

Setting Up Bonterra Pay in EveryAction



Agenda

Accessing Payment Gateways

What You'll Need

The Application Process

Next Steps

Let's get ready to roll!

Accessing Payment Gateways in EveryAction

Log in to
EveryAction

Locate and Access
the Payment
Gateways Menu

Choose "Request
Gateway"

What You'll Need: A Primer


1. **Organizational Information**
 - I. **Tax ID Number**
 - II. **Legal Business Name**
 - III. **Business Address**
 - IV. **Business Number & Website**
2. **Personal Info for Account Holder**
 - I. **Legal Name**
 - II. **Personal Address**
 - III. **Email**
 - IV. **Job Title**
 - V. **DOB**
 - VI. **Social Security Number**
3. **Bank Deposit Routing and Account Number**



Requesting Your Gateway

Home / Payment gateways

Payment Gateways







Verify domain **Request gateway**

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 ACH payments.
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NADO (Main)


ACTIVE

Designation name	NADO (Demo) Designation	More info Edit ▼
Active payment types	     	
CVV ⓘ	Enabled	
Account Updater ⓘ	Enabled ⓘ	
AVS Level	Medium	
Reports	Transactions Report Payout Report	
Fees	Visa, Mastercard, Discover: 3.50% + \$0.25 American Express: 4.10% + \$0.25	

- Search for a page
- Home
- Main Menu
- Fundraising Management
- Volunteer Management
- CONTACTS
 - Create a List
 - My Folders
 - My List (0 Contacts)
 - Quick Look Up
- ENGAGEMENT
 - Ad Audiences
 - Automation
 - Event Attendee Check-In
 - Event List
 - Event Participant List
 - Event Requests (0)
 - Mobile Messaging
 - Online Actions
 - Stories
 - Targeted Email
- FUNDRAISING
 - Call Time List
 - Direct Response Plans
 - Financial Batch Manager
 - Fundraising Optimization Guide
 - Membership Management
 - Online Actions auto01
 - Online Actions dev01
 - Online Actions dev02
 - Online Actions dev03
 - Online Actions dev04
 - Online Actions dev05
 - Online Actions dev06
 - Online Actions dev07

Home / Payment gateways

Payment Gateways




[Verify domain](#)
[Request gateway](#)
[Request gateway \(TestMode\)](#)
 Add Default Test Data


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[Connect account](#)

No Stripe accounts

You can connect a Stripe account by using the button above.

Accepted payment types for Stripe gateways



Accessing Payment Gateways in EveryAction

Log in to
EveryAction

Locate and Access
the Payment
Gateways Menu

Choose "Request
Gateway"

**If any users here *were unable* to access the Payment Gateways menu,
please type an emoji in chat or raise your hand.**

What's next?

With a completed gateway, we can:

The screenshot shows the 'everyaction Demo' interface. The top navigation bar includes a search bar, user profile 'Daniel Mathias', and a 'Relaunch to update' button. The main content area is divided into several sections:

- MAIN MENU:** A vertical sidebar on the left with categories like Home, Fundraising Management, Volunteer Management, CONTACTS, ENGAGEMENT, and FUNDRAISING.
- Welcome Daniel:** A central header with a search bar and 'Help Wiki' link.
- Account Requests:** A list of requests with counts (e.g., 0, 0, 0, 0, 1, 0, 1, 1).
- Quick Look Up:** A section with 'Quick Look Up' and 'Quick Add New Contact' buttons.
- Load Data:** A section with options like 'Quick mark', 'Script View', 'Grid View', 'Form View', 'Run Bulk Uploads', and 'Upload Finder File'.
- Lists:** A section with 'Create A New List', 'Go To My List (765 Contacts)', and 'View My Folders'.
- Disclosure:** A section with 'Cycles & Limits'.
- Canvassing:** A section with 'Canvass Results', 'Turfs', 'View Map Region Refresh Queue', and 'Street Team Efforts'.
- Reporting & Data Analysis:** A section with 'National Dashboard', 'Analytics Dashboards', and 'Report Manager'.
- Administrative Menu:** A section with 'Settings and Preferences', 'State Updates', 'Mail Merge Templates', 'Reports - Forms - Labels', 'MiniVAN', 'Exports', 'Letters', 'Phone Services', 'Users - Committees', 'Codes - Questions - Scripts', 'Contributions', 'Membership', 'Volunteers - Events - Locations - Titles', 'Monitor the System', 'System Performance', 'Distributed Contacts', 'Integrations', 'Advanced', 'Public Websites', and 'Soft Reporting'.

