



Get to Giving

A Guide to Getting Started



National Church

Powered By  PINEAPPLE PAYMENTS

app.pineapplepayments.com



You can get up and running within minutes.

Follow the steps below to:

- 1.** Customize Your Giving Experience
- 2.** Set Up & Share Your Giving Page
- 3.** Enable Recurring Giving
- 4.** Track Giving With Reports

Important:

You will need to receive your Welcome Email from Pineapple Payments to gain access and get started.
The email will include your Login Credentials.

1. Customize Your Giving Experience

Upload Your Logo

Upload your logo to customize Hosted Giving Pages with your brand. This simple option expands your church's branding visibility and helps donors feel more secure as they recognize your logo.

1. Login to your Pineapple account.
2. Hover on the "Settings" tab towards the top of the page.
3. Click on "Merchant Configuration".

Merchant Configuration

Edit Merchant Profile | Default Virtual Terminal Config | Default Swipe Terminal Config

MERCHANT LOGO:

Upload a logo file to be used on any branded page.

Header/LogoFile:

Choose File | No file chosen

TRANSACTION API KEY:

There is only 1 functional API key at a time. Generating a new API key will disable and erase the existing API key if you generate a new key, you will need to replace the key everywhere you are using currently using it.

3b21ef7af778bd8e3cfeee23e8bcbdeae6940daed42c5ccac8e7ce04

Generate New Transaction API Key

USER MANAGEMENT TOOLS:

Group Permissions - This feature allows for organizing users into one or more groups and control their gateway permissions as a whole.

MID Permissions - This feature allows you to specify which MID's a user, or group, can use.

TRANSACTION TYPE:

Unselecting transaction types will drop them from all products in the gateway.

Auth Adjustment Credit Void Capture Sale Refund

CARD TYPES:

Select credit card types used

Visa MasterCard Discover AMEX

REPORTS:

Daily Report

Default From Email

SETTLEMENT CONFIGURATION:

Auto Settlement Time: 11:30 PM

Processor: Pittsburgh Office - First Data

Settle Now: [Settle Now](#)

MULTIPLE PROCESSOR DETAILS:

Processor ID	Nickname	Processor
3158	ACH Processor 1	Payza
10018	Cash	CASH
11471	Chicago Office	VANTIV610
3157	Pittsburgh Office	First Data Omaha

AVS-CVV FILTERS:

The following AVS and CVV responses will be declined (Applies to Processors: Chicago Office).

[Edit Filters](#)

INVOICE MANAGER CONFIGURATION:

Business to Business Business to Consumer

Allow Future Scheduled Payments

Allow Partial Payments

Require Reason for Partial Payments

Presentment Only

Reminder Email Intervals

30 Days 45 Days 15 Days 60 Days

4. Find the "Merchant Logo" tile and click "Choose File" to upload your logo (must be jpeg or png format).
5. Click the "Save" button at the bottom of the page.
6. You're done! Your logo is successfully uploaded.

Merchant Configuration

Edit Merchant Profile | Default Virtual Terminal Config | Default Swipe Terminal Config

MERCHANT LOGO:

Upload a logo file to be used on any branded page.

Header/LogoFile:

Choose File | No file chosen

Uploaded



National Church

Header/LogoFile

Choose File | No file chosen

[Remove Logo](#)

