want to display in the second step, for each language of the form.

ENGLISH >	
Mr	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Mrs	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Miss	<input type="checkbox"/> Yes <input type="checkbox"/> No
Ms	<input type="checkbox"/> Yes <input type="checkbox"/> No
Mr & Mrs	<input type="checkbox"/> Yes <input type="checkbox"/> No
Lord	<input type="checkbox"/> Yes <input type="checkbox"/> No
Lady	<input type="checkbox"/> Yes <input type="checkbox"/> No
Sr	<input type="checkbox"/> Yes <input type="checkbox"/> No
Fr	<input type="checkbox"/> Yes <input type="checkbox"/> No
Br	<input type="checkbox"/> Yes <input type="checkbox"/> No
Dr	<input type="checkbox"/> Yes <input type="checkbox"/> No
Drs	<input type="checkbox"/> Yes <input type="checkbox"/> No
Prof	<input type="checkbox"/> Yes <input type="checkbox"/> No
Rev	<input type="checkbox"/> Yes <input type="checkbox"/> No
Sr	<input type="checkbox"/> Yes <input type="checkbox"/> No
Srs	<input type="checkbox"/> Yes <input type="checkbox"/> No
Canon	<input type="checkbox"/> Yes <input type="checkbox"/> No
Other	<input type="checkbox"/> Yes <input type="checkbox"/> No
Family	<input type="checkbox"/> Yes <input type="checkbox"/> No
Mr & Mr	<input type="checkbox"/> Yes <input type="checkbox"/> No
Mrs & Mrs	<input type="checkbox"/> Yes <input type="checkbox"/> No

They will be activated on every form you've created or will create.



## 5.7. Payment's technical information

« Technical information », displays information about the different online payment gateways that are connected to Payment, and patterns set for your RUM, Ingenico aliases.





## Technical informations

SEPA mandate reference pattern	
RUM pattern example:	INFO:WEB (date:Y) (country:RUM) (date:Y) (date:Y) (date:Y)
Alias pattern (Ingenico)	
	(donator_firstname) (donator_lastname) (donator_lastname) (donator_lastname)
Alias example:	clerk@1702/21/150000

---

Ingenico - test	
Account type:	test
Account ID:	
3D secure:	no

---

Ingenico - default	
Account type:	production
Account ID:	
3D secure:	no

- SEPA mandate reference pattern

If you are using authorizations for direct debit payment, or GOcardless Iban, you will have to set your own RUM (SEPA mandate reference). Contact us on the [support](#) to set it as you wish. Once set, the reference will be written here.

- Alias pattern (Ingenico)

If you are using regular online payment via Ingenico, Ingenico will proceed to register an alias for each commitment. An alias is a credit card's print, it is used for debiting your donor's credit card every month. Payment displays here the pattern of these aliases. that will be billed to you, along with the fees for each credit card interrogation

*Aliases are billed to you, along with the fees for each credit card interrogation by Ingenico.*

- Ingenico test / default etc.

Every Ingenico account that is linked to your platform is registered here. Each Ingenico account is linked to one single bank account. If you need to add a new Ingenico account, contact us on [support.iraizer.eu](#).

- Paypal / Buckaroo / Slimpay / Gocardles etc.

Payment displays the list of the different online payment gateway connected to your platforms. If you need to add a compatible online payment gateway to Payment, contacts us on [support.iraizer.eu](#).



PayPal	
Active	no
Account type	unavailable

Buckaroo	
Active	no
Account type	unavailable

Slimpay	
Active	no
Account type	unavailable

Gocardless	
Active	no
Account type	unavailable

## 5.8. Design - Expert

This section is for developers and designers only. From the Design (Expert) section, you can modify both the way your forms work and look. If you integrate bad code or use it the wrong way, you can break down your platform.

Nevertheless, three modifications can still be made safely, by anyone:

- Logo Integration

The logo that will be displayed on other pages than the forms' (personal space, appendix...) General > Header > Background > Logotype.

- Background image

In General > Body > Background Image > body (background image)

In Thank you > Thank you page options > Block > Background image

- JS analytics trackers (integrated in the « header » section of the form)

In Expert mode.

Most of the trackers must be integrated this way:

```
[if][donation_status][in]validated,waiting,active[then] [else] your code [/if]
```

*Your code must be in https. If it is not, it will generate a security alert on your form.*

## 6. Campaigns

From the campaign menu, you can access the campaign list and every campaign you created, sorted by campaign types. Click on « campaign list to display all the campaigns. Click on a campaign type to see only the related campaigns.



Administration

Account: Judicaëlle Languages: English Français View application Disconnect

- Dashboard
- CONTACTS
- PAYMENTS
- CAMPAIGNS**
  - Campaigns list
  - Donation
  - Peer to peer
  - Subscription to Peer to peer
  - Purchase
  - Sponsorship
  - Subscription
  - Upgrade / Renew
- DEFAULT CONTENT
- DEFAULT SETTINGS

## List of thematic campaigns

+ Create a new thematic campaign

Legend

Open campaigns Closed campaigns

Campaign's name or id

Search Cancel

id Name - Description

25 Form opé Spiff 2017

★ @piEE017

Donation

Test

Spiff operation 2017-2018

Test link Coordinates QR grid Custom fields Duplicate

Test Export link View (N) Copy Link (N) View (R) Copy Link (R)

Each campaign will let you set up a form, that will be available in 2 versions: A and B

- A: 3-steps form



- B: 1-step form



MON DON	MES COORDONNÉES	MON RÈGLEMENT
<p><b>JE DONNE UNE FOIS</b></p> <p>chaque don compte,</p> <p>10 €</p> <p>Montant libre</p> <p>100 €</p> <p>ou</p> <p><b>JE DONNE TOUS LES MOIS</b></p> <p>Je soutiens durablement Go4Raiser.</p> <p>Montant libre</p> <p>€</p>	<p>Email * <a href="mailto:tony@thomast.com">tony@thomast.com</a></p> <p><a href="mailto:goma@iraiser.eu">goma@iraiser.eu</a></p> <p>Civilité *</p> <p>M</p> <p>Prénoms * <i>Suffame</i></p> <p>Gaspard</p> <p>Nom * <i>Blanty</i></p> <p>Omarl</p> <p>Téléphone portable *</p> <p>+ 06 12 34 56 78</p> <p>Adresse * 12, rue Péral</p> <p>8, place du Marché</p> <p>Complément adresse Bâtiment 2</p> <p>Code postal * 92200 Ville * <i>Suresnes</i></p> <p>Neuilly-sur-Sein</p> <p>Pays * ex. France</p> <p>FRANCE</p> <p><small>* Champs obligatoires (ces informations sont indispensables pour bénéficier de votre réduction fiscale)</small></p>	<p>Plateforme de paiement 100% sécurisée</p> <p>Sélectionnez votre carte de paiement</p> <p>MasterCard VISA</p> <p>Saisissez votre numéro de carte bancaire</p> <p>Date d'expiration</p> <p>Code de sécurité</p> <p><b>JE CONFIRME MON PAIEMENT PAR CARTE BANCAIRE</b></p> <p>ou faire un paiement par IBAN/BIC</p> <p>Votre numéro IBAN</p> <p><b>JE CONFIRME MON PAIEMENT PAR RIB/IBAN/BIC</b></p>
<p><b>POURQUOI DONNER ?</b></p> <p>Raiser.org est une association à but non lucratif (04 1901), ayant pour but :</p> <ul style="list-style-type: none"><li>• Visa : 4111111111111111</li><li>• Visa 3D : 4000000000000002</li><li>• American Express : 3741111111111111</li><li>• MasterCard : 5399999999999999</li><li>• Bancontact/Mister : 6703000000000003</li><li>• IBAN : FR14200410100500013M02606 - BIC : CMCIFR2A</li><li>• PayPal : <a href="mailto:webuser@iraiser.eu">webuser@iraiser.eu</a> / <a href="mailto:iraiser2013">iraiser2013</a></li><li>• IBAN : FR14200410100500013M02606 - BIC : CMCIFR2A</li><li>• BBAN UK (DD) : Bank code : 601613, Account number : 31926819</li></ul> <p><a href="mailto:contactasso@iraiser.eu">contactasso@iraiser.eu</a></p>	<p><b>RESPECT DE VOTRE VIE PRIVÉE</b></p> <p>Vos coordonnées sont indispensables pour vous envoyer votre reçu fiscal. Conformément à la loi informatique et libertés du 6 janvier 1978, vous disposez d'un droit d'accès, de modification, de rectification et de suppression des données vous concernant. Pour exercer ce droit, adressez-vous à :</p> <p><a href="http://iraiser.org">iraiser.org</a> 32 rue de paradis Bureau 103 75010 Paris - France Tél: 0184178493 Email: <a href="mailto:contactasso@iraiser.eu">contactasso@iraiser.eu</a></p>	<p><b>NOUS SOUTENIR EN TOUTE CONFIANCE</b></p> <p>Ce site internet est 100% sécurisé.</p> <p>Toutes les informations bancaires pour traiter le paiement sont cryptées grâce au protocole SSL. Elles ne sont en aucun cas conservées sur nos systèmes informatiques.</p> <p>Notre service donateurs est à votre disposition pour répondre à toutes vos questions. N'hésitez pas à nous contacter par e-mail : <a href="mailto:contactasso@iraiser.eu">contactasso@iraiser.eu</a></p>

You can choose which version you want to distribute to your donors or use both.

On the campaign list page you can:

- Create a new campaign/search for a campaign



# List of thematic campaigns

[+ Create a new thematic campaign](#) **Legend**

[Open campaigns](#) [Closed campaigns](#)

Campaign's name or id

[Search](#) [Cancel](#)

Click on the « create a new thematic campaign » from the campaign list page.

If you are looking for a campaign that was already created, use the search field.

- Modifying a campaign you created by using the setup buttons displayed on each campaign:

### – Set up

Click on set up to set the parameters of your campaign

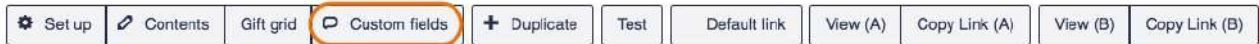
### – Contents

Click on this button to access and modify the pictures and texts of the campaign

### – Gift grid

Click on this button to choose the amounts displayed on the payment form

### – Custom fields



- Duplicate a campaign



Click on this button to get a perfect clone of your campaign (settings, custom contents, codes from the expert mode included)

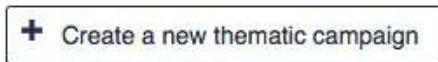
- Close a campaign \*



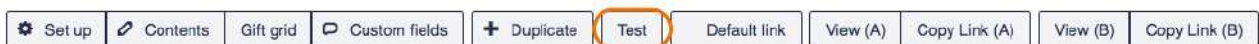
*\*Once a campaign is closed, its payment form is offline, and donors using its URL will be redirected to the by default campaign.*

Closed campaigns are listed in the « closed campaigns » tab.

## List of thematic campaigns

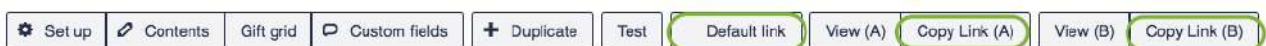


- Test a campaign



Click on this button to display all the payment form's page: A and B versions of the form + thank you pages

- Get a campaign's link



Get the direct link to spread your payment form

- See the payment form



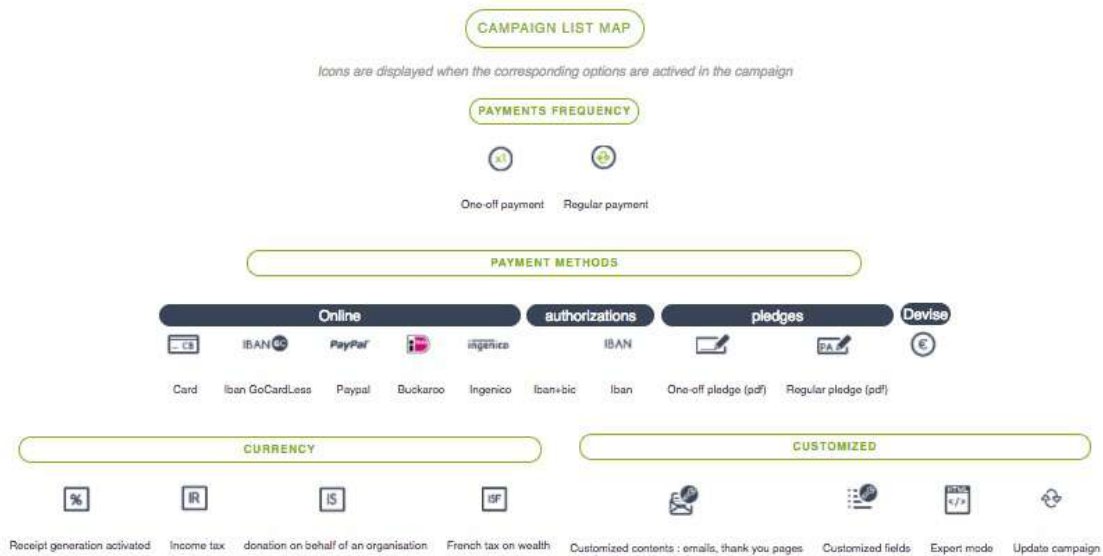
Click on the « view » buttons to display your payment form

- Change the default campaign



Set any campaign as the default campaign by clicking on the star button.

