Eventor's payment module version 1.1 24.2.2013

The payment module lets users order and pay for entries and services, for example event entries and membership fees, within Eventor. A number of payment methods/vendors are supported; see listing later in this document. If the user makes the payment online, e.g. using a credit card, it is automatically reconciled in Eventor. This document covers the following topics:

- the vocabulary that are used in the payment module
- settings to make before being able to receive payments
- search for orders and payments
- change an order and/or its amount
- registering offline payments manually
- creating reports

Vocabulary

Payment event

An competiton or similar that registers orders and payments in Eventor. Examples: event entries and services, membership fees. For each payment event, the organising club(s) determines which payment methods are available.

Order

An order of products or services for a payment event made by a customer, e.g. an event entry or membership application.

Customer

The customer is the one placing the order for a payment event. The customer is either a person or an organisation (club, state association, national association).

Payment

A payment for an order as stated above. The customer pays using any of the available payment methods.

Payment method

A payment event offers one or multiple payment methods, i.e. ways that the customer can pay. Payment methods are divided into online and offline payment methods.

Online payment methods let the customer pay immediately after the order is made, and the payment is automatically reconciled in Eventor. An example of an online payment method is payment by credit card using PayPal and direct deposit using POLi

Offline payment methods require that received payments are registered manually in Eventor. An example of an offline payment method is EFT, where the customer attaches the reference number when paying.

Please note that the payment event's organising club(s) must have an account set up at the payment method vendor.

Eventor supports the following payment methods:

- Internet banking payment using POLi (online)
- Credit card or PayPal account using PayPal (online)
- EFT (offline)

Note: PayPal is preferable because it provides details of payments including names as part of its bookkeeping reports.

Reference number

Each order has a unique reference number, usually eight digits, used to keep track of the order in the system. When a customer is paying using an offline payment method, the reference number must be attached.

Defining default settings for payment events

You are advised to first define default settings for payment events for your organisation. These default settings are then used as a template and will be pre-populated when connecting an event to the payment module, but can be overridden, if required, on a per-event basis.

You have to be logged in as an administrator for your organisation. Select *Club/State association/Federation > Club settings/State association settings/Federation settings* (the wording depends on the organisation level). Click *Create default settings for new payment events* in the *Default settings for new payment events* box. The following screen is shown:

In the *Payment receiver* field, enter the physical address of your organisations, along with contact details such as phone number, e-mail address and website address. No account information should be given here.

In the *Payment methods* section, tick the payment methods/vendors that are offered. You can tick one or multiple payment methods. Please note that an account has to be created and activated before a box is ticked!

Online payment methods usually have a *Test connection* button which lets you check if the account details you typed in are valid. The payment settings can't be saved if the account details are invalid.

Please refer to Appendix 1 for information about how to set up accounts for various payment methods.

Setting up payments for a payment event

This step is dependent on the type of payment event.

For event entries, navigate to the event's administration page and click *Payment*.

For membership fees, navigate to *Club/State association > Membership types > Payment settings*.

A screen similar to *Default settings for new payment events* is shown. The default settings are pre-filled. You may change them if required, and also specify time intervals when each payment method is available. This is useful if you don't want offline payments to be allowed close to the event.

Some additional settings are shown at the top. For example, the number of days payments are due after an order is made.

For more detailed information, please refer to the guides for event management and membership management.

Finance administration

Orders and payments are followed up at *Club/State association/Federation > Finances*. You can search for orders and payments, edit orders and register payments manually, and create reports.

Finance administration

📄 Payment summary   ✏ Register payments manually

Search orders

Person (name or ID)	
Organisation (name or ID)	
From	📅
To	📅
Search on payment time	☐
Reference number	
Application	[all] ▼
Event	[all] ▼
Status	[all] ▼
Orders with comments only	☐
Show details	☐

Search   Reset

Order can be searched by a number of properties.

Person – search for orders made by a specific person.

Organisation – search for orders made by a specific organisaton.