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Reminder Email Intervals

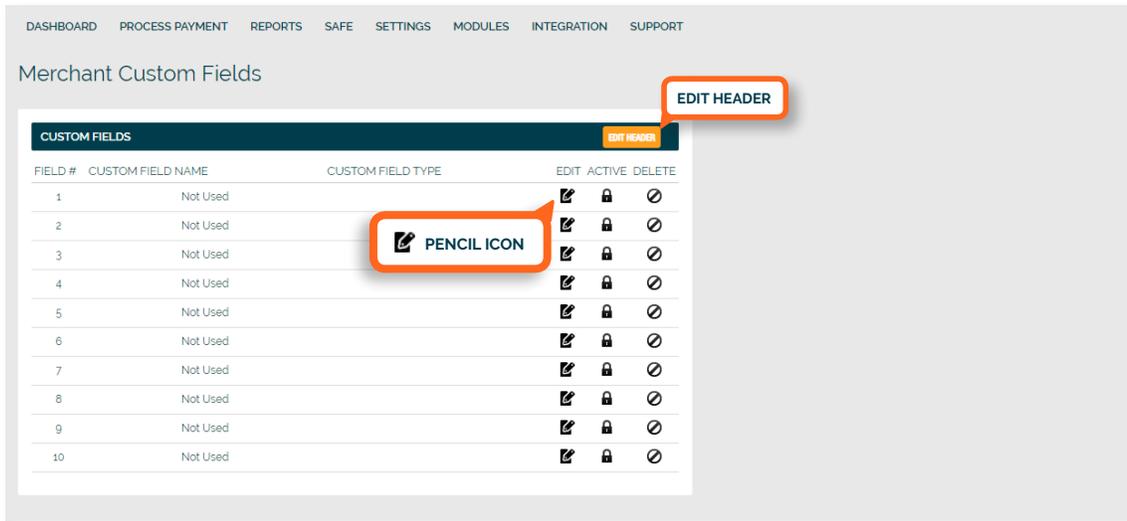
30 Days 45 Days 15 Days 60 Days

[SAVE](#)

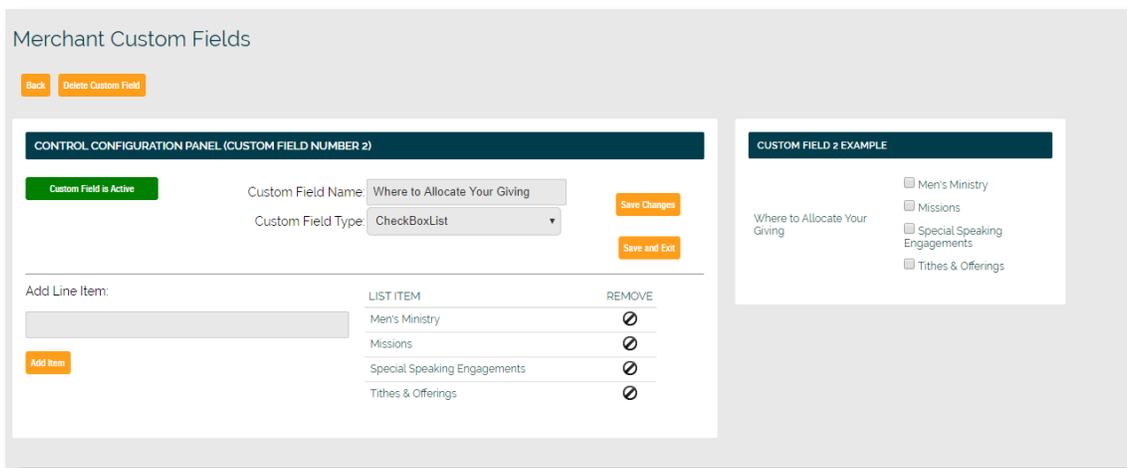
Create Your Custom Fields

Create up to 10 custom fields and use them to collect unique and important data from your donor. Custom Fields can be used at every point of payment interaction as well as used to search, find, or track donations using reporting tools.

1. Hover on the "Settings" tab towards the top of the page.
2. Click on "Custom Fields".
3. Click on the "Edit Header" button to rename your Custom Field category. Select the pencil icon next to each field to "Edit" and customize to your needs.



4. The "Custom Field Name" is the text that will appear next to the field to describe it.
5. The "Custom Field Type" is the type of format you will use to control data input. This includes Textbox, Drop-down lists, Check-box lists, and Radio button lists.
 - a. Need a Custom Field like "Parish I.D. Number"? Use a textbox.
 - b. Need a Custom Field with a pre-determined list of selections? Radio button and Drop-down lists work great for single selections. Checkbox list works great for multiple selections.
6. Click "Save & Exit" to create each field.



7. View your Custom Field creations. You can add, edit, and remove them over time.
8. That's it! You're done.,

Customize Email Receipts

Skip this section if you wish to use our standard email receipt template or follow these simple steps for customizing the email receipt notifications that go out automatically after a transaction.

1. Hover on the "Settings" tab towards the top of the page.
2. Click on "Custom Email Notifications".
3. Review "Editable" receipt templates.

