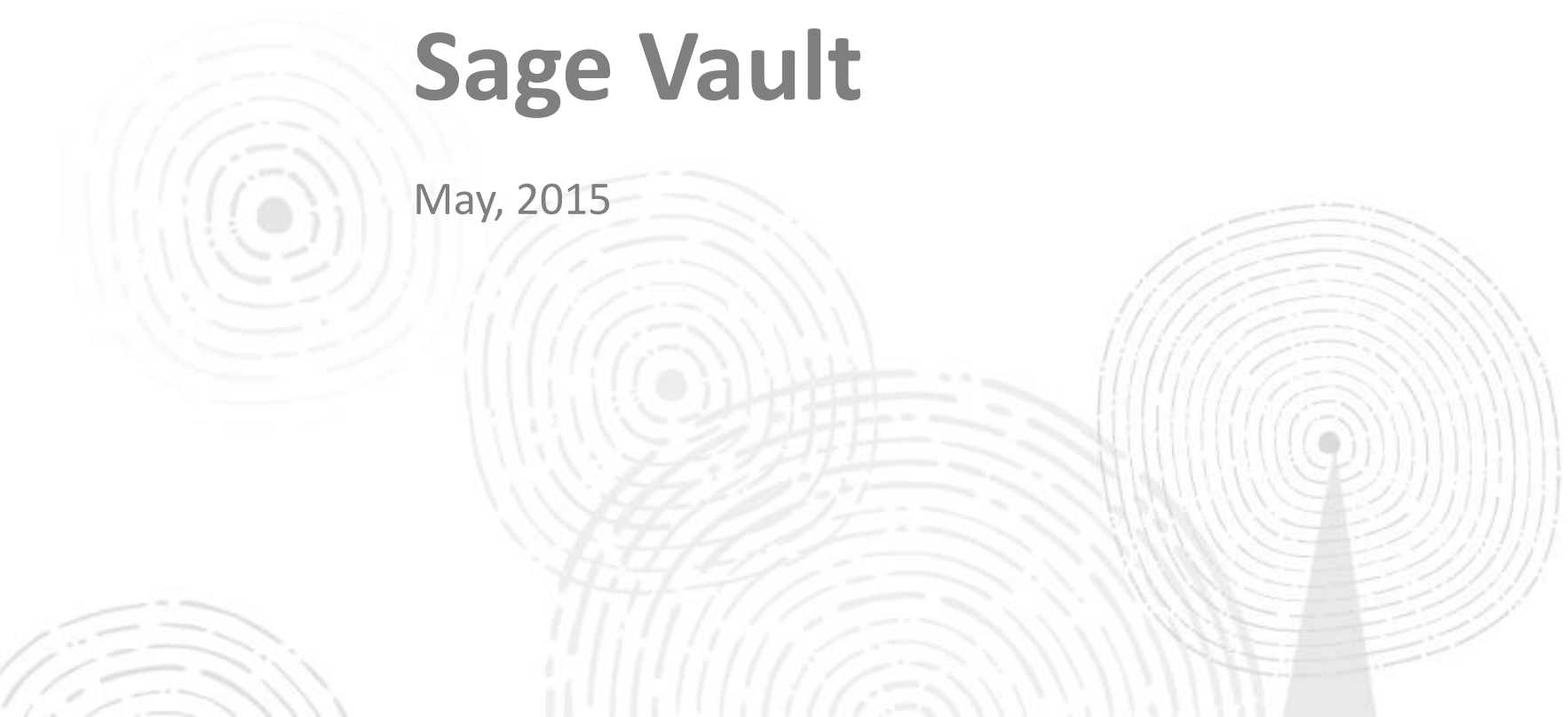




NPR DS Marketing Forms powered by Springboard Sage Vault

May, 2015



Agenda

- Quick Pledge Migration: Where You Should Be
- Authorize Only Processing vs. Authorize & Capture
- Testing Payments
- Testing Reports
- Launch Process

Where You Should Be Now

- Logo Uploaded to your Marketing Forms Account
- Cloned one or more forms
- Added Premium to the system.
- Reviewed forms & alerted NPR DS if additional fields are needed.
- Email dsaia@npr.org if you need help with any of these steps!