From and *To* – specifies the time interval for when the order was made. If the *Search on payment* time box is ticked, the search is instead performed on the times of received payments.

Reference number – search for an order by its unique reference number.

Application – search for orders within a specific application/module in Eventor, for example event entry or membership.

Event – search for orders for a specific payment event.

Status – search for orders having a specific payment status. An order has one of the following statuses:

- *Not paid* – no payment has been received.
- *Underpaid* – one or multiple payments have been received, but the amount is lower than the amount of the order.

- *Paid* – one or multiple payments have been received, and the amount equals the amount of the order.
- *Overpaid* – one or multiple payments have been received, but the amount is higher than the amount of the order.
- *Invalidated* – The order has been removed, either automatically due to the customer failing to pay within time, or manually by an administrator.

Click *Search* to make a search. Orders matching the search criteria are shown. Click the reference number to the left of the order to edit the order. Click the information icon to the right to show information about the order in a dialog box.

Edit an order

After having searched for orders at the *Finance administration* page, and clicked on a reference number for an order, the *Edit order* screen is shown.

Edit order

   ✏ Register payment   ✏ Merge with other order   📄 Receipt   🖨 Print refund form

Order information: Entry

Reference number	10018380
Order time	19/11/2012 23:12 EDT
Application	Event entry
Amount	90 AUD
Due date	27/11/2012
Status	✓ Paid

Products

Type 0 in the *Quantity* textbox to remove a product from the order.

Product	Reference type	Reference ID	Quantity	Price	Amount
Gold 'n Ponds Easter 2013 - 3 Days: entry for Joe Blow in M21E	Entry	433	1	90	90 AUD
					90 AUD

➕ Add

Customer details

First name	Joe
Surname	Blow
Street	1 Main Street
City	Tinyville
Postcode	1234
State	SA
Country	Australia
Email	joeblow@foo.com
Home phone	123456789

You can change, add and remove products, change customer details, add comments, or remove the entire order.

Add a product by clicking the *Add* link below the *Products* table. Type in *Product*, *Quantity* and *Price*. The *Reference type* and *Reference ID* if or internal usage only and should normally not be altered. You may add products with negative amounts, which is useful for discounts.

To remove a product, enter 0 in the Quantity field. If the entire order should be removed, for example if the customer made the order by mistake, tick the *Invalidate order* checkbox further down. The order can be commented using the *Comments* field at the bottom of the page.

Click *Save* when finished.

There are a few links at the top of the page. *Register payment* lets you register a payment manually for the current order. *Merge with another order* is used when a customer has made multiple orders, but wishes to make a single payment for all orders. If the order is not yet paid, there is a *Invoice* link that generates an invoice in PDF format. There is also a *Pay* link which leads to the order's payment page. When payment has been received, the *Receipt* link is shown, which generates a receipt in PFD format when clicked.

