

# Configuring PayPal with Common Ground Fundraising

## Overview

This guide describes how to configure both Common Ground and PayPal so your organization can use Common Ground Fundraising (CGF).

Please review this entire document before you start configuring CGF to fully understand the steps that are required to complete your configuration.

- [Step 1: Setting Up Your Paypal Account](#)
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## Step 1: Setting Up Your PayPal Account

Convio and PayPal advise you to start setting up your account as soon as possible. Your organization could complete the process within a day, or it could take longer depending on the PayPal information gathering process.

To use CGF, your organization must have a PayPal Web Payments Pro account. A dedicated team at PayPal is trained on the CGF requirements and can help you with setup. You can use an existing PayPal Web Payments Pro account, upgrade a standard PayPal account or create a new account to use with Common Ground.

**Note:** Common Ground **strongly recommends** you use a dedicated email address for your organization's PayPal account that is not associated with a specific person. For example, use an address like "paypal@yourorg.org" instead of "bob.smith@yourorg.org." Common Ground uses the primary email address associated with your PayPal account as an identifier for all API requests. If the address changes and you do not notify Convio, all payment processing through Common Ground Fundraising breaks until the address is updated in Common Ground.

Complete the following steps to initiate contact with the PayPal team that is dedicated to working on Common Ground-related issues. The PayPal team will ensure you have a correctly configured account.

1. Fill out and submit the form online at [https://www.cgupgrade.com/cgf/paypal\\_form.php](https://www.cgupgrade.com/cgf/paypal_form.php).
2. After you submit your form, a PayPal representative will contact you within 2 business days to help ensure your account is set up properly and ready for Common Ground integration.

### Tips for PayPal Account Configuration

As part of the PayPal account setup process, ensure the following tasks are complete:

- Confirm your email address with PayPal.
- Verify your bank account with PayPal.
- Send copies to PayPal of your government-issued 501(c)(3) documentation, bank statement and a voided check.
- Accept the PayPal Web Payments Pro billing agreement.
- Send the PayPal Due Diligence team any additional information they request to determine your business model and mission statement.

While the setup of your PayPal account is underway, you can proceed with Steps 2, 3 and 4.

## Step 2: Upgrading to Common Ground 2011b

Refer to [Upgrading to Common Ground 2011b](#) for full and complete instructions about completing the upgrade. You **must** complete the **entire** upgrade procedure to version 2011b before proceeding to the next step in configuring CGF.

If you are already using 2011b, you may skip this step. To check your current version of Common Ground, look under the Quick Help section of the left sidebar in Common Ground. The current version number is displayed at the bottom of the section.

## Step 3: Specifying a Public URL

You need to specify the name that will appear as part of the URL for your organization's donation forms. Donors might not need to type this URL directly, but many will see it when they are using your online form to make a donation. Therefore, it is helpful to pick a

name that identifies your organization.

1. From the drop-down menu in the upper right corner of Common Ground, select **Common Ground Fundraising**.
2. Click the **Online Configuration** tab to display the Online Configuration Center. You will see a list of configuration options that must be set up correctly before you can work with online donations. Options that have been set up are marked with a green checkmark. Options that have not yet been set up are marked with red exclamation point, as shown in the following screenshot.

Common Ground Online Help for this Page

## Online Configuration Center

The Online Configuration Center is where you configure general Common Ground Online Fundraising settings so you can start collecting contacts, donations, and event registrations online.

✔ Your organization is using Common Ground Online **Unlimited**. This means that you have full access to all of the features available in Common Ground Online Fundraising.

Have questions about some of the features available? Check out the [Resource Center](#) for the information about publishing forms, creating custom design templates, and reviewing form results.

### Online Form Settings

General online form settings will need to be set before you begin using Common Ground Online. Some of these settings will only be set once. [View Online Form Settings>](#)

Current Status: **Configured** ✔

### Contact Matching Settings

You can fine-tune the way that Common Ground Online Fundraising matches online contacts with the contacts you already have in Common Ground. [Edit Contact Matching Settings>](#)

Current Status: **Configured** ✔

### Setup Your Integration User

The Integration User is the way that Common Ground Online Fundraising talks to Common Ground. This only needs to be setup once. [Setup Your Integration User>](#)

Current Status: **Not Configured** !