Click on the « Legend » button to see the whole campaign list map:



## 6.1. Form creation and set up

In order to create a new campaign, Go to « Campaigns » > Campaigns list and click on « create a new thematic campaign » to access the campaign creation and setting page.



## List of thematic campaigns

[+ Create a new thematic campaign](#) [Legend](#)

[Open campaigns](#) [Closed campaigns](#)

Campaign's name or id

Here you can save your settings by clicking on any « save » button, anytime. Remember that some features/section can be hidden if they are of no use for your organization.

At the top of this page, you can decide to make this campaign your default campaign (the closure option does not apply here since you are creating a new campaign and surely don't want to close it).

## Create a new thematic campaign

[← Go back to list of thematic campaigns](#)

Campaign closed  Yes  No

Default campaign?  Yes  No

### GENERAL INFORMATION

Name\*

URL\*  /

Description\*

In « General information » you can set:

- The name of your campaign (corresponding to the [campaign\_name])
- The end of your URL (you can use any compatible letter or digit)
- A description. Put any information that helps to understand what the campaign is made for.

This way, you will see right from the campaign's list all of your campaign's important parameters without having to go to its configuration page.

You will then have to choose your campaign's type:





Campaign type*	<ul style="list-style-type: none"><li>✓ Donation</li><li>Subscription</li><li><b>Membership</b></li><li>Purchase</li><li>Sponsorship</li><li>Peer to peer</li><li>Subscription to Peer to peer</li><li>Upgrade / Renew</li></ul>
Origin code	
Affectation code	

Campaign types are tags that help organizing your fundraising. Nevertheless, some of them do have specific roles and operating ways that imply they can't be used out of their specific function.

From the campaigns list, you will see these tags, they all have different colors:

The screenshot shows a list of three campaigns. Each campaign entry includes a title, a user profile, a description, and a set of icons. To the right of each entry is a colored button indicating the campaign type and a 'Test' button. Green arrows point from the text above to these buttons.

- 25 Form opé Spiff 2017** (user: spiff017) - Description: Spiff operation 2017-2018 - Tag: **Donation** (dark blue button)
- 2 Regular Payments updates** (user: renewal) - Description: Regular online payments renewal - Tag: **Upgrade / Renew** (red button)
- 3 GP Digest Subscription** (user: subscription) - Description: 2016-2018 - Tag: **Subscription** (pink button)

**Different campaign types:**

- Donation: basic campaign without any specificity, can be used freely
- Subscription: basic campaign without any specificity, can be used freely
- Membership: basic campaign without any specificity, can be used freely
- Purchase: basic campaign without any specificity, can be used freely
- Sponsorship: basic campaign without any specificity, can be used freely
- Peer to peer: can only be used for donations made via iGive [Peer2Peer](#) or [Crowdfunding](#)
- Subscription to Peer to Peer : can only be used for subscription paid for iGive [Peer2Peer](#)
- Upgrade/renew: can only be used automatically for renewal of expired credit cards (you don't need to broadcast it, the three credit card renewal emails will do the job)

Choose the campaign type that suits your project.



Campaign type*	Donation
Origin code	<input type="text"/>
Affectation code	<input type="text"/>
To export?*	<input checked="" type="radio"/> Yes <input type="radio"/> No
Code received	<input type="text"/>
Enable gift on behalf of an organization*	<input type="radio"/> Yes <input checked="" type="radio"/> No
Campaign closure date	Day <input type="text"/> Month <input type="text"/> <input type="text"/>
Maximum of donations	<input type="text"/>
Maximum of collected money	<input type="text"/>
The campaign will be closed when the maximum of donations or the maximum of collected money is reached	
<input type="button" value="Save"/>	

You must then write down your origin, affectation and receipt codes. Those fields are optional and you can use any characters, letters or digits required by your CRM or data base. If you don't use any of these services, just know that the affectation code is supposed to help you know how the donation is supposed to. The receipt code is only used by some specific services.

« To export? » is most of the time hidden and only available for platforms synchronized with EDIIS. If you are not using EDIIS, you can skip this option.

« Enable donation on behalf of a company » activate or deactivates company gifts. This will display or hide a box to tick on your form's second step: « I am making a donation on behalf of an organisation ». Once ticked, the donor will see the company's name field appear.

**MY COORDINATES**

Email \* e.g. jo.bloggs@email.com  
jean.dupont@iraiser.eu

I am making a donation on behalf of an organisation

Company e.g. Apple  
Acme Company

### Campaign automatic closure

You can schedule an automatic campaign closure. Once the requirements you've set are met, the campaign is offline and donors can no longer access the form. You can set 3 different closure conditions:

- When a specific date is reached
- When a specific number of gifts has been made on the campaign
- When a specific fundraising goal has been achieved on the campaign



If you wish to close immediately a campaign, click on the « close » button of the campaign, directly from the campaigns list, or on the « campaign closed » yes button at the top the campaign's set up page.

#### VERSION OF THE DONATION PAGE

Enable 3 steps version (A) ?*	<input checked="" type="radio"/> Yes <input type="radio"/> No
Enable 1 step version (B) ?*	<input checked="" type="radio"/> Yes <input type="radio"/> No
Default version*	<input checked="" type="radio"/> 1 step (B) <input type="radio"/> 3 steps (A)
<input type="button" value="Save"/>	

Version of the donation page lets you choose between the two forms available for each campaign: A (3 steps form) and B (1 step/page form). You can choose to activate one version (recommended) or to use both. If you use both, you will have to use the proper URL when broadcasting (link of the A version or link of the B version). The default version will be the version of the form displayed by the default link (available from the campaign's link button, on the campaign's list page).

#### TAX RELATED INFORMATION

Enable fiscal deduction?*	<input checked="" type="radio"/> Yes <input type="radio"/> No
Associated to french tax on wealth?*	<input type="radio"/> Yes <input checked="" type="radio"/> No
Enable "Gift Aid" (UK only)*	<input type="radio"/> Yes <input checked="" type="radio"/> No
Enable tax receipt generation?*	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input type="button" value="Save"/>	

Tax related information will let you choose your taxation sentence settings. Taxation varies from a country to another, be sure to choose the settings that will suit most of your campaign's donors. The taxation explanation sentence is displayed in the gift grid as soon as your donors select or write an amount. « Enable the fiscal deduction », lets you activate or de-activate the taxation explanation sentence.



If you activate it, you must choose the right rate. By default, once activated, the taxation explanation sentence is set on the « Tax deduction for individuals » as configured from the default settings section, on the « fiscal deductions » management page.

« Enable tax receipt generation » lets you activate or de-activate receipt generation for the campaign's gifts. If you click on yes, a receipt will be sent for every new or existing transaction of this campaign.

DONATION GRIDS	
Enable one off amounts?*	<input checked="" type="radio"/> Yes <input type="radio"/> No
Enable regular amounts?*	<input checked="" type="radio"/> Yes <input type="radio"/> No
Linked upgrade campaign	<input type="text"/>
Amounts to display first*	<input type="text" value="One off amounts"/>
Enable capture of free amount*	<input checked="" type="radio"/> Yes <input type="radio"/> No
<input type="button" value="Save"/>	

In the donation grid section, you can choose which type of donations will be displayed on the form (one-off or regular).

- Enable one-off amount will display the one-off gift grid (« I donate once »)
- Enable regular amount will display the regular gift grid (« I donate every month »)

You can activate one of these options or both. If you activate regular gift, be sure to create a « renew/update » campaign later, so as to automatically manage credit cards expiration. This renewal campaign should not display one-off gift. If you already have created one, just select it as « linked upgrade campaign ».

« Amount to display first » lets you choose which gift grid will be displayed first: regular or one-off.

« Enable capture of free amount » lets your donor enter any amount in the gift grid.



Choose your own amount €

From the Payment section, you will be able to choose which payment methods will be available on your form. You have two columns to set them up:

- on the right, inactive payment methods that will not be displayed on the form
- on the left, active payment methods that will be displayed on the form

Select, drag and drop inactive payment methods from the right column to the left to activate them. Some payment methods if not usable on your platform.

Once you are done, select the currency that will be displayed on your form.

### PAYMENT

Click on payment methods then drag and drop them according to your needs

Active methods for one-off	Inactive methods for one-off
	<input checked="" type="checkbox"/> Card
	One-off pledge (PDF)
	IBAN
	<input checked="" type="checkbox"/> IBAN (goCardLess)
	<input checked="" type="checkbox"/> Paypal
Active methods for regular	Inactive methods for regular
	<input checked="" type="checkbox"/> Card
	IBAN
	<input checked="" type="checkbox"/> IBAN (goCardLess)
	Regular pledge (PDF)

Currency\*

Thank you pages qualification questions are automatic additional questions you can activate. They will be displayed on the right side of the page.



### THANK YOU PAGE QUALIFYING QUESTIONS

Enable qualifying questions (one off)*	<input type="radio"/> Yes <input checked="" type="radio"/> No
Enable qualifying questions (regular)*	<input type="radio"/> Yes <input checked="" type="radio"/> No

Activate this option on the gift frequency you want, and then proceed to choose which questions you want:

### THANK YOU PAGE QUALIFYING QUESTIONS

Enable qualifying questions (one off)*	<input checked="" type="radio"/> Yes <input type="radio"/> No
Enable qualifying questions (regular)*	<input checked="" type="radio"/> Yes <input type="radio"/> No
Enable phone*	<input type="radio"/> Yes <input checked="" type="radio"/> No
Enable mobile phone*	<input type="radio"/> Yes <input checked="" type="radio"/> No
Enable date of birth*	<input type="radio"/> Yes <input checked="" type="radio"/> No
Enable avatar download*	<input type="radio"/> Yes <input checked="" type="radio"/> No
Enable support message capture*	<input checked="" type="radio"/> Yes <input type="radio"/> No
Enable option "I am a member"*	<input type="radio"/> Yes <input checked="" type="radio"/> No
Enable "gift as anonymous"*	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input type="button" value="Save"/>	

« avatar » and « anonymous gift » can only be used on iGive Peer to Peer campaigns.

Additional tracking » lets you add up tracking codes to the one settled in the default settings section (>tracking). They will only be added to the campaign you are editing.



### ADDITIONNAL TRACKING

Common JS analytics trackers (will be added to by default tracking settings)

Show shortcodes

JS analytics trackers on thank you page (will be added to by default tracking settings)

Show shortcodes

JS analytics trackers on download page (pdf) (will be added to by default tracking settings)

Show shortcodes

Save

You can edit your campaign's HTML header and integrate your own code so as to change the way your form looks and works. Don't use this HTML header editor if you don't know how to code: your campaign could end up not working at all.

### HTML HEADER

**Warning!** Edit this field only if you know what you are doing : it alters the behaviour of the application. It could cause the application slowdown or shutdown. NB: The HTML header of the campaign is included after the common HTML header

Edit the common (to all campaigns) HTML header

HTML header

Show shortcodes

Top of the page

Save

When you've set everything you needed on this page, click on the « save » button. You will be invited to set up the remaining options.



You can now set up other options for the campaign

## List of thematic campaigns

You can then click on the customization button of your campaign:

- Content
- Gift grid
- Customized fields (Premium)

Be sure to set your gift grid. Contents are optional if you set everything that is required from the default content section. You can go to this content section just to change your background image though.

Click on the « test » button to run a test of your campaign and display all of its pages.

Broadcast your campaign by clicking on the « copy » link buttons, and share your campaign's direct URL.

## 7. Gifts and contacts management

You can manage your gifts and contacts through two menus:

- Contacts
- Payments


Contacts will let you see and manage your contacts' profiles. A contact is a donor who made a gift on your form or attempted to make one.

Payments is the section where all the gifts are registered.

### 7.1. Payments





 PAYMENTS
Advanced search
Online payment
One-off payments
Regular payments
Regular commitments
Authorizations
One-off payments
Regular commitments
Pledges
One-off pledges
Regular commitments

The payment menu lets you run through all the transactions made on **Payment**, and access the details of each of them. If you are looking for a transaction, or want to know how much your campaigns made, it is the section you have to browse into. The payments menu has four sub-menus:

- Advanced search

From the advanced search page, you have a look at any transaction made or attempted, whatever the status (validated, failed, canceled, pending, etc.) or payment method used.

- Online Payments

From this section, you can find every payment processed by an online payment gateway: Ingenico ePayment (payment cards), Gocardless (online direct debit), Paypal (payment cards)... These payments are automatically processed and credited to your account (Prime offer) or the mutualized account (Starter Offer).

- Authorizations

The authorization page displays direct debits authorizations (IBAN). These authorizations will have to be sent to your bank for the money transfer to be processed. And you will have to validate authorizations confirmed by your bank. You can also use your CRM or any other compatible third service to send the information to your bank automatically. You can also subscribe to [Sлимпay](#) and automatically have the status of your payment.

- Pledges

This section displays the donation pledges (postal order, checks). Pledges will have to be validated by you if you chose to receive them by mail, and checked if you asked the donor to proceed to a postal order.