Export payment summary

Click the *Payment summary* link at the top of the *Finance administration* page. The following screen is shown:
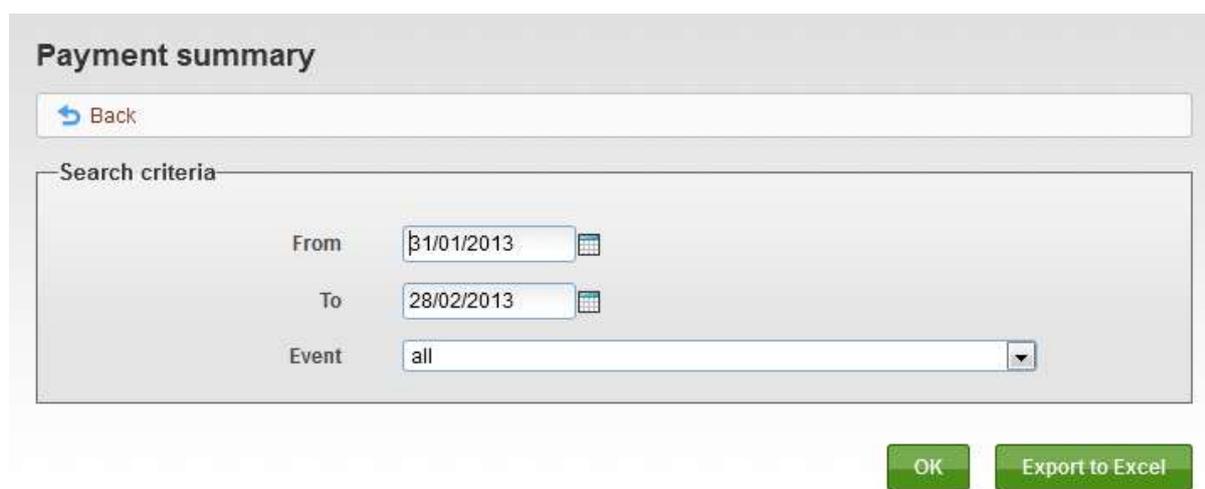
Select time interval using the *From* and *To* fields. Please note that filtering is made on payment time, not order time. You can pick a payment event in the *Event* list, or include all payment events for the club/state association/federation by selecting *all*.

Click *OK* to display a summary on the screen, or *Export to Excel* to create an Excel file containing the payments.

Registering payments manually

Click the *Register payments manually* at the top of the *Finance administration* page. This function is used to register payments received by offline payment methods, e.g. EFT payments.

Register payments manually

ℹ️ NOTE! Only payments that have been paid to the account or withdrawn from the account shall be registered on this page, unless the checkbox "Exclude from accounting" is checked. If possible, add adjustment posts on the order instead.

Payment date	Reference number	Amount		Comment
19/2/2013	10018380	90	AUD	

✅ Paid
Entry, 90 AUD, Joe Blow, 1 Main Street, Tinyville 1234, SA, Australia
☐ Adjust the order's value to paid amount
☐ Exclude from accounting

Payment date	Reference number	Amount		Comment
			AUD	

[Save] [Cancel]

Type in payment date (in *dd/mm/yyyy* format), reference number, amount, and a comment (optional). Navigate between the input fields with the Tab key. When leaving the reference number field, the corresponding order is loaded and displayed on the line below. When leaving the amount field, the line below is updated with the new payment status.

The checkbox *Adjust the order's value to paid amount* is used if the paid amount is not equal to the order's amount, but the order is considered fully paid anyway. This is useful for international payments where the banks usually charge a transaction fee.

The checkbox *Exclude from accounting* is used when the payment should be excluded from the payment summary due to accounting reasons.

When all payments are registered, click *Save*.

You may also register a payment for a specific order at the order's edit page. Refer to *Edit order* above.

It is very important that the whoever is handling the money in your club or association knows what you have done if you are not that person. If they are not told they will find it hard to reconcile the payments. If a person doesn't make a payment straight away to Paypal/Eventor they can go back into their events & make a payment & it is recorded automatically. Where a club uses manual EFT the payment will always have to be recorded this way.

Appendix 1

This appendix covers how to create accounts for various payment methods.

PayPal

This guide covers the process of creating a PayPal business account for your club and connecting it to an event in Eventor, making it possible for entrants to pay their entry fees through PayPal. One PayPal account can be connected to many events in Eventor, so typically a club just needs to create a PayPal account once.

1. Go to https://www.paypal.com and click Sign up at the top of the page.

2. Click "Get started" under "PayPal for business".

3. At the next two pages, enter the required information for your club.

PayPal

Business Account Sign Up   Secure 🔒

[1] Information   [2] Account

Business Information
Please enter the information for your group, organisation, government entity, individual business or partnership.

