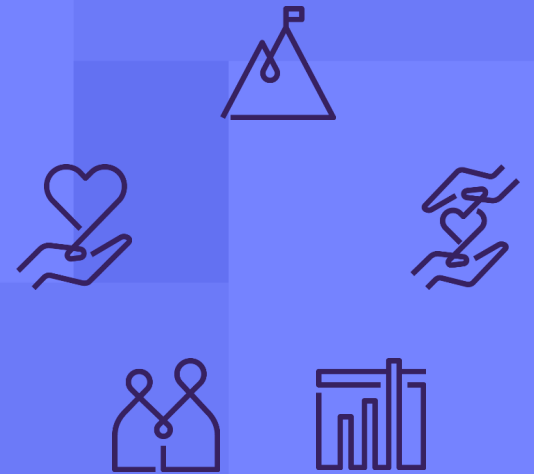


DONOR ENGAGEMENT

Collecting Contributions with Ease



Meet your Trainer...

Ryan Sauve

Training Specialist

Donor Engagement

EveryAction



Agenda

1. Introduction to Designations
2. Introduction to Gateways
3. Overview of Multiple Gateways
4. Q&A



Introduction to Designations

Designations: A designation represents a financial entity.



An organization typically only needs one Designation, though sometimes they may have more.



- Designations can be used to distinguish between c3 and c4 donations. For example, your organization may have a lobbying arm and a non-profit arm, which would need to manage their funds separately, so two Designations would be necessary.



- Contact Support if you need to set up additional Designations for your account.

Introduction to Gateways

Gateways: A Gateway is how contributions are processed.

The payment Gateway is essential because it links contributions made via EveryAction to your Designation.

Gateways are for required payment processing and must be set up prior to creating a Contribution Form.



Credit cards are the most common payment method.



To process **PayPal**, **Stripe**, or **Electronic Fund Transfer (EFT)** donations, you will need a separate Gateway set up for each.



Apple Pay requires a Paragon specific gateway.

Multiple Gateways

Multiple Gateways

You may choose to set up multiple gateways to support multiple payment methods.



For example, you can use a Bonterra Payments gateway to process credit cards, Automated Clearing House (ACH) and Electronic Fund Transfer (EFT) digital payments, and accept Apple Pay contributions. In addition, you may want to establish a PayPal gateway to allow donors to give through that account.


While you will need to set up additional Designations with Client Support, you can establish as many gateways as necessary from the sidebar. If you are an account administrator or digital user, you will have the option to add and manage gateways.

Determining the type of your Payment Gateway

Within EveryAction, there are three types of Payment Gateways your organizations may have, and this can be determined by what your setup looks like under “*Payment Gateways*” through the **Search for a Page** menu. Your options are:

- Bonterra Payments (recommended)
- Paragon
- Stripe


Payment gateways




Bonterra Payments rates:
3.50% + \$0.25 per Visa, Mastercard, and Discover transaction
4.10% + \$0.25 per American Express transaction
1% capped at \$9.99 for EFT payments
No monthly, set-up, or support fees!

[Request Bonterra Payments Gateway](#)
[Request Bonterra Payments Gateway \(TestMode\)](#)
 Add Default Test Data
[Verify Apple Pay Domains](#)

No Bonterra accounts
You can connect a Bonterra account by using the button above.


Accepted payment types for Bonterra gateways





PARAGON
payment solutions

[Request gateway](#)

No Paragon accounts
You can connect a Paragon account by using the button above.


Accepted payment types for Paragon gateways




stripe

[Connect account](#)

No Stripe accounts
You can connect a Stripe account by using the button above.

Accepted payment types for Stripe gateways


Apple Pay with Bonterra Payments

If your Bonterra Payments account was created after February 15th 2024, Apple Pay is already directly integrated in your Payment Gateway setup.

If this account was created *prior*, an independent email will need to be sent to payments@bonterratech.com to have this added to your account.

Please note that when hosting or embedding contribution forms on your own site, there is a separate process required to verify your site's domain, directly with Apple, as a fraud prevention measurement.



Enabling PayPal in EveryAction

If your organization would like to use PayPal to accept contributions, you will need to set up your business account with PayPal and then work with Client Services to set up your Gateway to accept these payments.



Things to remember while setting up PayPal in EveryAction:

- You will need to begin by requesting a validated Business Account from PayPal, then working with PayPal to request the ability to process reference transactions (tokenization).
- Once your account is established (1-2 business days), you can request a PayPal access token.
- This token will be emailed to EveryAction Client Services, and we will add the payment method to your chosen Gateway.

Using Stripe in EveryAction

With a Stripe payment processing account, you will be able to set up a gateway you can use with your Online Actions forms to process your online contributions or ticketed event purchases.

Stripe is typically the payment processor we use to support international payments and contributions.

Things to remember while setting up Stripe in EveryAction:

- You will need to have an established Stripe account.
- Connecting your Stripe account is simple following the Payment Gateways option from the EveryAction Sidebar.
- Once set up, you can select your Designation and complete the process, all within EveryAction.
- You can also accept donations in non-us currency by following [this linked help document](#).



Q & A



Additional Resources

Support

- Contact your System Administrator
- Email help@EveryAction.com
- Call (202) 370-8050
- Submit a Support Request Ticket from the Main Menu of the EveryAction CRM



Help Center Resources

- [Requesting a Paragon Gateway](#)
- [Setting up Apple Pay in EveryAction](#)
- [Enabling PayPal in EveryAction](#)
- [Setting Up Stripe in EveryAction](#)



Additional Training

- Bonterra Academy:
<https://help.everyaction.com/s/article/Bonterra-Academy-Self-Signup>
- Foundational Webinar Series
- Upcoming initiatives
- Videos in Bonterra Academy



Thank You for Attending!