Custom Field Key [View Transaction Fields](#)

EDITABLE

- Successful - Email Receipt
- Successful - Print Receipt
- Failed - Email & Print Receipt
- Recurring Initial - Email Receipt
- Recurring Successful - Email Receipt
- Recurring Failed - Email Receipt
- Update Email Update SAFE Link
- Invoice Manager - New Customer
- Invoice Manager - New Invoice
- Invoice Manager - Pay Invoice HPP Link
- Invoice Manager - User Forgot Password
- Invoice Manager - Invoice Reminder

NON-EDITABLE

- Batch Upload
- Daily Settlement
- Daily ACH Settlement
- Profitstars Transaction Update
- Expiring Credit Cards
- Forgot Password
- Retrieve Account#

SUCCESSFUL TRANSACTION RECEIPT

The gateway will automatically email receipts and notifications to your customers and other parties for certain system events, such as transactions or welcome emails. You may edit the content of these messages below. You may also choose who does or does not receive each notification. Use the Custom Field Key guide at the right to pull data from the gateway, such as Transaction ID numbers.

AUTO MESSAGE - DO NOT REPLY

Thanks for your order. We appreciate your business. Please save this receipt for your records.

KEY TRANSACTION INFORMATION

Date of Transaction: {createdate}
Order Description: {orderdescription}
Transaction Type: {transactiontype}
Total Dollar Amount: {amount}
Transaction ID Number: {trans_id}

BILLING INFORMATION

Credit Card Number: {ccnumber}
Credit Card Expiration: {ccexpdate}
Name: {billingfirstname} {billinglastname}
Address 1: {billingaddress1}
City, State, Zip: {billingcity}, {billingstate}, {billingzip}
Phone: {billingphone}
Email: {billingemail}

ReplyTo Email:

Who should get this email? Merchant Customer Other

SAVE CHANGES RESTORE DEFAULT RECEIPT

4. Each email template allows for customization of the message and audience.
 - a. Put your cursor in the gray box to edit message content.
 - b. Decide who receives the email and where replies should go.
5. Want to add your Custom Field data? Use the Custom Field Key.
6. Click "Save Changes" at the bottom of the page.
7. You're done! Review your customized receipt.

Custom Field Key [View Transaction Fields](#)

EDITABLE

- Successful - Email Receipt
- Successful - Print Receipt
- Failed - Email & Print Receipt
- Recurring Initial - Email Receipt
- Recurring Successful - Email Receipt
- Recurring Failed - Email Receipt
- Update Email Update SAFE Link
- Invoice Manager - New Customer
- Invoice Manager - New Invoice
- Invoice Manager - Pay Invoice HPP Link
- Invoice Manager - User Forgot Password
- Invoice Manager - Invoice Reminder

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SUCCESSFUL TRANSACTION RECEIPT

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Thank you for your donation. Your generous giving keeps us going. Please save this receipt for your records.

DONATION INFORMATION

Donation Amount: {amount}
{custom_field_7}

BILLING INFORMATION

Credit Card Number: {ccnumber}
Credit Card Expiration: {ccexpdate}
Name: {billingfirstname} {billinglastname}
Address 1: {billingaddress1}
City, State, Zip: {billingcity}, {billingstate}, {billingzip}
Phone: {billingphone}
Email: {billingemail}

ReplyTo Email:

Who should get this email? Merchant Customer Other

SAVE CHANGES RESTORE DEFAULT RECEIPT

2. Set Up & Share Your Giving Page

Set Up Your Hosted Giving Page

Hosted Payment Page (HPP) is a simple and secure payment page hosted by Pineapple Payments. HPP empowers donors to choose their giving amount and enter payment information for quick online giving.

1. Hover on the "Modules" tab towards the top of the page.
2. Click on "Hosted Payment Page".
3. Select "Add New Hosted Page" button to create your page.
 - a. There's no limit to how many pages you can create. Create one HPP for tithes & offerings and another HPP to sell event tickets! The options are endless.
4. Configure your preferences from the "Hosted Payment Page creator".