Business type
-- Choose a Value -- ▼

Business name
[   ]

Address
[   ]

Address Line 2 (optional)
[   ]

Postal Code   City
[   ]   [   ]

Country

PayPal

Business Account Sign Up

1 Information   2 Account

Create a PayPal business account login

Please fill out all fields

Email Address
You will need this to log into PayPal

[   ]

Password

[   ]

Re-enter password

[   ]

Security question 1 What's this?
[--Choose one--   ▼]

Answer
[   ]

Security question 2
[--Choose one--   ▼]

Answer
[   ]

8SGPfZ

4.   The account has now been created. Change the payment solution to Express Checkout.

Log Out | Help | Security Center

PayPal

| My Account | Send Money | Request Money | Merchant Services | Auction Tools |

Overview   Top Up   Withdraw   History   Resolution Center   Profile

My Business Setup

Welcome to My Business Setup. From setting up your payment solution to processing your orders and bookkeeping, this comprehensive tool is designed to help jump-start your business.

My payment solution

Set up my payment solution

PayPal offers you different ways to get paid. We'll explain your options and help you get started.

Start Now

Your payment solution: **Website Payments Standard** Change

View all products to learn more or select an additional payment solution or we can recommend one that fits your needs.

Change payment solution

Please note that changing your payment solution will give you different
help information in your setup guide.

Payment solution:

Add new...

OK   Cancel

My Business Setup > PayPal Business Products
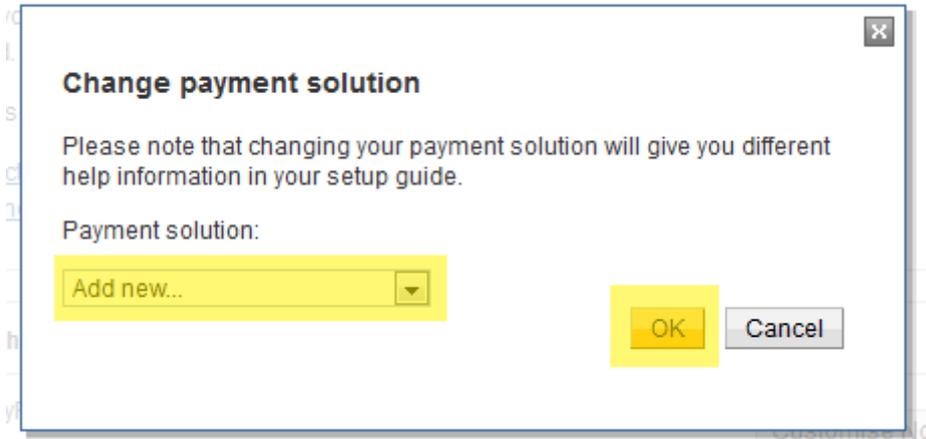
CHOOSE A PAYMENT SOLUTION FOR YOUR BUSINESS

PayPal for Business Solutions

PayPal on eBay

PayPal is the perfect eBay payment method, whether you're a new business about to start selling or an established business looking to pump up your sales.

ADD PRODUCT

Mass Pay

Eliminate the time, cost, and hassle of sending money to individual recipients - make multiple payments instantly via email.

ADD PRODUCT

Learn more

Website Payments Standard

Simply add a PayPal payment button to your site and you'll be able to accept payments from all major credit and debit cards, as well as from bank accounts around the world.

ADD PRODUCT

Learn more

PayPal Invoicing

Whether your business is online or offline, PayPal invoicing gives you a fast and professional way of requesting payment. Send a professional-looking invoice via email. Customers can pay you instantly, even without a PayPal account.

ADD PRODUCT

Learn more

Express Checkout

Increase your sales just by adding a PayPal payment button. Integration is easy, and customer data can be handled in a way that meshes with your current system.

ADD PRODUCT

Learn more

PayPal for Digital Goods (Express Checkout)

PayPal for Digital Goods (Express Checkout) is a streamlined checkout experience with a specially designed pricing model.

Requires Sign-up

ADD PRODUCT

Find Out More

5. Click the "Start Now" button.

PayPal

| My Account | Send Money | Request Money | Merchant Services | Auction Tools |

Overview   Top Up   Withdraw   History   Resolution Center   Profile

My Business Setup

Welcome to My Business Setup. From setting up your payment solution to processing your orders and bookkeeping, this comprehensive tool is designed to help jump-start your business.