Each of these sections will display the corresponding sums, transaction lists, and search filters:

Nombre de dons  
**598**  
**29**

Montant total des dons  
**2 010 391,26 €**  
**1 486 \$**

Don moyen  
**3 361,86 €**  
**51,24 \$**

Recherche (nom ou email):  ID:

Message d'erreur:

Créé:  entre le  et le

Langue:  Mode de paiement:

**FILTRE PAR CAMPAGNE**

Campagne:

Pseudo	Nom	Email	Montant	Effectué le	Statut	Mode de paiement	
Gaspard	Omar	goma@raiser.eu	100 €	21/06/2017 11:13	Don validé	Via	<input type="button" value="View"/>
Omar	Isyaf	isomg@raiser.eu	30 €	14/06/2017 16:4	Don validé	Via	<input type="button" value="View"/>
Nia	Soriam	niaspang@raiser.eu	30 €	12/06/2017 12:2	Don validé	Via	<input type="button" value="View"/>
Melvin	Poeblos	mpoeblos@raiser.eu	30 €	12/06/2017 12:2	Don validé	Via	<input type="button" value="View"/>

If you already know the type of payment you are looking for, select the corresponding section. If you don't, use the advanced search.

### 7.1.1. Advanced search

**Administration**

- Dashboard
- CONTACTS
- PAYMENTS**
  - Advanced search
  - Online payment
  - One-off payments
  - Regular payments
  - Regular commitments
  - Authorizations
  - one-off payments
  - Regular commitments
  - Pledges
  - One-off pledges
  - Regular commitments
- CAMPAIGNS
- DEFAULT CONTENT
- DEFAULT SETTINGS
- DESIGN (EXPERT)
- SYSTEM
- LANGUAGES

Account 
Language:

## Advanced search

Number of gifts  
**596**  
**29**

Total amount of gifts  
**€ 2,010,261.26**  
**\$ 1,486**

Average gift  
**€ 3,372.92**  
**\$ 51.24**

Search (name or email):  ID:

Error message:

Créé:  From  To

Language:  Payment mode:

**FILTER BY CAMPAIGN**

Campaign:

First Name	Last Name	Email address	Amount	Created on the	Status	Payment mode	
Nia	Soriam	niaspang@raiser.eu	€ 30	12/06/2017 12:03	Validated gift	Via	<input type="button" value="View"/>
Melvin	Poeblos	mpoeblos@raiser.eu	€ 30	12/06/2017 12:03	Validated gift	Via	<input type="button" value="View"/>
Francis	Garance	gfornc@raiser.eu	€ 100	12/06/2017 12:03	Validated gift	Via	<input type="button" value="View"/>

The advanced search makes it possible to run through every single transaction made on **Payment**, whatever the status (validated, canceled, failed, pending) or the payment method used. As a result, the information displayed on the top of this page are to be taken cautiously: they mix both credited and uncredited gifts:

58 / 108



Number of gifts  
596  
29

Total amount of gifts  
€ 2,010,261.26  
\$ 1,486

Average gift  
€ 3,372.92  
\$ 51.24

If you use different currencies on your Platform, you will get as many lines of data as currencies activated.

This part of the page is updated each time you make a new search using the filters.

Search (name or email):  ID:

Created:  From:  To:

Language:  All languages ▾ Payment mode:

---

**FILTER BY CAMPAIGN**

Campaign:

The bottom part is made of filters. There are two different types of filters on the payment pages:

- Transaction filters

Those filters help you sorting your search by using transaction information: firstname, lastname, email, transaction ID, dates, languages, payment methods, error messages.

- Campaign filters

Those filters enable you to re-use the settings you chose in the campaigns' configuration as filters: campaign IDs, campaign types, origin and affectation codes, Ingenico account etc.

In order to use one, select it from the drop-down list and click on « add a filter ».

### 7.1.2. Payment details

This page gathers all the selected transaction's information available. In order to access it:

– click on the « view » button from any of payments' section pages:

First Name	Last Name	Email address	Amount	Created on the	Status	Payment mode	
Ruth	More	Route@iraiser.eu	€ 5,000	05/06/2017 02:30	Validated gift	Visa	<input type="button" value="View"/>
Ruth	More	Route@iraiser.eu	€ 9,000	05/06/2017 02:30	Validated gift	Mastercard	<input type="button" value="View"/>
Ruth	More	Route@iraiser.eu	€ 5,000	05/05/2017 02:30	Validated gift	Visa	<input type="button" value="View"/>
Ruth	More	Route@iraiser.eu	€ 9,000	05/05/2017 02:30	Validated gift	Mastercard	<input type="button" value="View"/>



- make a search on the Contacts > contacts page then click on see payments > view

ID	Email	First Name	Last Name
249	Medope@iraiser.eu	<a href="#">See payments</a>	<a href="#">Personal space</a> <a href="#">Delete personal space</a>

If you click on the « view » button you will get this type of page:

Payment details TST1920160408-1739-0124

**DONOR**

**DONATION**

**PAYMENT**

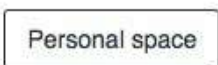
**CONTEXT**

**OTHER INFORMATION**

**RESERVED FIELDS**

The payment details page is organized into several sections:

- The personal space button



If you click on this button, you will log into the donor's personal space. If you right-click on this button, you can save this personal space direct URL.

- The donator's section



### DONOR

Mrs Ruth More	
Address 1	123 rue Pehelso 65780 Uez FRANCE
Email address	Route@iraiser.eu

Displays the details registered by the donor when he filled the donation form.

- The donation section

### DONATION

Validated gift	
€ 200	Amount from the grid
Created on the	08/04/2016 17:39:48
Date of the last status change	08/04/2016 17:39:50

Displays the transaction's information: status (validated/failed/canceled/pending etc.), amount, option chose creation date, status change date.

- The payment section

### PAYMENT

Payment mode	Visa	
Validated on the	08/04/2016 17:39:50	
Payment ID (Ingenico)	3001813176	<a href="#">See Ingenico receipt</a>
Payment status	9 (payment requested) ✓	
Card	***** 1111 (exp. 2020-01)	

Displays the information that was sent back to payment by the payment gateway terminal involved in the



processing of the transaction (Ingenico, Gocardless, Paypal). The payment ID must be communicated if you contact the payment gateway terminal. If you click on the receipt button, Payment will get the latest status of the payment and display its up-to-date receipt.

- The context section

## CONTEXT

Refer	https://test19.iraiser.eu/manager.php/manager/donations/view?id=44&frequency=regular_setup&payment_mode=online&stype=active
Query String	_cpn_=1&_cpn_name_=siteweb&lang=fr_FR
Campaign	4
Form version	b
Language	fr_FR
IP	109.7.27.250

Displays information about where the donation comes from: the URL he used to access the form (including the parameters you may have added to it), the ID of the campaign of the form, its version (A or B), the language chose, and the IP address.

**Nota bene:** in the event of a fraud or fraud attempt, you must communicate the IP when lodging your complaint.

- Other information section

## OTHER INFORMATION

Fiscal number	iRaiser-201604-00031P	 Download fiscal receipt
Date of fiscal receipt generation	13/04/2016 04:55:40	 (Re)send email notification
Gift exported	No	
Gift Aid	No	



Displays the receipt-related information. If you activated this option on the campaign on which the donation was made, it will display :

- the receipt number
- a button to download it
- the date of its creation
- a button to automatically send or re-send it to the donor
- the gift aid status on the donation (activated or not)
- \*\*the gift exported status is only relevant for Smartfocus users

- The reserved fields section

### RESERVED FIELDS

reserved_affectdo	Nep (Népal)
-------------------	-------------

If you have a Premium Payment Offer, you can add fields to the form. If you did add additional fields, you will see them here. These fields all have a tag which starts with « reserved\_ »

- The Shortcode value section

Show shortcodes values for this donation

If you click on this button, you will display all the information registered for the gift, classified by shortcodes. You can use this list in order to customize your emails / thank you pages / ODT and display the donor's personal information on them.

Depending on the payment type, the payment details page will let you cancel or cancel and refund a gift or suspend a commitment.



On a regular online payment, you will also get a button that leads to its commitment:



### DONATION

Active commitment	
€ 9,000	Free amount
Created on the	29/06/2016 14:26:35
Date of the last status change	29/06/2016 14:26:35
Debit monthly	

### 7.1.3. Online payments

The online payment section gathers every donation processed by an online payment gateway like [Ingenico ePayments](#) (payment cards), [Gocardless](#) (IBAN), [Paypal](#) (payment cards)...

The key to use this section properly is to select:

- the right **type** of donation (payment / commitment)
- the right **donation frequency** (one-off / regular)

Online payment
One-off payments
Regular payments
Regular commitments

- the right **payment status**:

Validated payments	Canceled payments	Failed payments	Suspicious payments	Pending actions
--------------------	-------------------	-----------------	---------------------	-----------------

#### 7.1.3.1. One-off payments

The « One-off payment » section gathers every single payment that was processed by an online payment gateway: [Ingenico ePayments](#), [Gocardless](#), [Paypal](#)... Those payments are automatically managed and don't need any intervention from you to be credited to your bank account (Prime Offer) or to the mutualized bank account (Starter Offer).





Administration Account  Languages:

Dashboard  CONTACTS  PAYMENTS

- Advanced search
- Online payment
- One-off payments
- Regular payments
- Regular commitments
- Authorizations
- One-off payments
- Regular commitments
- Pledges
- One-off pledges
- Regular commitments

CAMPAIGNS

- DEFAULT CONTENT
- DEFAULT SETTINGS
- DESIGN (EXPERT)
- SYSTEM
- LANGUAGES

### Online payment > One-off payments

Number of gifts: 167  
3

Total amount of gifts: € 110,512.76  
\$ 90

Average gift: € 661.75  
\$ 30

Search (name or email):  ID:

Created:  From:  To:

Language:  Payment mode:

**FILTER BY CAMPAIGN**

Campaign:

First Name	Last Name	Email address	Amount	Validated on the	Payment mode	
Nic	Sorlam	niasorlam@raiser.eu	€ 30	12/06/2017 11:00	Visa	<input type="button" value="View"/>
Melvin	Peebles	mpeebles@raiser.eu	€ 30	12/06/2017 11:00	Visa	<input type="button" value="View"/>

A transaction is registered in this section every time a donor clicks on a « donate once » option and clicks on a payment method to proceed to pay directly online.

### 7.1.3.1.1. Validated one-off online payments

Validated One-off online payments are payments that went through fine: they are being credited to your bank account (Prime) or to the mutualized Starter bank account. On this page, like on every other status of this section, you can make a search using the filters:

Administration Account  Languages:

Dashboard  CONTACTS  PAYMENTS

- Advanced search
- Online payment
- One-off payments
- Regular payments
- Regular commitments
- Authorizations
- One-off payments
- Regular commitments
- Pledges
- One-off pledges
- Regular commitments

CAMPAIGNS

- DEFAULT CONTENT
- DEFAULT SETTINGS
- DESIGN (EXPERT)
- SYSTEM
- LANGUAGES

### Online payment > One-off payments

Number of gifts: 167  
3

Total amount of gifts: € 110,512.76  
\$ 90

Average gift: € 661.75  
\$ 30

Search (name or email):  ID:

Created:  From:  To:

Language:  Payment mode:

**FILTER BY CAMPAIGN**

Campaign:

First Name	Last Name	Email address	Amount	Validated on the	Payment mode	
Nic	Sorlam	niasorlam@raiser.eu	€ 30	12/06/2017 11:00	Visa	<input type="button" value="View"/>
Melvin	Peebles	mpeebles@raiser.eu	€ 30	12/06/2017 11:00	Visa	<input type="button" value="View"/>

An *on the go export button* is also available, right below the filters.

Be cautious: the on the go export will generate a non-customizable export which includes all existing fields of the platform. This export can only be generated if it is not too heavy in relation to the platform's current activities. If your export can not be generated, an error message inviting you to use the export tool from the default settings section will be displayed. This export tool is way more powerful and will let you both automate and customize your exports.



For each registered transaction on this page, there is a « view » option. If you click on this button, you'll access the [payment details](#).

First Name	Last Name	Email address	Amount	Validated on the	Payment mode	
Nia	Sorlam	niasoplang@iraiser.eu	€ 30	12/06/2017 12:03	Visa	<a href="#">View</a>
Melvin	Peebles	mpeebles@iraiser.eu	€ 30	12/06/2017 12:02	Visa	<a href="#">View</a>
Francia	Garance	gfoncia@iraiser.eu	€ 100	12/06/2017 12:01	Visa	<a href="#">View</a>
Clive	Hart	clive@iraiser.eu	€ 50	12/06/2017 12:00	Visa	<a href="#">View</a>
Karel	Hopes	Medope@iraiser.eu	€ 560	02/06/2017 10:45	Visa	<a href="#">View</a>

### Validated one-off online payment's details

The Payment details of a validated one-off online payment let you canceling or canceling and refunding if necessary:

## Payment details TST1920170612-1203-0633

[Return to the list](#)
Personal space

#### DONOR

Mr & Mrs Nia Sorlam	
Address 1	8, place du Marché 92200 Neuilly-sur-Seine FRANCE
Email address	niasoplang@iraiser.eu

#### DONATION

Validated gift	
€ 30	<i>Amount from the grid</i>
Created on the	12/06/2017 12:03:01
Date of the last status change	12/06/2017 12:03:04

✖ Cancel
✖ Cancel and Refund

#### PAYMENT

Payment mode	Visa	
Validated on the	12/06/2017 12:03:04	
Payment ID (Ingenico)	3021196734	<a href="#">See Ingenico receipt</a>
Payment status	9 (payment requested)	

**Nota Bene:** The refund button only appears once the payment is credited to the beneficiary account. You have to wait about 24 hours after the donation occurred to refund it.



