

PayPal and Venmo

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An improved partnership with PayPal introduces the option for donors to give using either PayPal or Venmo on payment forms.

NOTE: You will need to create a PayPal business account for your organization if you do not have one before connecting it to your GiveSmart Fundraise account.

Link PayPal to GiveSmart Fundraise

To enable both PayPal and Venmo for all GiveSmart Fundraise forms:

1. Click on **Settings** (the Gear icon)
2. Click on the **Integrations** category on the left, then the **Payments** section in the middle.
3. Click on the **Link to PayPal** button.
4. This will take you over to PayPal where you will need to **log into your PayPal business account**.
5. Review the permissions and select **Allow** to authorize the connection between PayPal and your GiveSmart Fundraise account. This will add your PayPal merchant account to the list of options in your GiveSmart Fundraise account.

You can click **view all actions** on this screen to see more about the permissions being granted.

Approval for future payments refers to supporting recurring giving, which is automatically included with this integration.

There is also a reference to a fee. A processing fee of 3.5% is in place for all PayPal and Venmo transactions. A partner fee of 0% also applies.

6. If everything is connected correctly, your PayPal account will now work through GiveSmart Fundraise. Click **Return to GiveSmart** to return to your GiveSmart Fundraise Payment Settings.

Once you have returned to your GiveSmart Fundraise account, you will see PayPal listed as Active in your payment integrations. PayPal and Venmo are now automatically enabled on new payment forms going forward. Your credit card processor will remain as the default payment integration for any transactions not using PayPal or Venmo.

NOTE: If you need to change your linked PayPal account to a different one, please contact GiveSmart Fundraise Support so they can disconnect the current account for you.

Upgrading Your PayPal Integration to Add Venmo

If you previously connected your PayPal account with your GiveSmart Fundraise account prior to 2024, you will need to re-authorize the connection to add Venmo as a payment option. To do so, follow the steps above and click the **Add Venmo** button instead of the **Link to PayPal** button. The rest of the steps above are the same.

Once you have returned to your GiveSmart Fundraise account, you will see PayPal listed twice in your payment integrations. The new PayPal/Venmo integration will be set as Active and will be used for all new transactions where the donor chooses to pay with PayPal or Venmo. Your previous PayPal integration will be listed as Inactive but will remain in the background for the sake of processing any existing recurring donations. Your credit card processor will remain as the default payment integration for any transactions not using PayPal or Venmo.

Enable PayPal and Venmo on Forms

Once you've completed the steps above, PayPal and Venmo will be available on any forms. If you wish to enable or disable them for any existing forms, go to the Payment Information section of a form you wish to edit, and toggle whether to enable or disable **PayPal / Venmo as a payment method**.

NOTE: At this time, both PayPal and Venmo can be offered as a payment option on a form together, not separately.

Using PayPal as a Donor

To pay by PayPal on a GiveSmart Fundraise form, a donor must have a PayPal account.

1. On a form, a donor will select the **PayPal / Venmo** button in the payment options section. They will then be presented with a button for each method.
2. The donor then clicks **PayPal**.
3. A window pops up prompting them to log in to their PayPal account and select a payment source. Clicking **Complete Purchase** will send them back to the form, which will process the gift.

The payment form will update and bring the donor to the confirmation page. They will also receive an emailed receipt to confirm their successful transaction.

Using Venmo as a Donor

To pay by Venmo on a GiveSmart Fundraise form, a donor must have the Venmo mobile app.

1. On a form, a donor will select the **PayPal / Venmo** button in the payment options section. They will then be presented with a button for each method.

2. The donor then clicks **Venmo**.

3. If they are on their mobile device, their Venmo app will be opened where they will approve the transaction.

If they are on a desktop, a popup window will present a QR code they can scan with their phone. This QR code opens up their Venmo app, where they will approve the transaction.

Once the gift is approved, the payment form will update and bring the donor to the confirmation page. They will also receive an emailed receipt to confirm their successful transaction.

Reporting on PayPal and Venmo Transactions in GiveSmart Fundraise

1. In GiveSmart Fundraise, use the left menu and navigate to Existing Reporting > **Search Transactions**.

2. Include the Transaction Type **PayPal** in your search parameters and add filters as needed.

3. On the search results screen, click **Manage Columns** and be sure that **Payment Method** and **Billing transaction** are selected. Click Save and Apply.

The *Payment Method* column will indicate whether the transaction was paid using PayPal or Venmo. *Billing transaction* will return the unique 17-digit PayPal transaction ID.

4. Click **Export** to download this report as a .csv file.

Reporting on PayPal and Venmo Transactions in PayPal

To can also view the data captured on these transactions in your PayPal business account.

NOTE: Your PayPal Business Account is going to display donor names based on their PayPal

or Venmo account name. GiveSmart Fundraise reporting will display donor names based on what the donors input as their First Name and Last Name on the donation form.

1. Log into your business account at www.paypal.com, go to the reports portal and select either to view all transactions, completed payments, or balance affecting payments.
 2. Choose a date range within the last 3 years.
 3. Select a format.
 4. Click "Create Report".
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