My payment solution

Set up my payment solution

PayPal offers you different ways to get paid. We'll explain your options and help you get started.

Start Now

Your payment solution: **Express Checkout** Change

View all products to learn more or select an additional payment solution or we can recommend one that fits your needs.

6. Click "Profile".

7. Click "My Profile" (might also be displayed as "Profile").

8. Click "My selling tools".

9. Click "Update" next to "API access".

PayPal

| My Account | Send Money | Request Money | Merchant Services | Auction Tools |

Overview   Top Up   Withdraw   History   Resolution Center   Profile

My Profile

My business info	eBay ID	Link my eBay ID to my PayPal account	Update
Email, address, phone, more.			
	Selling online		
My money	PayPal buttons	Manage my payment buttons.	Update
Banks, credit cards, more.	Credit card statement name	My business name on card statements is: MATS TROENG	Update
My settings	Sales tax	Set up sales taxes for multiple regions	Update
Notifications, customer ID, more.	Custom payment pages	Set up PayPal payment pages to look like my website.	Update
My selling tools	Website preferences	Return customers to my website after they pay with PayPal.	Update
Getting paid, shipping, more.	API access	Manage API credentials to integrate my PayPal account with my online store or shopping cart.	Update
	Invoice templates	Create and manage my invoices.	Update
	Getting paid and managing my risk		
	My automatic payments	Manage the subscriptions and automatic payments that I offer my customers.	Update
	Instant payment notifications	Integrate PayPal payment notifications with my website.	Update
	Block payments	Limit payments, add instructions, and more.	Update
	Customer service message	Create a personalised message for customer disputes.	Update
	Shipping my items		
	Shipping calculations	Create unique shipping methods for each customer	Update

10. Click "Request API credentials".

11. Select the "Request API signature" option and click "Agree and Submit".

12. Your API username, password and signature are shown.

13. At the event's administration page in Eventor, click "Payments". Under the "Payment methods" caption, check the "PayPal" checkbox and enter the API user name, password and signature obtained in the previous step into the textboxes. You may click "Test connection" to make sure everything works. Finally, click Save.

Payment methods

Available payment methods are listed below. Tick the checkboxes next to the payment methods to provide, and specify the settings for each of them in the input fields shown.

☑ **PayPal**

Activation time	
Incativation time	
ApiUserName *	
ApiPassword *	
ApiSignature *	

Test connection

POLi
Using POLi

POLi forms a link between Eventor and an entrant to their bank to make an EFT payment. POLi gives the person a dropdown option of the banks to choose, and then the person makes their payment as a normal internet banking transaction.

The POLi fee is charged monthly to the Association.

Signing up with POLi is not a problem because POLi is not handling anyone's money; they are just connecting the entry fee with the bank for a person to pay by EFT.

1. https://signup.apac.paywithpoli.com/Signup/Company to start the sign up.

2. Decide the **payment plan** – do some calculations of typical usage to decide whether to use the micro or the standard. The fee calculation depends on the number of entries and entry fee. A state orienteering association taking entries for state or national events may use the 'standard' plan. A club may use the 'micro' plan.

Screen shot please to show the options

3. **Profile details** to give details of your organisation. Screen shot please

4. **Payment details** are the details of the organisation's bank account to receive payments. Screen shot please

5. Once you have signed up with POLi there is some special coding to attach it to Eventor.

A problem with POLi. POLi payments show up on the receiver's bank statement as individual deposit identified by a special POLi number. The details of the payer are not provided unless they are written in and the reason for the payment is also given. If you require details of name and order (what the person is paying for), then the transaction must be tracked back individually through the POLi number to the Eventor number. Screen shot please to show the transaction record from POLi if possible without divulging sensitive information.

But, POLi is preferable to an unlinked EFT which may done any time after the entry. An administrator will then have to record the payment in Eventor.

EFT

TODO