The screenshot shows the 'onlineactions' dashboard. The top navigation bar includes 'Dashboard', 'Pages', 'Templates', 'Themes', 'Reusables', 'Redirects', and 'Settings'. The main content area is divided into several sections:

- Form Performance:** A section with four metrics: Views (4), Submissions (2), Conv. Rate (50%), and Amt. Raised (\$41.90).
- Create New Form:** A green button with a dropdown arrow.
- Drafts:** A section with 'There are no drafts in progress.' and a note: 'Please create a new page from scratch, a template or existing page.'
- Form Overview:** A table with columns: Name, Views, Submissions, Conv. Rate, Amt. Raised, Type. The table lists various forms and their performance metrics.

Name	Views	Submissions	Conv. Rate	Amt. Raised	Type
Fall Gala 2024 ● Deactivated by System User Oct 31, 2024 3:45 AM	1	1	100%	\$259.00	TICKETED EVENT
Fall Gala ● Deactivated by System User Oct 28, 2024 3:45 AM	1	1	100%	\$36.48	TICKETED EVENT
Contribution Form Q4 ● Published by Daniel Mathias Oct 25, 2024 5:03 PM	6	3	50%	\$62.85	CONTRIBUTION
Story Collection ● Published by Daniel Mathias Oct 21, 2024 4:23 PM	1	1	100%	-	STORY COLLECTION
Autumn Festival 10/11/2024 750024495 ● Deactivated by System User Oct 15, 2024 3:45 AM	1	0	0%	-	EVENT SIGNUP
Dog Walkers Recruitment Event Fall 2024 10/1/2024 750... ● Deactivated by System User Oct 8, 2024 3:45 AM	1	1	100%	-	EVENT SIGNUP
Reform Dog Policies Now! ● Published by Daniel Mathias Sep 26, 2024 3:38 PM	2	2	100%	-	ADVOCACY
NADO 2024 Q3 Giving Page ● Published by Daniel Mathias Sep 24, 2024 3:38 PM	7	3	43%	\$191.62	CONTRIBUTION
Big Bash ● Deactivated by Daniel Mathias Aug 6, 2024 5:06 PM	1	1	100%	\$40.00	TICKETED EVENT
Big Giving Days 2024 ● Updated by Daniel Mathias Aug 6, 2024 4:49 PM Unpublished changes	3	1	33%	-	PEER-TO-PEER

Additional Resources

Additional Learning Opportunities

Currently, EveryAction has an expansive (and growing!) library of webinars available to review tasks like:

- **Creating Online Actions**
- **Sending Targeted Emails**
- **Adding New Users**
- **Creating Contributions**
- **Configuring Your Codes**
- **And much more!**

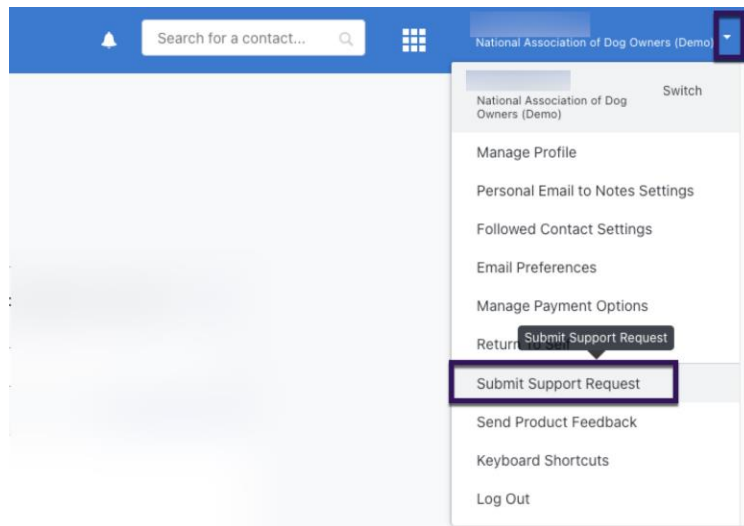


Build confidence and knowledge
in our software.

<https://www.bonterratech.com/training#everyaction>

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



Q & A

- Ask questions about functionality covered in this training
- Ask real-life application questions
- Or sign off and we will see you in the next training!



Thank you for attending!

We hope to see you
in future trainings.