# Payment details TST1920170614-1659-0634

Return to the list
Personal space

DONOR	DONATION
Mr Chrom Intsyst	Validated gift
Address 1 8, place du Marché 92200 Neuilly-sur-Seine FRANCE	€ 30 <span style="float: right;"><small>Amount from the grid</small></span>
Email address bromng@iraiser.eu	Created on the 14/06/2017 16:59:30
	Date of the last status change 14/06/2017 16:59:33

✖ Cancel

The « Cancel » button is the only one to appear right after the payment was registered.  
 It is not possible to block a transaction after it was made. You will have to wait for it to be credited before refunding it.

## 7.1.3.1.2. Failed online one-off payments

Validated payments
Canceled payments
Failed payments
Suspicious payments
Pending actions

*Failed online payments* are payments that came across an incident. The reasons for a payment to fail are numerous: a mistake was made while filling the form, the donor's bank or yours rejected the payment...

On this page, like on each payment status section, you can make a search and use filters:

Search (name or email):  ID:

Error message:

Created  From  To

Language:  Payment mode:

**FILTER BY CAMPAIGN**

Campaign

An *on the go export button* is also available, right below the filters.

**Be cautious:** the on the go export will generate a non-customizable export which includes all existing fields of the platform. This export can only be generated if it is not too heavy in relation to the platform's current activities. If your export can not be generated, an error message inviting you to use the export tool from the default settings section will be displayed. This export tool is way more powerful and will let you both automate and customize your exports.



For each registered transaction on this page, there is a “view” option.

First Name	Last Name	Email address	Amount	Validated on the	Payment mode	
Nia	Sorlam	niasoplang@iraiser.eu	€ 30	12/06/2017 12:03	Visa	<a href="#">View</a>
Melvin	Peebles	mpeebles@iraiser.eu	€ 30	12/06/2017 12:02	Visa	<a href="#">View</a>
Francia	Garance	gfrancia@iraiser.eu	€ 100	12/06/2017 12:01	Visa	<a href="#">View</a>
Clive	Hart	clive@iraiser.eu	€ 50	12/06/2017 12:00	Visa	<a href="#">View</a>
Karel	Hopes	Medope@iraiser.eu	€ 560	02/06/2017 10:45	Visa	<a href="#">View</a>

If you click on this button, you'll access the [payment details](#), and get the reason for the failure.

### Failed one-off online payment's details

## Payment details TST1920161006-1410-0319

[Return to the list](#)

Personal space

#### DONOR

Mrs James Rooar	
Address 1	10 Rue des Romarins 33260 La Teste-de-Buch FRANCE
Email address	wokim@iraiser.eu

#### DONATION

Failed gift	
€ 12,307.89	Free amount
Created on the	06/10/2016 14:10:11
Date of the last status change	06/10/2016 14:10:13

#### PAYMENT

Payment mode	Visa
Payment ID (Ingenico)	3010103987 <a href="#">See Ingenico receipt</a>
Payment status	2 (authorisation declined)
Payment error	Payment refused by the financial institution CARD REFUSED
Card	***** 1111 (exp. 2022-01)

**Payment's** error messages that are displayed on these pages are the one sent directly by the online payment gateway used to process the payment. Please read them carefully. It will help you informing the donor if needed.

Aside from a message asking you to contact our support team, there is not much to do about a failed payment. If the error message has a number « 2 » as payment status, it means your bank or the donor's bank rejected the transaction.

You can, of course, contact directly the online payment gateway's support if you come across an error for which you would like to get more information about.



## Ingenico error guide

You can download Ingenico’s error guides here:

<http://payment-services.ingenico.com/ogone/support/~media/kdb/pdf/ogone/fr/955815bf-4514-4d75-b683-21034ff5789b/statuses-and-errors.ashx>

and here: <http://payment-services.ingenico.com/fr/fr/ogone/support/guides/user%20guides/statuses-and-errors>

## Contact Ingenico

### Ingenico - default

Account type	production
Account ID	██████████
3D secure	no

If you need to contact Ingenico, get your Ingenico account Id from « Default settings session > Technical information ». If you have questions about a peculiar transaction, note its Payment ID (from the payment’s detail page) too, and call [+44 131 459 8800](tel:+441314598800)

### DONOR

Mr Hugh Conway	
Address 1	91 rue du cherche midi APT 85 75000 Paris FRANCE
Email address	conwaysat@iraiser.eu

### DONATION

Failed gift	
€ 600	Free amount
Created on the	06/04/2016 09:22:17
Date of the last status change	06/04/2016 09:22:18

### PAYMENT

Payment mode	Visa	
Payment ID (Ingenico)	3001705229	<a href="#">See Ingenico receipt</a>
Payment error	Card number format check failed for given card number. [La vérification du numéro de carte a échoué pour le numéro de carte donné]	
Card	*****1561 (exp. 2019-01)	



### 7.1.3.1.3. Canceled online one-off payments

Canceled online one-off payments are transactions you canceled (i.e. you retrieved them from the total displayed on the validated online payment section), or canceled and refunded.

On this page, like on each payment status section, you can make a search and use filters:

Search (name or email):  ID:

Error message:

Created  From  To

Language:  Payment mode:

---

**FILTER BY CAMPAIGN**

Campaign

An *on the go export button* is also available, right below the filters.

Be cautious: the on the go export will generate a non-customizable export which includes all existing fields of the platform. This export can only be generated if it is not too heavy in relation to the platform's current activities. If your export can not be generated, an error message inviting you to use the export tool from the default settings section will be displayed. This export tool is way more powerful and will let you both automate and customize your exports.

For each registered transaction on this page, there is a "view" option. If you click on this button, you'll access the [payment details](#) and be able to follow the refunding operation or get further details about the transaction.

First Name	Last Name	Email address	Amount	Validated on the	Payment mode	
Nia	Sorlam	niasoplang@iraiser.eu	€ 30	12/06/2017 12:03	Visa	<input type="button" value="View"/>
Melvin	Peebles	mpeebles@iraiser.eu	€ 30	12/06/2017 12:02	Visa	<input type="button" value="View"/>
Francia	Garance	gfoncia@iraiser.eu	€ 100	12/06/2017 12:01	Visa	<input type="button" value="View"/>
Clive	Hart	clive@iraiser.eu	€ 50	12/06/2017 12:00	Visa	<input type="button" value="View"/>
Karel	Hopes	Medope@iraiser.eu	€ 560	02/06/2017 10:45	Visa	<input type="button" value="View"/>

### Canceled one-off online payment's details



From the payment detail page, in the « Payment section, the status and its explanation will tell you if it is only canceled or canceled and refunded.

If a refund was asked for, you have to go to the payment's detail page again, 24 hours after clicking the refund button, so as to check if everything went through fine. Most payment card will let you refund using this button, but some won't. If this happens, you have to refund without using **Payment**.



# Payment details TST1920170316-1010-0538

[Return to the list](#)

Personal space

## DONOR

Mrs Matt oto	
Address 1	19 Rue Mongenot 94160 Saint-Mandé FRANCE
Email address	matt@iraizer.eu

## DONATION

Canceled gift	
€ 200	Amount from the grid
Created on the	16/03/2017 10:10:58
Date of the last status change	30/03/2017 10:04:56

## PAYMENT

Payment mode	Visa	
Payment ID (Ingenico)	3017820029	<a href="#">See Ingenico receipt</a>
Payment status	8 (refund)	
Card	*****1111 (exp. 2023-01)	

[Return to the list](#)

Personal space

## DONOR

Mrs Matt oto	
Address 1	19 Rue Mongenot 94160 Saint-Mandé FRANCE
Email address	jjide@iraizer.eu

## DONATION

Blocked gift	
€ 30	Amount from the grid
Created on the	14/06/2017 17:20:12
Date of the last status change	14/06/2017 17:20:12

### 7.1.3.1.4 Suspicious one-off online payments

Suspicious one-off online payments are payments that were put into quarantine by **iRaiser's security algorithm**. This prevents banking interactions with the credit card so you don't have to refund. These algorithms detect robots' fraud attempts, i.e. fraud from artificial intelligent systems.

**Nota Bene: manual payment fraud can not be detected by these algorithms.**

[Revalidate \(lift the cancellation\)](#)

From the suspicious payment tab, you can see all quarantined transactions. You can request a payment for those that are not suspicious to you by clicking on the « Request the payment » button. Please contact the donor before requesting the payment.

## PAYMENT

Payment mode	Visa	
Payment ID (Ingenico)	3016781561	<a href="#">See Ingenico receipt</a>

Validated payments

Canceled payments

Failed payments

Suspicious payments

Pending actions

[> Blocked payments \(not requested\)](#)

[> Requested payments](#)

All these payments have been blocked as they have been identified as suspicious. **None of these payments have been processed**: they remain in indefinite "quarantine".

This section contents potential valid as well as failed payments. If the bank details are correct, a [Request the payment](#) button will appear in the top right part of the payment card, you will be able to process the quarantined payment.

Useful fact : We request the payment gateway provider for the potential status (valid or failed) of each of these suspected payments. This is why a ticket notifying a 0€ transaction (print) is available for each suspect payment.





Requested payments follow the normal process and are sent to **Ingenico**. After that, the transaction will be sent to the « Validated/ Failed payments section.

On this page, like on each payment status section, you can make a search and use filters:

Search (name or email):  ID:

Error message:

Created  From  To

Language:  Payment mode:

**FILTER BY CAMPAIGN**

Campaign

An *on the go* export button is also available, right below the filters.

**Be cautious:** the on the go export will generate a non-customizable export which includes all existing fields of the platform. This export can only be generated if it is not too heavy in relation to the platform's current activities. If your export can not be generated, an error message inviting you to use the export tool from the default settings section will be displayed. This export tool is way more powerful and will let you both automate and customize your exports.

For each registered transaction on this page, there is a “view” option from which you can access the full details of the payment.

### 7.1.3.1.5. Pending online one-off payments

Pending online one-off payments are transactions that did not get their final status. Their processing is longer than usual. Payments registered here will stay in this tab for maximum 72 hours.

Once the transaction appears here, **Payment** will contact the online payment gateway in charge of processing the payment every hour. If **Payment** does not get the final status within 72 hours, it will automatically register the payment as failed.

On this page, like on each payment status section, you can make a search and use filters:



Search (name or email):  ID:

Error message:

Created  From  To

Language:  Payment mode:

**FILTER BY CAMPAIGN**

An *on the go export* button is also available, right below the filters.

**Be cautious:** the on the go export will generate a non-customizable export which includes all existing fields of the platform. This export can only be generated if it is not too heavy in relation to the platform's current activities. If your export can not be generated, an error message inviting you to use the export tool from the default settings section will be displayed. This export tool is way more powerful and will let you both automate and customize your exports.

For each registered transaction on this page, there is a "view" option from which you can access the full details of the payment.

### 7.1.3.2. Regular donations

**Payment** uses two different categories to process online regular donations:

- **online payment > regular commitments**
- **online payment > regular payments**

In order to manage regular donations properly, it is really important to know what these categories are about.

#### **Regular commitment**

The « Regular commitments » page gathers all the commitments made using the platform. Regular commitments are used to actually generate regular payments every month. They are not transactions. A commitment is created every time a donor clicks on the button to validate his or her payment, after choosing a regular donation amount. A commitment is the equivalent of a contract from which the donor allows you to debit his credit card – or bank account directly – every month.

#### **Regular payments**

The « regular payments » page displays every regular payment (via payment card or IBAN processed by Gocardless) generated by active regular commitments. They are real transactions.

A new payment appears every month for each active commitment registered.



### 7.1.3.2.1. Regular commitments

An online regular commitment is the donor’s agreement for being debited, on a regular basis, via his payment card (Ingenico) or bank account (Gocardless). For Ingenico, it is a 0€ transaction from which it registers the credit card’s print, thus creating an alias, from which it will later request a payment. For Gocardless, it is an actual mandate creation order. The alias and/or the mandates will be monthly used to generate payments.

If you wish to suspend a donor’s regular gifting, you will have to suspend his or her corresponding online regular commitment. Go to the online regular commitments section, in the Payments menu, and click on suspend once you’ve found the right commitment using the search tools.