5. For open giving, check the "Cardholder specific amount" box and enter your Statement Descriptor in the "Link Text" field.
 - a. Your Statement Descriptor could be something as simple as "Give Today", "Give Now", or "Giving Amount".
6. SAFE can be used to save the donor's payment information on file for Recurring Giving. Review PT.3 of this guide for more information.
 - a. For One-Time Giving only, check the "Disallow Add to Safe" box.
 - b. For Recurring Giving, check "Add or Update Safe Automatically".
7. Choose preferred format. Select "See Sample" to see differences in page design.
8. Complete your Field Setups. Define what billing, shipping, optional, and custom information you want to collect from your donor.
 - a. **Required:** To make a field required, check both the "Required" and "Visible" boxes next to that field.
 - b. **Optional:** To make a field visible optional, you must only check the "Visible" box next to that field.
 - c. **Hidden/Not Used:** To hide a field, you must uncheck both the "Required" and "Visible" boxes next to that field.

9. Review your setup. It should look something like this.

10. Click the "Generate Link" button to create your page.

Share Your Hosted Giving Page

There are many ways to share your page with your customers. Simply Copy, Paste, and Share.

1. Immediately after creating your Giving Page, you're routed to our "Link Generator".
2. If you need to get back to "Link Generator" in the future, hover on the "Modules" tab, select "Hosted Payment Page", and choose "View".
3. Copy the link and paste it into a new window to view your page.

4. There are 5 different ways to share your page.

- a. **Quick Link Email** – Our system will email the unique page link to your customer.
- b. **Link** – This is your unique page URL. Share it the same as you would share any other link – email it, post it to your webpage, etc.
- c. **HTML Code** – This is a snippet of code you can share with your programmer/developer. This will generate a giving button to your website.
- d. **IFRAME Code** – Similar to the HTML code, this is a snippet of code that you can use to connect the page to your website. Instead of creating a button, IFRAME will embed the page into your site.
- e. **QR Code** – A unique QR Code is generated. Use this on flyers, business cards, posters, etc. Your donors simply scan the code with their phone and your page is automatically linked.

5. Choose how you want to share your page and that's it! You're done!

Link Generator

[Return to Config Page](#)

QUICK LINK EMAIL

To:

From:

Subject:

Message:

[Email Link](#)

LINK

The URL below is the direct link for the hosted payment page you are currently viewing.

```
https://app.pineapplepayments.com/HostedPaymentForm/HostedPaymentPage2.aspx?hash=2fXGv6Gk4b7WqMj3xmt1tp0r0B0D0dbzyK/WSPG0a1%3D
```

HTML

The text below is HTML code that your programmer can use to post a link to the payment form on your website. The link will open in a new tab or window depending on the user's settings. To use this code simply copy and paste the text below into an HTML webpage.

```
<a href="https://app.pineapplepayments.com/HostedPaymentForm/HostedPaymentPage2.aspx?hash=2fXGv6Gk4b7WqMj3xmt1tp0r0B0D0dbzyK/WSPG0a1%3D">Giving Amount</a>
```

[Giving Amount](#)

IFRAME

The text below is iframe code that your programmer can use to embed the payment form on your website. This will not open a separate tab or window, but will actually show the payment form on your website. To use this code simply copy and paste the text below into an HTML webpage.

The payment form is protected by the gateway's SSL Certificate within the IFRAME. If you post the IFRAME onto a webpage which does NOT have an SSL, then your customers may be presented with a browser security warning. To avoid this, only use the IFRAME on a webpage which also has an SSL Certificate.

```
<iframe id="hpp_iframe" src="https://app.pineapplepayments.com/HostedPaymentForm/HostedPaymentPage2.aspx?hash=2fXGv6Gk4b7WqMj3xmt1tp0r0B0D0dbzyK/WSPG0a1%3D"></iframe>
```

Example iframe rendering



QR CODE

QR Codes are two dimensional barcodes that will open the HPP. Mobile devices such as smartphones or tablets can scan the QR Code and it will automatically open the payment form on their device. The HPP will be dynamically formatted to display correctly on any size screen webpage.

You can display this QR Code anywhere your customers will have mobile devices - posters, t-shirts, banner ads on websites, invoices, and more. Simply save the QR Code image below to your computer and print, share, and display it wherever you want!