### Merchant Account Settings

In order to process donations, you'll need to integrate Common Ground Online with your merchant account. [Edit Merchant Account Settings>](#)

Current Status: **Not Configured** !

**Note:** If you do not see the configuration page but instead are viewing a promotion for Common Ground Fundraising, your organization's license is not activated for the online donations feature. Contact Convio immediately.

3. Click the **Online Form Settings** link to configure the default path for your online forms. All your organization's online forms will be stored under one path:  
**https://secure.commonground.convio.com/orgname/formname/index.html**  
where *orgname* is the path name you will select on the Online Options page.
4. In the **OrgName** field, enter the *orgname* part of the path name to use for your organization. For example, enter **gabriel** if you want your path to read <https://secure.commonground.convio.com/gabriel/formname/index.html>, as shown in the following screenshot.

**Note:** Select the path name carefully since it cannot be changed. Ideally, the *orgname* text should be no longer than 10 characters, and it is helpful to use an abbreviation that is representative of your organization's name.

## Online Options

**Path Name Not Configured**  
Enter the path you want your forms to reside under.

### Set Path Name

Each online form will have its own unique URL, but all of your organization's forms will reside within a single primary path, as specified by the OrgName entered here  
(ex. <https://secure.commonground-test.convio.com/orgname/formname/index.html>)

OrgName

(OrgName should be no more than 10 characters, and should be an abbreviation that is representative of your organization's name. This cannot be changed once it has been set.)

5. Any information you enter in the **Default Form Values** section will automatically populate the corresponding fields in your online forms. You can always override these values on a specific form if necessary.
6. Click the **Save** button to return to the Online Configuration page. When you return to the Online Configuration page, a green checkmark should display next to **Online Form Settings**.

## Step 4: Verifying User Settings

## Merchant Account Access

To proceed with PayPal onboarding, you must ensure that Merchant Account Access is enabled on your Common Ground user profile. Users with Merchant Account Access can:

- Complete PayPal onboarding.
- Process refunds for donations and event registrations.
- Modify recurring gift profiles.

Complete the following steps to enable Merchant Account Access.

1. Click your username at the top of any Common Ground page and from the drop-down menu, select **Setup**.
2. From the left sidebar, click **Manage Users**, and after it expands, **Users**. The Users page for your organization displays.
3. Click the **Edit** link next to your user account. The User edit page for your account displays.
4. Scroll down to the Online Permissions section of the page and place a checkmark in the **Merchant Account Access** checkbox.
5. Click the **Save** button to save your update to the User account.

## Integration User Configuration

Your instance of Common Ground must include an integration user, a Common Ground user that owns new donations, event registrations, and contact records created in Common Ground Fundraising, and imports processed donations into Common Ground during the online donation process. The integration user must have an Integration User profile and must be assigned a Common Ground license.

Complete the following steps to create the integration user.

1. Log in to Common Ground as a System Administrator.
2. From the username pull-down menu at the top of the page, select **Setup**.
3. In the left column, click **Manage Users** to expand the list of options.
4. Click **Users** to display the Users page.
5. Click the **New User** button to display the New User page.
6. Create a new user with the following settings:
  - **First Name** = CGF
  - **Last Name** = Integration
  - **Alias** = cgfi
  - **Email** = Email address of your Common Ground Primary Administrator

**Note:** Be aware that the recipient of this email address will receive the generated password to use for configuration, as well as messages whenever problems occur with importing donations from PayPal, and select the appropriate email address accordingly.

- **Username** = cgfi@orgname.org (replacing "orgname" with your organization's actual name)
- **Community Nickname** = cgfi
- **User License:** Salesforce
- **Profile** = Integration User

**Note:** If a profile called Integration User does not exist, you must create one, as detailed in the [Upgrading to Common Ground 2011b](#) instructions.