Administration Account: Judicelle | Language: English, Français | View application | Disconnect

Dashboard

CONTACTS

PAYMENTS

- Advanced search
- Online payment
- One-off payments
- Regular payments
- Regular commitments

Autorizations

- One-off payments
- Regular commitments

Pledges

- One-off pledges
- Regular commitments

CAMPAIGNS

DEFAULT CONTENT

DEFAULT SETTINGS

DESIGN (EXPERT)

SYSTEM

LANGUAGES

### Online payment > Regular commitments

Number of gifts: 18 | Total amount of gifts: € 21,515 | Average gift: € 1,195.28

Active commitments | Suspended commitments | Failed commitments | Pending actions

Search (name or email): \_\_\_\_\_ ID: \_\_\_\_\_

Created: \_\_\_\_\_ From: \_\_\_\_\_ To: \_\_\_\_\_

Language: All language... | Payment mode: \_\_\_\_\_

Search

**FILTER BY CAMPAIGN**

Campaign: \_\_\_\_\_ Add a filter

Search

Export in CSV

First Name	Last Name	Email address	Amount	Validated on the	Payment mode		
Gary	Sirias	garysain@raiser.eu	€ 2,330	23/05/2017 16:43	Mastercard	<a href="#">View</a>	<a href="#">Suspend</a>
Melvin	Calhou	melvinpbg@raiser.eu	€ 93	23/05/2017 16:43	Mastercard	<a href="#">View</a>	<a href="#">Suspend</a>

The online regular commitment page has several tabs :

Active commitments | Suspended commitments | Failed commitments | Pending actions

- Active commitments

The active regular commitments tab displays every active online regular commitment registered. Those commitments are generating regular payments every month. As a result, you will have to suspend them if you want to end an online monthly payment.

- Suspended comments

The regular suspended commitments tab displays every regular online commitment that you suspended. Once suspended, an online regular commitment will never request a new payment again. The suspension is definitive, it is not possible to reactivate a suspended online regular commitment.

- Failed commitments

The online failed regular commitment tab displays failed commitments. A failed commitment could not be activated and can't request any payment.



- Pending actions

Pending online regular commitments are commitments that did not get their final status yet. Their processing is longer than usual. commitments registered here will stay in this tab for maximum 72 hours. Once the commitment appears here, **Payment** will contact the online payment gateway in charge of creating the alias or the mandate every hour. If **Payment** does not get the final status within 72 hours, it will automatically register the commitment as failed.

From each tab, like in every Payments' menu section page, you can make a search and use filters:

Search (name or email):  ID:

Created:  From:  To:

Language:  Payment mode:

**FILTER BY CAMPAIGN**

Campaign:

An *on the go export button* is also available, right below the filters.

**Be cautious:** the on the go export will generate a non-customizable export which includes all existing fields of the platform. This export can only be generated if it is not too heavy in relation to the platform's current activities. If your export can not be generated, an error message inviting you to use the export tool from the default settings section will be displayed. This export tool is way more powerful and will let you both automate and customize your exports.

For each registered transaction on this page, there is a "view" option from which you can access the full details of the commitment.

### Regular online commitment's details

Since all the other online commitment details have the same properties as the ones we saw in the online payment details pages, we will have a closer look at the regular online commitment's details. It displays a button to suspend it, and an overview of all the corresponding payments requested, with their current status.

## Payment details TST1920160224-1259-0057

### DONOR

Mrs Nina TChompon	
Address 1	15 rue Milko 98078 Mofoz FRANCE
Email address	freza@huiopmi.com

### DONATION

Active commitment	
€ 500	Free amount
Created on the	24/02/2016 12:59:20
Date of the last status change	24/02/2016 12:59:22
Debit monthly	



### 7.1.3.2.2. Regular online Payments

The « Regular payments » page, in « Online payments » displays every online regular payment generated by active online regular commitments.

Administration Account: Judicelle | Language: English, Français | View application | Disconnect

#### Online payment > Regular commitments

Number of gifts  
**18**

Total amount of gifts  
**€ 21,515**

Average gift  
**€ 1,195.28**

Active commitments | Suspended commitments | Failed commitments | Pending actions

Search (name or email):  ID:

Created:  From:  To:

Language: All language... | Payment mode:

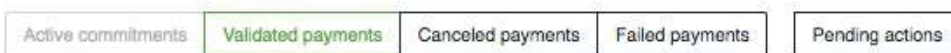
**FILTER BY CAMPAIGN**

Campaign:

First Name	Last Name	Email address	Amount	Validated on the	Payment mode		
Gary	Sirias	garys@raisereu	€ 2,300	23/05/2017 16:40	Mastercard	<input type="button" value="View"/>	<input type="button" value="Suspend"/>
Malvin	Callou	malvin@raisereu	€ 50	23/05/2017 16:40	Mastercard	<input type="button" value="View"/>	<input type="button" value="Suspend"/>

These are real transactions made by payment card (Ingenico) or IBAN processed by Gocardless. As a result, they can be refunded if needed.

The online regular commitments page has several tabs:



- Validated payments

The validated payments tab displays every regular online payment that is valid and that is or will be credited to your bank account.

- Canceled payments

The canceled payments tab displays every regular online payment that you canceled and refunded.

- Failed payments



The failed payments tab displays every regular online payment that did not succeed. click on the « View » button to know what happened.

- Pending actions

The pending actions tab displays every regular payment for which **Payment** did not get the final status yet. Their processing is longer than usual. Payments registered here will stay in this tab for maximum 72 hours. Once the payment appears here, **Payment** will contact the online payment gateway in charge of creating the alias or the mandate every hour. If **Payment** does not get the final status within 72 hours, it will automatically register the payment as failed.

On this page, like on each payment status section, you can make a search and use filters:

The screenshot shows a search interface with two main sections. The top section has a search bar with 'Search (name or email):' and 'ID:' fields, a 'Created' dropdown, 'From' and 'To' date pickers, a 'Language:' dropdown set to 'All languages', and a 'Payment mode:' field. A 'Search' button is at the bottom left. The bottom section is titled 'FILTER BY CAMPAIGN' and features a 'Campaign' dropdown, an '+ Add a filter' button, and another 'Search' button.

An *on the go export button* is also available, right below the filters.

**Be cautious:** the on the go export will generate a non-customizable export which includes all existing fields of the platform. This export can only be generated if it is not too heavy in relation to the platform's current activities. If your export can not be generated, an error message inviting you to use the export tool from the default settings section will be displayed. This export tool is way more powerful and will let you both automate and customize your exports.

For each registered transaction on this page, there is a “view” option from which you can access the full details of the payment.

### Focus on the validated regular online payment's details

A regular online payment's details will display a button to cancel and refund it, and a button that leads to the corresponding commitment.



## Payment details TST1920161205-DR294-425

[Return to the list](#)

[Personal space](#)

### DONOR

Mr Yami Gami	
Address 1	10 Rue des Romarins 33260 La Teste-de-Buch FRANCE
Email address	light@iraiser.eu

### DONATION

Validated gift	
\$ 50	<i>Amount from the grid</i>
Created on the	05/12/2016 02:30:18
Date of the last status change	05/12/2016 03:24:12
Debit monthly	

[Cancel and Refund](#)

[See the associated commitment](#)

## 7.1.4. Authorizations

The « Authorizations » section gathers all the IBAN (/BIC) direct debit authorizations.

Dashboard
CONTACTS
PAYMENTS
Advanced search
▼ Online payment
One-off payments
Regular payments
Regular commitments
▼ Authorizations
One-off payments
Regular commitments
▼ Pledges
One-off pledges
Regular commitments

Every time a donor fills the IBAN (BIC) field(s) and clicks the validation button, a new authorization is created.



**Nota Bene: Contrary to online payments, direct debit authorizations are not automatic and have to be sent to your bank. The payment platform does not create mandate or send automatically your authorizations. You will either have to export these data and send them to your bank or to use a compatible and synchronized third service to manage them and communicate with your bank.**

On this « Authorizations » page, like on each « Payments » page, you can make a search and use filters:

An *on the go export button* is also available, right below the filters.

**Be cautious:** the on the go export will generate a non-customizable export which includes all existing fields of the platform. This export can only be generated if it is not too heavy in relation to the platform's current activities. If your export can not be generated, an error message inviting you to use the export tool from the default settings section will be displayed. This export tool is way more powerful and will let you both automate and customize your exports.

For each registered transaction on this page, there is a "view" option from which you can access the full details of the payment.

### 7.1.4.1. One-off payment authorizations

The one-off payment authorizations section displays every direct debit authorizations (IBAN/BIC).

A new authorization is registered here every time a donor chooses a one-off gift amount, enters his or her IBAN





(/BIC) and clicks on the validation button of the payment.

From each tab, like in every Payments' menu section page, you can make a search and use filters:

The image shows two stacked search and filter panels. The top panel has a search bar with 'Search (name or email):' and 'ID:' fields, a 'Created' dropdown, 'From' and 'To' date pickers, a 'Language: All languages' dropdown, and a 'Payment mode:' field. The bottom panel is titled 'FILTER BY CAMPAIGN' and has a 'Campaign' dropdown and an 'Add a filter' button. Both panels have a 'Search' button at the bottom.

An *on the go export* button is also available, right below the filters.

**BE CAUTIOUS: THE ON THE GO EXPORT WILL GENERATE A NON-CUSTOMIZABLE EXPORT WHICH INCLUDES ALL EXISTING FIELDS OF THE PLATFORM. THIS EXPORT CAN ONLY BE GENERATED IF IT IS NOT TOO HEAVY IN RELATION TO THE PLATFORM'S CURRENT ACTIVITIES. IF YOUR EXPORT CAN NOT BE GENERATED, AN ERROR MESSAGE INVITING YOU TO USE THE EXPORT TOOL FROM THE DEFAULT SETTINGS SECTION WILL BE DISPLAYED. THIS EXPORT TOOL IS WAY MORE POWERFUL AND WILL LET YOU BOTH AUTOMATE AND CUSTOMIZE YOUR EXPORTS.**

For each registered transaction on this page, there is a “view” option from which you can access the full details of the authorization.

### 7.1.4.1.1. One-off payment authorization statuses



- Valid authorizations

Valid one-off payment authorizations are direct debit authorizations that were successfully registered and that you validated as being credited to your account.

If you use [Sлимпay](#), this tab displays the authorizations that got a mandate and were processed successfully by Sлимпay.

- Failed authorisations

If you use Sлимпay, this tab displays all the failed authorizations that Sлимпay could not process successfully.

- Processing waiting for confirmation

This tab displays all the one-off payment authorizations waiting to be processed. You have to export them and send them to the bank. If the bank confirms the money transfer, you can validate them. If it fails, you have to mark the as failed.

Do it either directly from the authorizations list, or click on the view button to do it.



First Name	Last Name	Email address	Amount	Created on the	Payment mode	
Raëlle	Sierie	fvgeo@fraiser.eu	€ 10	28/06/2017 15:11	IBAN	<input type="button" value="View"/> <input type="button" value="Confirm"/> <input type="button" value="Cancel"/>

If you are using Slimpay, this section displays the authorizations waiting to be processed by Slimpay.

### 7.1.4.2. Regular commitment authorizations

The « Regular commitments » section gathers all the regular direct debit authorizations (IBAN (/BIC)

Administration Account:  Languages:

- Dashboard
- CONTACTS
- PAYMENTS
  - Advanced search
  - Online payment
    - One-off payments
    - Regular payments
    - Regular commitments
- AUTHORIZATIONS
  - One-off payments
  - Regular commitments
- PLEDGES
  - One-off pledges
  - Regular commitments
- CAMPAIGNS
- DEFAULT CONTENT
- DEFAULT SETTINGS

## Authorizations > Regular commitments

Number of gifts

11

Total amount of gifts

€ 1,387

Average gift

€ 126.09

Search (name or email):  ID:

Created:  From:  To:

Language:  Payment mode:

**FILTER BY CAMPAIGN**

Campaign:

On this regular commitment authorizations page, like on each "Payments" page, you can make a search and use filters:

Search (name or email):  ID:

Created:  From:  To:

Language:  Payment mode:

**FILTER BY CAMPAIGN**

Campaign:

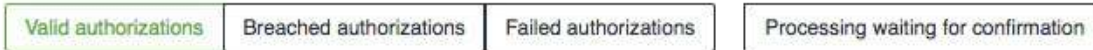
An *on the go export button* is also available, right below the filters.

Be cautious: the on the go export will generate a non-customizable export which includes all existing fields of the platform. This export can only be generated if it is not too heavy in relation to the platform's current activities. If your export can not be generated, an error message inviting you to use the export tool from the default settings section will be displayed. This export tool is way more powerful and will let you both automate and customize your exports.



For each registered transaction on this page, there is a “view” option from which you can access the full details of the authorization.

### 7.1.4.2.1. Regular commitment authorization statuses



- Valid commitment authorizations

Valid commitment authorizations are the commitment authorizations you validated once your bank activated the mandate thanks to the data you sent them.

If you use Slimpay, Slimpay will automatically validate the authorizations for which the mandate is active.

- Breached commitment authorizations

This tab displays all the commitment authorizations you stopped. A breached authorizations can not be re-activated. Be sure to contact your bank in order to stop the commitment before marking it as breached from Payment’s back-end, as the authorization management is not automatic.

If you use Slimpay, you can stop authorizations commitment directly from payment’s back-end, and Slimpay will end the commitment at your bank.

- Failed commitment authorizations

If you use Slimpay, this tab displays all the failed authorizations that Slimpay could not process successfully.