****Remember: Quick Pledge will retire on 7/31/15****

Authorize Only Processing

Form Submit

- Donor submits form
- Credit Card sent to gateway, ***not processed***.

Authorization

- Gateway confirms card is valid
- Sends back Token/GUID needed for processing

Processing & Reporting

- Token/GUID downloaded in Donation Export Report
- Cards processed via your database when Token/GUIDs uploaded

Authorize & Capture Processing

Form Submit

- Donor submits form
- Credit Card details are sent to gateway
- Recurring donation schedule created in Marketing Forms for sustaining pledges

Processing

- Gateway instructs payment processor to charge card
- Gateway returns status of payment (received, rejected)

Reporting

- Donation Export Report includes record of pledge & payment status. *No Token/GUID included.*
- Upload to your database to track payments received.

Pros/Cons

■ Authorize Only

- Pros: Manage payment processing yourself via your donor database
- Cons: You will not be able to use our Member Profile center which will allow donors to manage their own sustaining gifts & update their own credit card. *(Still in development)*

■ Authorize and Capture

- Pros: Money captured immediately; sustaining pledges collected automatically; you will be able to use Member Profile center when ready.
- Cons: You cannot manage sustaining gifts via your database (Recurring payment schedule is managed in Marketing Forms).

Changes in Marketing Forms with Authorize Only

- Two fields added to Donation Export Report:
 - Remote_ID – Token/GUID from payment gateway ONLY for payments processed using Authorize Only method. Blank on other payments
 - Remote_Status – Always contains “authorize” for Authorize Only payments.
- Recurring Donation Set not created for Authorize Only Pledges
 - When Donor creates a sustaining pledge, monthly payment authorization sent to gateway & donation export report indicates donor created monthly donation.
 - **You are responsible for processing each monthly payment through your database (*same as Quick Pledge*)**

Test Payment Process

1) We will alert you when Authorize-Only is active on your form this week (check the payment gateway on your form is set to “Sage-Credit Card (Auth Only)”

2) Open up a browser and go to your default form:
<https://donate.nprstations.org/yourstationID>
(Remain LOGGED OUT for payment test)

3) Make at least two pledges with live credit card

- a. One-time \$10 (or minimum) payment
- b. \$5 (or minimum) monthly payment

Test Payment Process

3) Log in to your Marketing Forms Account & Download the Donation Export Report for the date of your test pledges

4) Confirm you see IDs in the “Remote_ID” field

5) Import your Donation Export Report into your database, and process the payments

Confirm:

- ✓ No errors on the form; you see the confirmation page
- ✓ You receive two confirmation emails
- ✓ You are able to process the payments via your database

Test import of Donation Export

1) Go to REPORTS tab and select Donation Export Report:

<https://donate.nprstations.org/yourstationID/springboard/reports/>

2) Download the CSV file (You can filter only “payment_received”, or “bill me”)

- You can either choose to open the file as a CSV file or an Excel file to test an import into our donor database

- If you open the file in Excel to review, check the zip code and other fields that may have a leading zero (0) because Excel strips them out.

- Review file formats here:

- <http://nrds.screenstepslive.com/s/4375/m/13812/l/259880-marketing-forms-step-5-reporting>

Launch Process

- Your forms are ready to go live once you've confirmed:
 - NPR DS has set your default form to load at `donate.nprstations.org/YOURNAME`
 - You have placed successful test payments, that you were able to fully process via your database.
- Complete form to verify you are ready to go
- Sara or Diane will double check your configuration & confirm all is good to go
- Update your support links to point to your new form
- NPR DS will re-direct Quick Pledge URLs to new forms

Next Steps

- We will alert you ***this week*** when your form is ready to test
- Submit Test Payments
- Download Donation Export Report & Process Payments via your database
- Confirm you are ready to go live
- Update your support links
- Contact us with questions:
 - Sara: sterpeny@npr.org; 617-622-5413
 - Diane: dsaia@npr.org; 617-622-5426

****Remember: Quick Pledge will retire on 7/31/15****