7. Scroll down to the Online Permissions section and place a checkmark in the **Stuck Transaction Notifications** checkbox. This enables the email address associated with the integration user to receive a message whenever a problem occurs with importing donations from PayPal.
8. Scroll down to the Salesforce.com Newsletter Settings section and remove the checkmarks from the two newsletter-related checkboxes. Place a checkmark in the **Generate new password and notify user immediately** checkbox.
9. Click the **Save** button. The email address you specified will receive a message with a generated password. Open the email and follow the directions to change the password.

**Important: Keep track of the username and password since you will need them when you add the integration user to the online fundraising feature.**

10. After you change your integration user password, log out of Common Ground.

Complete the following steps to license the new integration user.

1. Log in with your own username and password to continue the configuration process.
2. In the left column under App Setup, click **View Installed Packages**. The **Convio Common Ground** listing should appear in the Installed Packages section, as shown in the following screenshot.

Installed Packages									
Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date
Uninstall   Manage Licenses	Convio Common Ground	Convio, Inc.	4.2	cx	Active	10	7	12/31/2010	10/19/2010 2:18 PM
Description Convio Common Ground constituent relationship management system.									

  

Data from Uninstalled Packages
No uninstalled package data archives

4. Click the **Manage Licenses** link next to the Convio Common Ground package name to display the license page for that package.
5. Click the **Add Users** button. From the list of available users, place a checkmark next to **Integration, CGF**. Click the **Add** button. The integration user should now appear in the list of licensed users.

Complete the following steps to add the new integration user to CGF online integration.

1. From the drop-down menu in the upper right corner of Common Ground, select **Common Ground Fundraising**.
2. Click the **Online Configuration** tab to display the Online Configuration Center.
3. Click the **Setup Your Integration User** link to display the Online Integration User Setup page.
4. Enter the new integration user's Common Ground username and the password, as shown in the following screenshot.

When you return to the Online Configuration Center, the current status of **Setup Your Integration User** should display as **Configured** with a green checkmark.

## Step 5: Configuring PayPal Onboarding

Before you begin this step, you must have your PayPal Web Payments Pro account set up correctly, as described in Step 1. PayPal onboarding will tie the PayPal account to your Common Ground instance and grant permission to Convio to process payments on your behalf.

1. From the drop-down menu in the upper right corner of Common Ground, select **Common Ground Fundraising**.
2. Click the **Online Configuration** tab to display the Online Configuration Center.
3. From the Merchant Account Settings section, click **Edit Merchant Account Settings**. The PayPal Merchant Account page displays.
4. Click the **Setup PayPal Account** link to start the PayPal onboarding process. The Get Started with PayPal and Convio web page should display in your web browser, as shown in the following screenshot.

**Get Started With PayPal and Convio Now** Secure Transaction

PayPal Website Payments Pro

**The low-cost, all-in-one payment processing solution.**

**Here's what you need to get started**

- **Set up an account**  
Use your existing account or create a new one
- **Provide company information**  
Social Security number of owner or federal tax I.D. number  
Sales data (e.g., average monthly volume)
- **Review your company profile**  
Confirm your selection of products and services
- **Provide your credit card information**  
We'll bill you automatically every month

**Here's what you can do**

- **Accept all major credit cards** including Visa, MasterCard, Amex, and Discover.
- **Enjoy one relationship** for your gateway and internet merchant account.
- Use automatic built-in fraud filters to help **limit your liability.**
- **Save up to 16%** over the total processing costs of our closest competitors.\*

\*In Q2 2008, PayPal audited the actual processing fees of 100 random merchants and compared PayPal's fees to the actual fees charged by these other online credit card processors. The results were compiled by a side-by-side comparison to the fees PayPal would have charged for the exact same number and types of transactions as well as the exact same total payment volume.

**New to PayPal?**

Accept all payment types for the same low price — with industry-leading security.

**Already Using PayPal?**

Log in here to use the all-in-one payment solution. If you already have a Personal or Premier account, you'll be asked to upgrade to a Business account.

Email:

Password:

Forgot [email address](#) or [password](#)?

5. Log in with your PayPal credentials under the Already Using PayPal? section. The API Permission screen displays.
6. In order for CGF to work, you must give Convio permission to process payments on your organization's behalf. Click the **I Agree** button, as shown in the following screenshot.