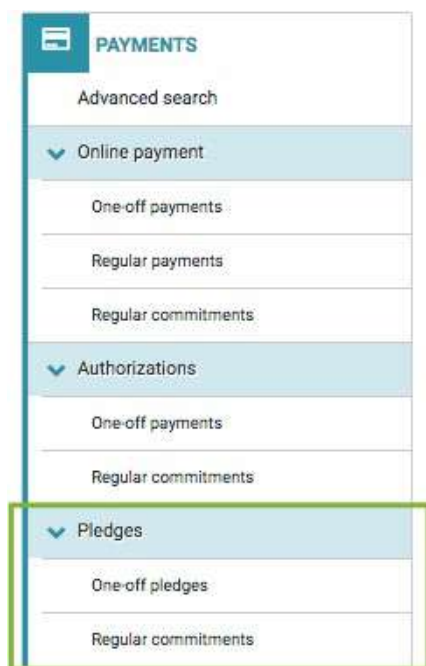
- Processing waiting for confirmation

This tab displays all the regular commitments authorizations waiting to be processed. You have to export them and send them to the bank. If the bank confirms the money transfer, you can validate them. If it fails, you have to mark them as failed. Do it either directly from the authorizations list, or click on the view button to do it.

First Name	Last Name	Email address	Amount	Created on the	Payment mode	
Raëlle	Siemie	tvgeo@traiser.eu	€ 10	28/05/2017 15:11	IBAN	<a href="#">View</a> <a href="#">Confirm</a> <a href="#">Cancel</a>

If you are using Slimpay, this section displays the authorizations waiting to be processed by Slimpay.

### 7.1.5. Pledges



The « Pledge » section gathers all the pledge made by your donor. When a donor makes a pledge, he either will:

- send you by postal mail his payment (check or signed mandate with an IBAN)
- or make a direct debit from his bank account (regular or one-off)

Pledges are not automatic. They have to be validated by you, once you received or cashed the payment.

### 7.1.5.1. One-off payment pledges

The « one-off pledges » page gathers every one-off gift pledge.



Administration Account: Judicial80 Languages: English Français View application Disconnect

Dashboard

- CONTACTS
- PAYMENTS
  - Advanced search
  - Online payment
  - One-off payments
  - Regular payments
  - Regular commitments
- AUTHORIZATIONS
  - One-off payments
  - Regular commitments
- PLEDGES
  - One-off pledges
  - Regular commitments
- CAMPAIGNS
- DEFAULT CONTENT
- DEFAULT SETTINGS
- DESIGN (EXPERT)
- SYSTEM
- LANGUAGES

### Pledges > One-off pledges

Number of gifts  
**4**

Total amount of gifts  
**€ 280**

Average gift  
**€ 70**

Validated pledges Archived pledges Pending pledges

Search (name or email):  ID:

Created:  From:  To:

Language: All languages Payment mode:

Search

**FILTER BY CAMPAIGN**

Campaign:  + Add a filter

Search

First Name	Last Name	Email address	Amount	Created on the	Payment mode	
Julie	Fouche	fred@reiser.eu	€ 50	01/06/2017 13:06	check	<input type="button" value="View"/> <input type="button" value="Confirm"/> <input type="button" value="Cancel"/>
Safia	Hybin	sahfia@reiser.eu	€ 100	01/06/2017 11:59	check	<input type="button" value="View"/> <input type="button" value="Confirm"/> <input type="button" value="Cancel"/>

A one-off pledge can be either:

- a check
- or a bank direct debit

In each case, the donor will have to download a pdf from the thank you page. He will also receive it attached to the thank you email. He will have to send you back by postal mail with the check, or send it to his bank for the direct debit.

On this »one-off pledges » page, like on each “Payments” page, you can make a search and use filters:

Search (name or email):  ID:

Created:  From:  To:

Language: All languages Payment mode:

Search

**FILTER BY CAMPAIGN**

Campaign:  + Add a filter

Search

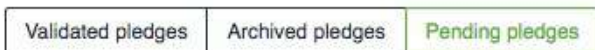
An *on the go export button* is also available, right below the filters.

**Be cautious:** the on the go export will generate a non-customizable export which includes all existing fields of the platform. This export can only be generated if it is not too heavy in relation to the platform’s current activities. If your export can not be generated, an error message inviting you to use the export tool from the default settings section will be displayed. This export tool is way more powerful and will let you both automate and customise your exports.



For each registered pledge on this page, there is a “view” option from which you can access the full details of the pledge.

### 7.1.5.1.1. One-off payment pledges statuses



- Validated pledges

Validated pledges are pledges you validated after receiving the payment (direct debit) on your bank account or cashing the check.

- Archived pledges

Archived pledges are pledges you canceled because you did not get the payment from the donor.

- Pending pledges

Pending pledges are pledges waiting to be validated or canceled by you, by clicking on the buttons directly on this page, or after clicking on « view »

First Name	Last Name	Email address	Amount	Created on the	Payment mode	
Satia	Hybri	satia@raisier.eu	€ 100	01/06/2017 10:00	check	<a href="#">View</a> <a href="#">Confirm</a> <a href="#">Cancel</a>

### 7.1.5.2. Regular commitment pledges

The « Regular commitments » page gathers every regular donations commitment.



Administration

Account: [Judicaille](#) Languages: [English](#) [Français](#) [View application](#) [Disconnect](#)

Dashboard

CONTACTS

PAYMENTS

- Advanced search
- Online payment
- One-off payments
- Regular payments
- Regular commitments

Authorizations

- One-off payments
- Regular commitments

Pledges

- One-off pledges
- Regular commitments

CAMPAIGNS

DEFAULT CONTENT

DEFAULT SETTINGS

DESIGN (EXPERT)

SYSTEM

LANGUAGES

### Pledges > Regular commitments

Number of gifts: 1

Total amount of gifts: € 15

Average gift: € 15

Validated pledges | Suspended pledges | Archived pledges | Pending pledges

Search (name or email):  ID:

Created:  From:  To:

Language: All languages | Payment mode:

Search

**FILTER BY CAMPAIGN**

Campaign:  + Add a filter

Search

Export in CSV

First Name	Last Name	Email address	Amount	Created on the	Payment mode
Ruth	More	Routte@saizer.eu	€ 15	20/04/2017 09:57	direct debit

[View](#) [Confirm](#) [Cancel](#)

A regular commitment pledge can be:

- A direct debit authorization you'll have to send to your bank
- A direct debit authorization the donor will have to send to his or her bank

In each case, the donor will have to download a pdf on the thank you page and send it back by postal mail, either to you with the direct debit authorization signed and his or her IBAN or to his bank so as to activate the regular direct debit. Please note that the pdf will also be sent attached to the thank you email.

On this « regular commitment pledges » page, like on each “Payments” page, you can make a search and use filters:

Search (name or email):  ID:

Created:  From:  To:

Language: All languages | Payment mode:

Search

**FILTER BY CAMPAIGN**

Campaign:  + Add a filter

Search

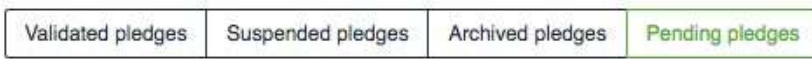
An *on the go export button* is also available, right below the filters.

**Be cautious:** the on the go export will generate a non-customizable export which includes all existing fields of the platform. This export can only be generated if it is not too heavy in relation to the platform's current activities. If your export can not be generated, an error message inviting you to use the export tool from the default settings section will be displayed. This export tool is way more powerful and will let you both automate and customize your exports.

For each registered pledge on this page, there is a “view” option from which you can access the full details of the pledge.



### 7.1.5.2.1. Regular payment pledges statuses



- Validated pledges

Validated pledges are pledges you validated after receiving the direct debit on your account (be it directly activated by the donor with his or her bank, or activated by your sending it to your bank)

- Suspended pledges

Suspended pledges are pledges you suspended after canceling them with your bank.

- Archived pledges

Archived pledges are pledges you archived because you did not get the payment.

- Pending pledges

Pending pledges are pledges waiting for you to validated them or cancel them, directly from this page or by clicking on the « view button ».

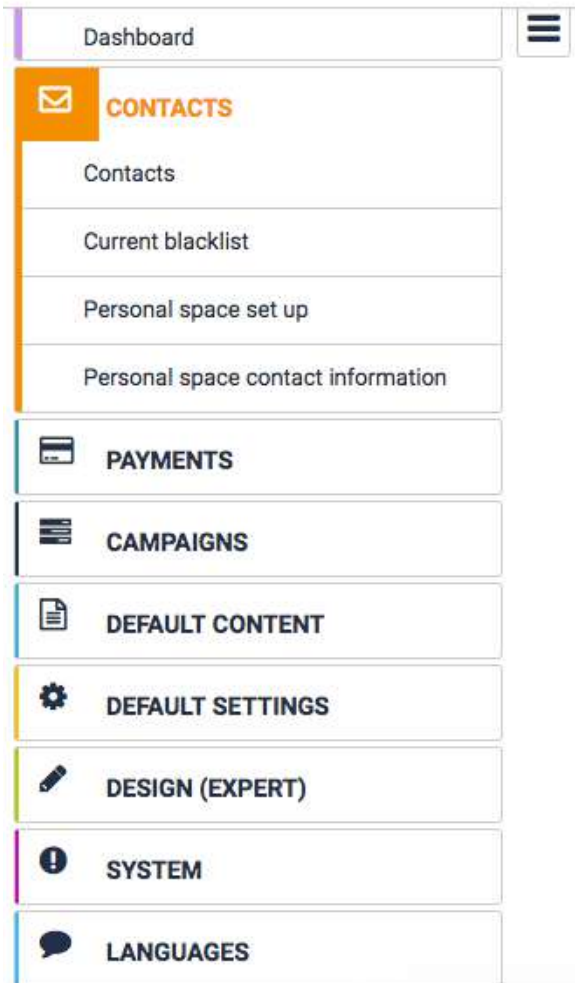
Prénom	Nom	Email	Montant	Effectué le	Mode de paiement	
Ruth	More	Route@traiser.eu	15 €	20/04/2017 08:57	prélèvement automatique	Voir  Valider  Annuler

## 8. "Contacts" section





## Administration



First entry of the left menu, the « Contacts » section will let you:

- search through your contact base, find and manage donors' personal spaces
- configure the modifications that donors will be able to from their personal spaces
- set up an information message that will be displayed in the personal space
- manage contacts registered in the blacklist

### 8.1. Contacts



Administration

Account:

Judicaëlle

Languages:

English

Français

View application

Disconnect

Dashboard
<b>CONTACTS</b>
Contacts
Current blacklist
Personal space set up
Personal space contact information
<b>PAYMENTS</b>
<b>CAMPAIGNS</b>
<b>DEFAULT CONTENT</b>

## Search for a contact

Contact's name or email address

Search

ID	Email	First Name	Last Name
244	cartmanne@iraiser.eu	Bruce	Cartmann
243	garysin@iraiser.eu	Gary	Sinise

From this page, you can use a search field in order to find contact/donor's information. In order to do so, we highly recommend the use of the email that was used to make the payment. The email is one of the main IDs used by **Payment** and it will let you find for sure what you are looking for.

You can also use the lastname, firstname (beware of homonyms) or a part of the email address if you don't know it exactly, for instance: « @aol.com »

The search result will let you pick 3 different options, for each contact:

ID	Email	First Name	Last Name
249	Medope@iraiser.eu	<a href="#">See payments</a>	<a href="#">Personal space</a> <a href="#">Delete personal space</a>

- **See payments:** have a look at every single payment, or payment attempt made by the contact you made a search for. The results provided will include every transaction, whatever the status is: validated, failed, canceled, pending. Their colors will help you recognize them.



Ruth More (Route@iraiser.eu)

Number of gifts  
53

Total amount of gifts  
€ 251,431.24

Average gift  
€ 4,743.99

First Name	Last Name	Email address	Amount	Created on the	Status	Payment mode	
Ruth	More	Route@iraiser.eu	€ 5,000	05/06/2017 02:30	Validated gift	Visa	<input type="button" value="View"/>
Ruth	More	Route@iraiser.eu	€ 9,000	05/06/2017 02:30	Validated gift	Mastercard	<input type="button" value="View"/>
Ruth	More	Route@iraiser.eu	€ 5,000	05/05/2017 02:30	Validated gift	Visa	<input type="button" value="View"/>
Ruth	More	Route@iraiser.eu	€ 9,000	05/05/2017 02:30	Validated gift	Mastercard	<input type="button" value="View"/>
Ruth	More	Route@iraiser.eu	€ 100	04/05/2017 06:40	Validated pledge	check	<input type="button" value="View"/>
Ruth	More	Route@iraiser.eu	€ 15	20/04/2017 09:57	Waiting pledge	direct debit	<input type="button" value="View"/> <input checked="" type="button" value="Confirm"/> <input type="button" value="Cancel"/>
Ruth	More	Route@iraiser.eu	€ 5,000	05/04/2017 02:30	Validated gift	Visa	<input type="button" value="View"/>
Ruth	More	Route@iraiser.eu	€ 9,000	05/04/2017 02:30	Validated gift	Mastercard	<input type="button" value="View"/>
Ruth	More	Route@iraiser.eu	€ 5,000	05/03/2017 02:30	Validated gift	Visa	<input type="button" value="View"/>
Ruth	More	Route@iraiser.eu	€ 9,000	05/03/2017 02:30	Validated gift	Mastercard	<input type="button" value="View"/>
Ruth	More	Route@iraiser.eu	€ 5,000	07/02/2017 18:00	Active commitment	Visa	<input type="button" value="View"/> <input type="button" value="Suspend"/>
Ruth	More	Route@iraiser.eu	€ 250	07/02/2017 14:58	Suspended gift	Visa	<input type="button" value="View"/>
Ruth	More	Route@iraiser.eu	€ 500	07/02/2017 14:58	Suspended gift	Visa	<input type="button" value="View"/>
Ruth	More	Route@iraiser.eu	€ 1,000	07/02/2017 14:58	Suspended gift	Visa	<input type="button" value="View"/>

- **Personal space:** access the donor’s personal space.
- **Delete personal space:** delete the donor’s personal space. Be careful:
  - This deletion is permanent. You or the donor won’t be able to access this page anymore.
  - Deleting the personal space does not mean deleting the transactions data, or any of the donor’s personal data. If you wish to delete permanently a donor’s personal data, please contact the [support](#).