3. Enable Recurring Giving

How Recurring Giving Works

Recurring Giving is an optional feature, requiring manual setup. You can skip this step if you choose to collect one-time donations only. This section outlines how the recurring process works and the manual process involved when storing a donor's payment information for use on Recurring Giving.

1. Donors cannot create their own Recurring Giving plans. However, you can securely store a donor's payment information and enroll them into Recurring Giving.
 - a. Recurring Giving plans must be setup individually for each donor.
 - b. Recurring Giving plans can be established for any schedule (daily, weekly, monthly) or amount.
2. To enable the option of Recurring Giving, you must:
 - a. Add recurring fields to your Giving Page.
 - b. Enable SAFE on your Giving Page.
 - c. Review your SAFE list and create Recurring Giving plans for those donors.

Add Recurring Fields to Your Giving Page

Create custom fields to collect Recurring Giving information. Add those custom fields to your Giving Page.

1. Hover on the "Settings" tab towards the top of the page.
2. Click on "Custom Fields".
3. Click the "Edit" icon next to a "Not Used" field to create new fields for Recurring Giving.
4. Create fields to collect data for Recurring Giving. This could include a radio button field asking the donor if they'd like to give one-time, weekly, monthly, etc.

The screenshot shows the 'Merchant Custom Fields' configuration page. At the top, there are 'Back' and 'Delete Custom Field' buttons. The main area is divided into two panels. The left panel, titled 'CONTROL CONFIGURATION PANEL (CUSTOM FIELD NUMBER 3)', contains a 'Custom Field is Active' status indicator, a 'Custom Field Name' input field with the placeholder 'Make this a:', a 'Custom Field Type' dropdown menu set to 'Radio Button List', and 'Save Changes' and 'Save and Exit' buttons. Below this is an 'Add Line Item' section with a table listing items: 'Recurring Donation - Weekly', 'One-Time Donation', 'Recurring Donation - Monthly', and 'Recurring Donation - Weekly', each with a 'REMOVE' button. The right panel, titled 'CUSTOM FIELD 3 EXAMPLE', shows a 'Make this a:' section with three radio button options: 'One-Time Donation', 'Recurring Donation - Monthly', and 'Recurring Donation - Weekly'.

5. Once you've created your custom fields, you must add them to your Hosted Giving Page.
6. Hover on the "Modules" tab towards the top of the page.
7. Click on "Hosted Payment Page" and select "Edit" to update your Giving Page with recurring data fields.

8. Check the "Add or Update Safe Automatically" box in the SAFE section.

UNIQUE LINK GENERATOR

Create a specific link by adding the Amount and Link Text below.

Fixed Amount: \$

Cardholder specifies amount.

Link Text:

Return URL:

Leave *Return URL* blank for default HPP Results page.
Ask your developer before using: [Return URL Developer Info](#)

SAFE: Disallow Add to Safe
 Add or Update Safe Automatically
 Add Safe/Update safe ONLY (no payment)

Transaction Type:

Select Format:
[See Sample](#)

Usage Count:

Start Date/Time:

End Date/Time:

9. Check the boxes next to your recurring custom field to display it on your page.

CUSTOM FIELD SETUP

REQUIRED

VISIBLE

Make this a: Required Visible

10. Click the "Update Link" button. That's it!

11. Read on to see how you can create recurring giving plans for the donors that have opted to repeat their donations.

Create Recurring Giving Plan

Once you've enabled SAFE on your Hosted Giving Page, you can find the customers that have stored their payment information for Recurring Giving.

1. Hover on the "Safe" tab towards the top of the page.
2. Click on "Manage Safe".
3. There are various filters you can use to search for your donor. You can search for any donor using the search criteria. *Tip: Search for donors using your Recurring Giving Custom Field criteria. This will allow you to see what type of giving your donor opted for.

Customer SAFE

New SAFE with Transaction New Customer no Transaction Edit SAFE-Update Link

SEARCH BY TRANSACTION

10 active SAFE records

Active

Payment Type

Credit Card Last 4

SAFE ID

Start Date

End Date

SEARCH BY CUSTOMER

First Name

Last Name

Company

Email

SEARCH BY MERCHANT CUSTOM FIELDS

Make this a:

One-Time Donation

Recurring Donation - Monthly

Recurring Donation - Weekly

SEARCH

4. After clicking "Search", review your SAFE results. You'll see a list of donors, including the "Create" date they enrolled.
5. Click on the "Recurring" icon next to a donor to create their Recurring Giving plan.