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**API Permission**

By clicking "I Agree", I am permitting Convio to contact PayPal and process payments on my behalf.

After you click the **I Agree** button, PayPal will display a status screen that shows you the remainder of steps you must take with PayPal to complete their onboarding process.

## Adding API Permissions

In order to process recurring gifts correctly, you **must** enable the following API permission in PayPal.

**Note:** Be aware that the specific wording of options and headings in API-related PayPal pages may vary slightly depending on your specific PayPal account.

Complete the following steps to add API permissions to your CGF configuration.

1. From the PayPal website, log in to your PayPal account if you are not logged in already.
2. Click the My Account tab, then click **Profile**.
3. Under the Account Information column, click **Request API Credentials** if it appears as an option. If not, click **API Access**. In either case, a Request API Credentials/Access page displays.
4. You will be prompted with two option columns. Under **Option 1**, click **Set up PayPal API credentials and permissions** or something similar. The API Access/Permissions page displays.
5. From the Edit or Remove API Permission page, click the **Edit Third Party** button next to **commonground-paypal\_api1.convio.com**. You may be required to re-enter your PayPal password. The Edit Third Party Permissions page displays.
6. Some permissions are already selected. Do not remove existing checkmarks from checkboxes. In the Available Permissions section, place a checkmark in the **Charge an existing customer based on a prior transaction** checkbox, as shown in the following screenshot.

**Granted Permissions**

- Process your customers credit or debit card payments. [What's this?](#)
- Use Express Checkout to process payments. [What's this?](#)
- Authorize and capture your PayPal transactions. [What's this?](#)
- Search your transactions for items that match specific criteria and display the results. [What's this?](#)
- Issue a refund for a specific transaction. [What's this?](#)
- Obtain information about a single transaction. [What's this?](#)
- Create and manage Recurring Payments. [What's this?](#)
- Obtain authorization for pre-approved payments and initiate pre-approved transactions. [What's this?](#)

**Available Permissions**

For more information about all of the permissions available, see [Third Party Definitions](#).

- Create and manage PayPal payment buttons on your website.
- Obtain your PayPal account balance.
- Charge an existing customer based on a prior transaction.
- Accept or deny a pending transaction.
- Issue a refund for any prior transaction.

7. At the bottom of the page, click the **Save** button.

## Configuring Instant Payment Notification (IPN)

Instant Payment Notification (IPN) must be enabled in PayPal in order for payments to be processed successfully in Common Ground. Complete the following steps to configure IPN settings.

1. From the PayPal website, click the My Account tab, then click **Profile**.
2. Under the Selling Preference column, click the **Instant Payment Notification Preferences** link.
3. From the Instant Payment Notification page, click the **Choose IPN Settings** button to display the Edit Instant Payment Notification (IPN) Settings page.
4. Enter the **Notification URL**: <https://ws.commonground.convio.com/paypal/ipn2>, as shown in the following screenshot. Make sure the **Receive IPN messages (Enabled)** radio button is selected. Click the **Save** button.

**Edit Instant Payment Notification (IPN) settings** [Back to My Profile](#)

PayPal sends IPN messages to the URL that you specify below.

To start receiving IPN messages, enter the notification URL and select **Receive IPN messages** below. To temporarily stop receiving IPN messages, select **Do not receive IPN messages** below. PayPal continues to generate and store IPN messages until you select **Receive IPN messages** again (or turn off IPN).

Notification URL

IPN messages

Receive IPN messages (Enabled)

Do not receive IPN messages (Disabled)

The PayPal onboarding process is complete. Return to the Online Configuration page in Common Ground, and refresh your screen to view the PayPal Merchant status. When the account is configured, a green checkmark will appear next to **PayPal Merchant**. Click the **PayPal Merchant** link to view the status of your onboarding process, as shown in the following screenshot. This is useful to track while you are gathering and submitting external information for PayPal during the approval process.