## 8.2. Blacklist

The Blacklist is one of **Payment**’s numerous security systems. It is the most obvious one. Its job is to

- prevent a transaction from being debited several times by clicking more than once on the pay button
- prevent manual credit card fraud
- block any donor who made three consecutive failed payments

### 8.2.1. How the blacklist works



**Administration** Account: **Judicaëlle** Languages: **English** **Français** [View application](#) [Disconnect](#)

Dashboard

**CONTACTS**

- Contacts
- Current blacklist**
- Personal space set up
- Personal space contact information

**PAYMENTS**

**CAMPAIGNS**

## Current blacklist

Email address	
clive@iraiser.eu	<a href="#">Delete</a>
gfoncia@iraiser.eu	<a href="#">Delete</a>
mpeebles@iraiser.eu	<a href="#">Delete</a>
niasoplang@iraiser.eu	<a href="#">Delete</a>

- **Payment**'s blacklist registers donors' email, every time they make a one-off online payment. Once a transaction is validated, it is not possible to make a donation again, using the same email address, for 24 hours. Once this delay is passed, blacklisted emails are automatically whitelisted and they can be used to make new payments. This system prevents donors – who click or push the payment validation button several times – from being debited as many times as they ordered a payment.
- Donors who make 3 consecutive failed payments, will have their emails blacklisted for 24 hours.
- **Payment** will also automatically add to its blacklist any user who ran into a fraud suspicion on one of its connected payment terminals (Ingenico, PayPal, Gocardless etc.)
- Finally, the blacklist will also decrease manual credit card fraud on your platform. Any fraudulent user who would not empty the form after every single attempt will be blocked.

If you wish to unlock a donor's email, simply click on delete, directly from the blacklist. He will instantly be allowed to make a new donation.

**Administration** Account: **Judicaëlle** Languages: **English** **Français** [View application](#) [Disconnect](#)

Dashboard

**CONTACTS**

- Contacts
- Current blacklist**
- Personal space set up
- Personal space contact information

**PAYMENTS**

**CAMPAIGNS**

## Current blacklist

Email address	
clive@iraiser.eu	<a href="#">Delete</a>
gfoncia@iraiser.eu	<a href="#">Delete</a>
mpeebles@iraiser.eu	<a href="#">Delete</a>
niasoplang@iraiser.eu	<a href="#">Delete</a>

### 8.2.2. Blacklist deactivation

We highly recommend that you don't deactivate the blacklist:



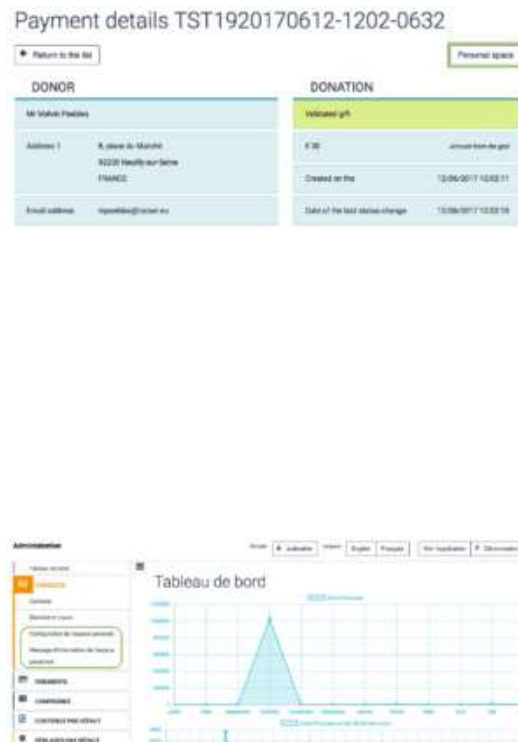
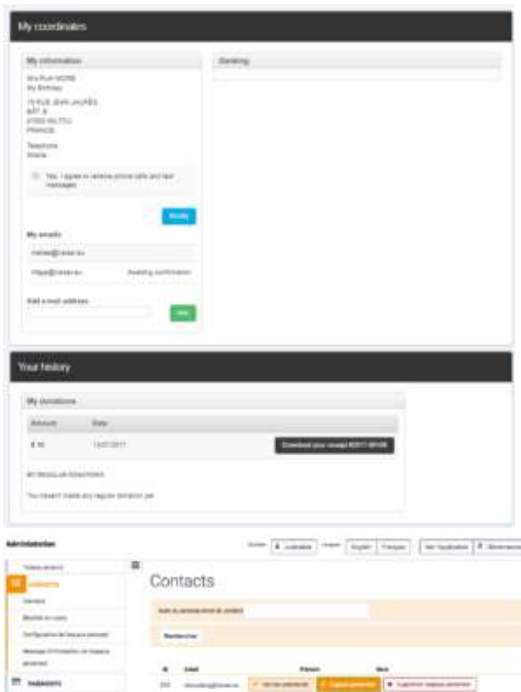
- this would weaken the security of your platform, and make it more exposed to *credit card manual fraud*
- this would also increase occurrences of multiple validations of a single gift
- a donor does not often make more than one « classic » donation a day

Nevertheless, you can ask for the deactivation of the blacklist for one of several campaign types to `_support_`. For example, you can ask to deactivate the blacklist for donations made on a subscription campaign, so that a donor can make both a subscription and a gift on the same day.

If you use **iGive**, you can deactivate it for *Peer2Peer* and *Peer2Peer Subscription* campaigns, in order to allow a collector to both create a page and make donations, or to allow its relatives to make several donations on his page per day.

We highly recommend not to deactivate the blacklist on your most easily accessible form, the one behind the main gift button of your website.

### 8.3. Personal space



From the personal space page, the donor can:

- modify his or her personal details
- download receipts (if activated)

regular donors can:

- upgrade their credit card information
- modify their regular donation's amount

Those modifications are only available once you set them up in the « Personal space set up » page.



### 8.3.1. Log in to the personal space

– via the contacts menu, from the search result :

Administration Account: Judicaëlle Languages: English Français View application Disconnect

Dashboard

**CONTACTS**

- Contacts
- Current blacklist
- Personal space set up
- Personal space contact information

**PAYMENTS**

**CAMPAIGNS**

## Search for a contact

Contact's name or email address

**Search**

ID	Email	First Name	Last Name
253	niasoplang@iraiser.eu	<a href="#">See payments</a>	<a href="#">Personal space</a> <a href="#">Delete personal space</a>

– via a payment details' page:

Payment details TST1920170523-1643-0602 Personal space

[Return to the list](#)

DONOR	
Mr Gary Sinise	
Address 1	19 Rue Mongenot 94160 Saint-Mandé FRANCE
Email address	garysin@iraiser.eu

DONATION	
Active commitment	
€ 2,300	Free amount
Created on the	23/05/2017 16:43:50
Date of the last status change	23/05/2017 16:43:52
Debit monthly	

By clicking on one of those buttons, you actually log in as the donor. As a result, you have the exact same rights as the donor himself while being on this page. Those rights can be set up from the [personal space set up page](#).

### 8.3.2. Personal space set up



Administration Account: Judkaeile Language: English Français View application Disconnect

Dashboard

**CONTACTS**

- Contacts
- Current blacklist
- Personal space set up
- Personal space contact information

PAYMENTS

CAMPAIGNS

DEFAULT CONTENT

DEFAULT SETTINGS

DESIGN (EXPERT)

SYSTEM

LANGUAGES

## Personal space set up

### PERSONAL INFORMATIONS

Allow to edit lastname and firstname	<input checked="" type="checkbox"/>
--------------------------------------	-------------------------------------

### REGULAR DONATIONS

Allow to stop	<input checked="" type="checkbox"/>
Allow to suspend temporary	<input checked="" type="checkbox"/>
Months to suspend	<input type="text" value="1"/>
Allow to decrease	<input checked="" type="checkbox"/>
Rate for decrease	<input type="text" value="100"/>
Rate for increase	<input type="text" value="100"/>

From this page, you can decide what the donor will be able to modify from his personal space:

- Personal details

Tick the « Allow to edit lastname and firstname » box, if you want your donors to be able to modify their personal details.

- Regular donations

Tick the « allow to stop » box to let your donor stop permanently their monthly donation.

Tick the « allow to suspend temporary » box to let your donor suspend temporarily their regular donations and choose for how many months they will be able to skip their monthly donation.

Tick the « allow to decrease » box to let your donor decrease the amount of their monthly donation. If you do, your donor will be able to decrease the amount of his monthly donation, within the limitation set in the « rate for decrease field ». The increase rate will only suggest amount corresponding to the rate you set up but won't prevent the donor from increasing, more importantly, his gift.

Click on save to save all of your settings before leaving the page.

### 8.3.3. Personal space contact informations

You can set an information message up and display it in the donor's personal space.

Right below the text editor, there is a drop down list menu you can use to determine who can see this message : **Payment's** users or the donor, by selecting either « Public » or « Private »

We highly recommend displaying an information message for donors if you decide not to let donor's modifying their contact details or their regular donation freely.



Bienvenue sur votre espace personnel Déconnexion



Si vous rencontrez un problème ou souhaitez des informations sur votre espace personnel, contactez André Trois au 01 43 74 43 75.

### Vos coordonnées

**Données personnelles**

Mme Francia GARANCE  
Né(e) le  
8, PLACE DU MARCHÉ  
92200 NEUILLY-SUR-SEINE  
FRANCE

Téléphone :  
Portable :

Oui, j'accepte de recevoir des appels téléphoniques et des SMS

[Modifier](#)

**Mes emails**

Ajouter une adresse Email

[Ajouter](#)

**Données bancaires**

### 8.3.4. How to use the personal space

Here is a donor's personal space. This donor has both made one-off and regular gifts. The personal space is divided into two parts:





- the donor's personal details
- the donor' payment history

The screenshot shows the 'Votre espace personnel' (Your personal space) page on the iRaiser website. At the top, there is a navigation bar with 'Déconnexion' (Logout) and a welcome message. Below this, a yellow box contains contact information for André Tross. The main content is divided into two sections: 'Vos coordonnées' (Your details) and 'Votre historique' (Your history).

**Vos coordonnées**

**Données personnelles**

R.N. More  
Né(e) le 01/01/1900  
123 rue Pétrole  
65780 Uzès  
FRANCE  
Téléphone  
Portable  
 Oui, j'accepte de recevoir des appels téléphoniques et des SMS

**Modifier**

**Mes emails**

Roulet@raisier.eu  
devnum@raisier.eu [Ajouter](#)

**Ajouter une adresse Email**

**Ajouter**

**Données bancaires**

**Votre historique**

**Financier**

Montant	Date
200 €	08/04/2016

**DONS RÉGULIERS**

Prochain prélèvement : Mai 2016

Montant	Modifier	Suspendre 4 mois
9 058,36 € par mois	<a href="#">Modifier</a>	<a href="#">Suspendre 4 mois</a>

[Modifier à partir de votre carte bancaire](#)

Montant	Date
9 058,36 €	05/04/2016
9 058,36 €	05/03/2016

### 8.3.5. Donor's details

From the « My Details » section, you can modify the information you got from the donor's donation(s). Click on modify to change or complete any field.



**Vos coordonnées**

**Données personnelles**

Hugh Conway  
Né(e) le 01/01/1900  
91 rue du cherche midi  
APT 85  
75000 Paris  
FRANCE  
Téléphone :  
Portable :

Oui, j'accepte de recevoir des appels téléphoniques et des SMS

**Mes emails**

comwaysal@raiser.eu

Ajouter une adresse Email

**Données personnelles**

**Titulaire du compte**

Civilité \* M Prénom \* ex. Bernard Hugh Nom \* ex. Dupond Conway Date de naissance \* ex. 18 janvier 1980 1 janvier 1900

Société ou raison sociale ex. Dupond SARL

**Mon adresse**

Adresse \* ex. 15 rue Jean Jaurès 91 rue du cherche midi Complément adresse ex. Bât. B APT 85

Code postal \* ex. 75008 75000 Ville \* ex. Paris Paris

Pays \* ex. France FRANCE

**Mes coordonnées téléphoniques**

Téléphone +33 (0)1 00 00 00 00 Portable +33 (0)6 00 00 00 00

Oui, j'accepte de recevoir des appels téléphoniques et des SMS

\* Champs obligatoires

Enregistrer

In the mail address section, you can click on add in order to modify the email address that will receive **Payment's** automatic emails. If you do, the donor will receive an email confirmation that he or she will have to validate so that the new email can be used as a replacement of the former one.