SAFE RESULTS

SAFE ID	First	Last	Company	Email	Details	Active	Create	History	Edit	Recurring	New	Email SAFE-Update Link
3106822	John	Donor		give@donor.church	Credit Card 1111 12/26	YES	3/19/2020					

6. You will be routed to the "Recurring Plan Information" page. Designate the Recurring Giving schedule for your donor on this page.
7. The first tile to complete is "Recurring Plan Setup".
 - a. **Initial Amount:** This amount only runs one-time, immediately when the recurring giving plan is created. If an Initial Amount doesn't apply, enter \$0.00.
 - b. **Recurring Amount:** This amount is the recurring donation amount that will run automatically according to the designated schedule.

RECURRING PLAN SETUP

Start amount: I want to charge my customer...

Recurring amount: I want to charge my customer...

8. The second tile to complete is "Recurring Plan Detail".

- a. **I want to charge my customer every:** Designate how often the plan will run (i.e. every 1 month, every 1 week, etc.). Enter in the Quantity and then select your appropriate frequency (months, weeks, days).
- b. **The next date I want to charge my customer is:** Choose when recurring giving will begin.
- c. **The last date I want to charge my customer is:** If applicable, choose when recurring giving will end. If you do not have a specific end date, leave blank.
- d. **If a recurring transaction fails, reattempt the charge for the next ___ days:** In the case of a decline or payment failure, this feature allows you to have a recurring transaction reattempted automatically. We will stop auto-retrying until either the number of retries has exceeded OR successful payment is collected.

RECURRING PLAN DETAIL

I want to charge my customer every...
 days months weeks

The next date I want to charge my customer is...

The last date I want to charge my customer is... (Leave blank for no end date)

If a recurring transaction fails, reattempt the charge for the next... days

9. Click the "Create Plan" button to finish. That's it! You're done. Future giving for this donor will be automatic.

4. Track Giving With Reports

Search Transaction Reports

Now that you've created your Giving Page and shared it with donors, how do you track your incoming donations? Our Transaction Report is a great tool to use!

1. Hover on the "Reports" tab towards the top of the page.
2. Click on "Transaction".
3. There are various filters you can use to narrow down the specific transaction(s) you're looking to view. Use the Transaction Source filter of "Hosted Payment Page" to track donations from your Giving Page.

Transaction Report

Check/Uncheck checkboxes next to search fields to display that field on the report. Some fields will always be displayed (All fields are included Export to Excel/csv)

FILTER BY TRANSACTION

Start Date: 3/19/2020

End Date: 3/19/2020

Amount Range: \$ to \$

Transaction Result:

Transaction Type:

Payment Type:

Card Type:

Card Number: Last 4 Only

ADDITIONAL TRANSACTION FILTERS

Card not present Card present Both

Transaction ID:

Description:

PO Number:

Order ID:

Invoice ID:

Multiple selected processors

Select none for ALL Processors

ACH - ProfitStars - ACH

ACH Only - ProfitStars - ACH

Cash - CASH

Tiffany Demo - TSYS

Transaction Source: Hosted Payment Page

FILTER BY CUSTOMERS

First Name:

Last Name:

Company:

Email:

State:

Customer SAFE ID:

Users:

Filter By: Custom Fields

Parish ID Number:

Men's Ministry

Missions

Special Speaking Engagements

Tithes & Offerings

SAVED SEARCHES

Enter a new search name to save current search criteria:

4. Click the "Search" button to see a summary of your Transaction Report results.
5. Want to see details? Click the "Magnifying Glass" icon to view transactions individually, per transaction, or see all transaction details by clicking the "Export - Excel" button.

Transaction Report

REPORT RESULTS

Count: 1 Net Volume: \$50.00 Gross Amount Net Amount

History	Trans ID	Date/Time	Customer	Trans Type	Payment Type	Account	Amount	Status Msg	View
	25243559	3/19/2020 8:37:52 PM	John Donor	sale	creditcard	4****1111	\$50.00	APPROVAL	<input type="button" value="View"/>