Online Configuration  
**PayPal Merchant Account**

 **Merchant Account Configured**  
 Your PayPal merchant account has been configured.

**Status Details**

Account:	admin@gabriel.org
Type	PayPal
Overall Status	COMPLETED
Onboarding Last Update	Mon Sep 27 22:20:50 GMT 2010
PayPal Onboarding Status:	COMPLETED
IPN Status:	RECEIVING
Vetting:	Approved
Bank Acct:	Confirmed
Email:	Confirmed
Donation/Refund Permissions:	ALL
Recurring Payment Permissions:	ALL
Onboarding Settings:	Configured <a href="#">Reset Merchant Account Information</a>

Your **Overall Status** will be one of the following options:

- **Started** – This indicates that the onboarding process has been started.
- **Pending** – This indicates that you have created a PayPal account for which you've given Convio access.
- **Completed** – The onboarding process is complete and you are ready to build and publish online donation forms.

The **IPN Status** field will change from **Unknown** to **Receiving** after your organization's first online payment through Common Ground Fundraising is processed.

Tips for PayPal onboarding:

- If you have sales questions about setting up new PayPal services, contact a PayPal Product Specialist at (866) 365-5196.
- If you have customer service questions about your existing PayPal account, contact PayPal Support at (888) 221-1161.

After you have completed PayPal onboarding, you are ready to publish online forms.

## Step 6: Defining Contact Matching Rules

Common Ground will attempt to match anyone who donates through an online form to a contact record in your organization's Common Ground database by using contact matching rules, or integration rules. The contact matching rules you select when configuring your Common Ground Fundraising settings determine how strictly or loosely the match will be performed. If no match is found, a new [household contact](#) is created for the donor.

Complete the following steps to configure contact matching rules:

1. From the Online Configuration Center, click the **Edit Contact Matching Settings** link to display the Configure Integration Rules Page. You can verify or change the criteria the online donations feature uses to match online donors with existing donors in your Common Ground database, as shown in the following screenshot.

Online Configuration [Help for this Page](#)

## Configure Online Integration Rules

**Matching Criteria**

**Auto Promote**  
If Auto Promote is enabled, matched Organization Contacts will be automatically promoted to Household Contacts.

**Enable Auto Promote** *(recommended)*

**Casual Name Matching**  
When Common Ground Online is evaluating potential duplicates from online contacts, it compares the first names of potential duplicates. If you enable Casual Name Matching, Common Ground Online will compare both formal names ("William") with associated casual names ("Bill"). Note: You can manage your list of Casual Names below.

**Enable Casual Name Matching** *(recommended)*

**Strict Email Rules**  
When strict email matching is enforced, existing contacts in Common Ground will only be matched if they have an email, and it matches the online information. This may result in more duplicate records, but will ensure accounts are not hijacked.

**Enable Strict Email Rules** *(recommended)*

**Household Matching**  
If Household Matching is enabled, Common Ground Online will attempt to add contacts with the same last name and address but no other matching information to the same household. Otherwise, contacts with no potential matches will automatically be added to new household accounts.

**Enable Household Matching** *(recommended)*

2. In the **Matching Criteria** section of the page, you have four options for finding matching contacts in Common Ground:
  - **Auto Promote** -- If this option is enabled, when an online donor matches with an Organization Contact, that contact is promoted to a Household Contact.
  - **Casual Name Matching** -- When Common Ground evaluates potential duplicates from online contacts, it compares the first names of potential duplicates. If this option is enabled, Common Ground compares formal names with associated casual names -- for example, "William" will be compared with "Bill" and "Billy." You can edit the **Casual (Informal) Name List** under the Matching Criteria section to determine the casual names you want to include in the matching process.
  - **Strict Email Rules** -- If this option is enabled, existing contacts in Common Ground will be matched only if they have an email address that matches their online information. This option may result in more duplicate records, but will ensure accounts are not hijacked.
  - **Household Matching** -- If this option is enabled, Common Ground attempts to add contacts with the same last name and address, but no other matching information, to the same household account. If it is not enabled, contacts with no potential matches are automatically added to new household accounts.

**Note:** Address matching will work only if you are using address standardization in Common Ground.
3. Click the **Save** button after you have finished editing the page. Click the Online Configuration tab to return to the Online Configuration page.

You are now ready to [configure your Supporter Center](#), and design and publish forms for [online donations](#), [events](#), [volunteer shifts](#) and [email list signup](#).