Please note that emails being important transaction IDs, they won't be deleted, and the donor will see the full list of the different emails he added. Les

### 8.3.6. Donor's payment history

The payment history section will look different from one donor's to another since it will be displayed according to his or her donation activities:

- if the donor made one-off donations, his payment history will be displayed in the orange section
- if the donor made regular donations, his payment history will be displayed in the green section
- if the donor made both regular and one-off donations, the two sections will appear.



### Votre historique

#### Financier

Montant	Date
200 €	08/04/2016

#### DONS RÉGULIERS

Prochain prélèvement : Mai 2016

Montant
9 058,36 € par mois

[Modifier](#) [Suspendre 4 mois](#)

[Mettre à jour votre carte bancaire](#)

Montant	Date
9 058,36 €	05/04/2016
9 058,36 €	05/03/2016

### 8.3.7. Regular donor's options

A regular donor has additional options you can choose to display from the personal space set up page:

- He can click on « modify » in order to change the amount of his regular gift.
- He can « suspend » for X months his regular donation (X being the number you set up)
- He can end permanently his recurring gift
- He can update his payment card information

### 8.3.8. Receipts download

If you chose to send receipts from **Payment**, and both set up and activated this option, your donors will be able to download them as many times as they wish, from the personal space page.

One-off Payment :



**Votre historique**

**Financier**

Montant	Date	
12 €	26/10/2015	<a href="#">Télécharger votre reçu fiscal # [redacted]</a>

**DONS RÉGULIERS**

Vous n'avez pas fait de dons réguliers.

The donor gets a receipt per transaction.

Regular payment:

The donor gets one receipt with all the regular donations he made accross the year.



**Votre historique**

**Financier**

2016 2015

Vous n'avez pas encore fait de don ponctuel!

**DONS RÉGULIERS**

Prochain prélèvement : Mai 2016

**Montant**

20 € par mois [Modifier](#) [Suspendre 2 mois](#)

[Mettre à jour votre carte bancaire](#)

Montant	Date	
20 €	05/12/2015	<a href="#">Télécharger votre reçu fiscal #WB02447</a>
20 €	05/11/2015	<a href="#">#WB02447 ↗</a>
20 €	05/10/2015	<a href="#">#WB02447 ↗</a>
20 €	05/09/2015	<a href="#">#WB02447 ↗</a>
20 €	05/08/2015	<a href="#">#WB02447 ↗</a>
20 €	05/07/2015	<a href="#">#WB02447 ↗</a>
20 €	05/06/2015	<a href="#">#WB02447 ↗</a>
20 €	05/05/2015	<a href="#">#WB02447 ↗</a>
20 €	05/04/2015	<a href="#">#WB02447 ↗</a>
20 €	05/03/2015	<a href="#">#WB02447 ↗</a>
20 €	05/02/2015	<a href="#">#WB02447 ↗</a>

## 9. Data export and synchronisation

When it comes to data exports in **Payment**, there are two solutions:

- The export button from the payment pages that generates a raw .csv document and that is only aimed at exporting small quantities of data.



– The notification/exports service from the « Default settings » menu for customized export (whatever the size), synchronization and alerts.

## Notifications / exports

[+ Add a notification](#)

ID	Notification	Next launch			
1	export hebdomadaires paiements en ligne validés	2017-07-26	<a href="#">Set up</a>	<a href="#">Duplicate</a>	<a href="#">Delete</a>
2	export don valides en ligne 2012-2017	Instant	<a href="#">Set up</a>	<a href="#">Duplicate</a>	<a href="#">Delete</a>
3	export dons valides en ligne	2017-07-27	<a href="#">Set up</a>	<a href="#">Duplicate</a>	<a href="#">Delete</a>
4	Weekly export - validated	2017-08-01	<a href="#">Set up</a>	<a href="#">Duplicate</a>	<a href="#">Delete</a>

The notifications/exports service is a powerful tool that will let you schedule automatic regular exports, synchronize **Payment** with your third service(s) (CRM, database), set instant alerts and export huge volumes of data. You will be able to choose the sending method (email, server) format (CSV, JSON, XML...) and the language ( UTF8, ISO etc.).

Contrary to the export button of the payments' section page, this service can differ the sending of your export, and send them when your payment platform's activity is at its lowest. The export button from the payments pages will ask you to use the notification and export service if it can't provide your .csv.

A notification will do for an export the same thing a campaign does for a form. It will let you set your export's parameters. If you want to create an export, click on « add a notification ».

### Creating an export

## Notifications / exports

[+ Add a notification](#)

Click on « add a notification ».



In parameters, set your export's main settings.

- Name of the notification

Choose the name of your notification, it will be displayed in the notification list. Choose a name that will make it easy to recognize the content of the export.

- Make one single export

This option lets you export once the data.

- Schedule a regular export

This option lets you programming an automatic regular sending of your export. You can choose its frequency and receive, for example, every Monday, the list of the validated gifts of the previous week.

- Email

Put the email address(es) that will receive the export here. In case of several email addresses, separate them with « ; » (without any space).

- Format



CSV: the notification will send your export attached as a CSV.

Free text: the notification will send you the data written directly into the body of the email.

▪ Name of exported files

Choose the name of your export file. Don't hesitate to use the « show shortcode » button underneath this field, so as to, for example, add automatically your export file's generation date. If you choose to schedule a regular export, you can select its frequency and its launching date. If you don't set an end date, the export will continue to be sent to you.

I would like to  make one single export  schedule a regular export

all the

starting from  until  ✕

Save your settings by clicking on any »save » button, anytime.

From the « filter » section, you can select which type of information you wish to export.

**FILTER**

Online payments > One-off payments	<input type="checkbox"/> validated <input type="checkbox"/> failed <input type="checkbox"/> cancelled
Online payments > Regular commitments	<input type="checkbox"/> validated <input type="checkbox"/> failed <input type="checkbox"/> suspended
Online payments > Regular payments	<input type="checkbox"/> validated <input type="checkbox"/> failed <input type="checkbox"/> cancelled
Authorizations > One-off payments	<input type="checkbox"/> waiting <input type="checkbox"/> validated <input type="checkbox"/> failed
Authorizations > Regular commitments	<input type="checkbox"/> waiting <input type="checkbox"/> validated <input type="checkbox"/> failed <input type="checkbox"/> suspended
Pledges > One-off payments	<input type="checkbox"/> waiting <input type="checkbox"/> validated
Pledges > Regular commitments	<input type="checkbox"/> waiting <input type="checkbox"/> validated <input type="checkbox"/> suspended
<input type="text" value=""/> From <input type="text" value=""/> (included) To <input type="text" value=""/> (included) ✕	
Campaigns	<input checked="" type="checkbox"/> All

Start by ticking the boxes corresponding to the payments/commitments you want to export. The notification displays all the payment canals available: online payments, authorizations, pledges.

The drop down menu list lets you choose the dates of the data you are interested in. You have the choice between: the creation/modification date of the gift, its validation/export\* date, refund export date\*, export generation date, or canceling date. For the scheduled regular export, don't put an end date if you wish to receive it without interruption.

*\*only works for gifts/payments synchronized with compatible third services.*

In « campaigns » choose between « all » and selecting one by one the campaigns you wish to export. If you wish to select individually the campaigns, un-tick « all ».

In the content section, you will be able to indicate precisely what you want to export, using shortcodes.





## CONTENT

### Body (for each donation/contact)

```
Email:[donator_email]
Civility:[donator_civility]
First-name:[donator_firstname]
Last-name:[donator_lastname]
Company:[donator_company]
Amount:[donation_amount_with_currency]
Frequency:[donation_frequency]
Origin code:[campaign_origin_code]
Campaign ID:[campaign_id]
Campaign type:[campaign_type]
```

Show shortcodes

- CSV

If you chose CSV and wish to get a spreadsheet, you will have to indicate the name of your columns, and the shortcode that corresponds to it. You get a default content every time you create a notification. Feel free to keep it, delete it or modify it.

In order to set your content up, you will have to do it one line at a time (1 line = A column) respecting this syntax:

name of your first column; [shortcode]

name of the second column; [shortcode]

name of the third column; [shortcode]...

If you want to integrate a shortcode, you can use the shortcode list available by clicking on the « show shortcodes » button.

Show shortcodes

Click on a shortcode to integrate it, like you do for emails and thank you pages. Don't forget to press enter after each shortcode. Don't add any space. If you want to export the donors' lastnames, firstnames, emails, donation dates and frequencies, your content will look like this:

Name:[donator\_lastname]

Firstname:[donator\_firstname]

Email:[donator\_email]

Date:[donation\_creation\_date]

Frequencies:[donation\_frequency]

Amount:[donation\_amount\_with\_currency]

- Free text

In order to send your export as simple text directly in the email's body, write directly your content, as you would



write any other type of content, and use shortcodes wherever you need them. Example

Hi ,

Here is your fundraising daily report. You will find yesterday's activity summary. [ date:d/m/Y]

- Total amount: [sum:[donation\_amount|div:100|number\_format:2:,:]] EUR
- Number of gifts: [count:[if][payment\_type][in]Visa,Mastercard[then]\*[/if]]
- Average gift amount: [average:[donation\_amount|div:100|number\_format:2:,:]] EUR
- Highest gift amount: [max: [donation\_amount|div:100|number\_format:2:,:]] EUR

Good work :) have a nice day!  
iRaiser team

Click on « save », the notification will give you useful information about the export you are going to generate: how many gifts will be exported, and how many you already got from your previous export notification if you chose to schedule a regular export.

The export will generate the following files :

- weekly.csv containing 367 gifts (0 gifts already exported)

## CONTENT

At the bottom of the page, in the preview section, the notification lets you see a sample of its content, the « ; » being the demarcations of the columns. You can pre-check your esport and be sure you set it properly.

Go back to the top of the notification's page to launch your export by clicking on the launch button:

### Notifications / exports

◀ Go back to list of notifications

Reset export **Launch export** Expert mode

Next launch : 2017-08-01

A processing animation will appear after clicking, its duration will be proportional to the quantity of data processed. If it can be generated at that moment, **Payment** will send it to you via email and you will be able to download it at the top of the notification's page from the « Downloadable files (most recent files) » section. Click on it and display the download history. If it is too heavy, **Payment** will simply delay the sending of your export and send it early in the following morning. If your export is a regular scheduled one, you will see the date of its next automatic launching.

#### DOWNLOADABLE FILES (MOST RECENT FILES) ↓

You will always find the most recently generated files. More specifically: files exported during the last 48 hours,



and the 10 last ones.

### Expert mode exports

Click on the expert mode button of a newly created notification, or click on the same button from an existing notification. Avoid switching back and force from a mode to another, especially if you have set expert parameters on your notification. Going back to classic mode will hide your expert features but it won't deactivate them.

Expert mode

The expert mode adds more options to your notification: instant sending, different format and sending methods... It is the mode you should use for your synchronizations.

You will find, in addition to the classic mode options:

- Type of the notification: instant

Will send you automatically the data you asked, as soon as/every time the operation occurs.

- Type of the notification: batch

Will send you your data by batch

- URL

Lets you indicate an URL for the data export sending.

- Charset

Lets you choose your export's charset. If you don't know which one to choose, keep UTF8.

- Authentication method

If you want to send your export on a secure server, you must enter here the identification information required.

- Method

Choose between Get / Post / Put or email

- Format

Choose your export format

- Trigger

Choose which action will trigger your export

- Origin

Choose the source of your the data you will export. If you pick one, you may exclude certain types of data from your export, for example, personal space data will only mostly consist of data from the shortcodes starting with sympathizer\_



- Data

Choose the type of data you will export.

- Sort data ( in your export)

Display the most recent or oldest data first

- Header and footer

Let's you integrate data in the header and/or the footer of the export. You can use some functions and variables, like in emails, thank you pages or ODT.

The functions available are: sum , count (number of), average, min, max.  
The syntax to build these functions is: [function:shortcode] .

Examples :

- [count:\*] will give you the number of gifts
- [sum:[donation\_amount|div:100]] will give you the total amount of the gifts.
- [average:[donation\_amount]] will give you the average gift amount, in cents
- [max: [donation\_creation\_date|date:H'i]] will give you the last gift's time
- [count:[if] [donation\_amount] [>] 8000 [then] \* [/if]] will give you the number of gifts that are higher than 80€, you can replace 80€by any other amount, be sure to use cents.
- [count:[if] [donation\_grid\_mode] [!=] free [then] \* [/if]] will give you the numbers of gifts made from the gift grid.

If your data synchronization requires technical synchronization, you can contact us on the [support](#), we will send you a quote.