

The logo for Active Data Calendar PayPal Payflow Pro, featuring the words "active data" in a bold, sans-serif font above the word "CALENDAR" in a large, bold, sans-serif font, with a blue swoosh underline. Below "CALENDAR" is the text "PayPal Payflow Pro" in a bold, sans-serif font.

active data CALENDAR

PayPal Payflow Pro

User Guide

Version 3.9

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1.0 Welcome to Active Data Calendar with PayPal Payflow Pro

Active Data Calendar is your solution to sharing event information with customers, students, partners and other key constituent groups throughout your organization.

Active Data Calendar with PayPal Payflow Pro provides your organization with an enterprise solution for all of your scheduling, event publishing, promotion and payment processing needs. Events can include facility requests, resource requests, marketing classification and registration for both free and fee-based events.

Active Data Calendar can be used to display events on your organization's Web site, Intranet, Extranet, and more. You can even share event information across multiple Web sites.

Active Data Calendar is easy to use with its browser-based interface. This allows users to enter and view calendar information from any Internet connection.

Included with Active Data Calendar is "Online Administration" that allows for different levels of security to be established. This will allow for entry of events from many levels of your organization, while still having the ability to approve events before they are viewed on your Web site.



TIP: It is recommended before starting that you review the terminology in - [Glossary of Terminology](#) found at the back of the User Guide.

Note: This document will address registrants and the use of PayPal Payflow Pro. For information on other calendar functions please log onto your Clients Only page and view the Active Data Calendar User Guide.

2.0 What is PayPal Payflow Pro

Payflow Pro is a "payment gateway" that connects you to your existing internet merchant account. It enables your organization to:

- **Accept credit cards, debit cards,** more. Plus accept PayPal too (U.S.only).
- **Optimize the customer experience** by letting registrants complete the checkout process without leaving your website.
- **Stay secure** with access to one of the most powerful risk-management systems.

3.0 How PayPal Payflow Pro is used with Active Data Calendar

Active Data Calendar has tapped into the power of Payflow Pro to allow for a more advanced event registration experience. Your organization can utilize Payflow Pro to accept registration for your events, modify payments and even cancel/refund payments all from the registration area of Active Data Calendar.

4.0 Requirements

There are some requirements that must be met in order to connect your Calendar to Payflow Pro.

1. PayPal Payflow Pro Merchant Account
 - This account is set up by you or your organization.
 - Further information is available at https://www.paypal.com/cgi-bin/webscr?cmd=_payflow-pro-overview-outside
2. Active Data Calendar Advanced Registration Module
3. You will need to secure the ADXSecure directory.
 - Requires the purchase of a secure key.
 - This key can be purchased through Active Data Exchange
4. Further requirements/specifications for Active Data Calendar are available on your Clients Only page.

5.0 Security

Active Data Exchange considers security of your information and your registrant's information to be a top priority! For this reason we do not maintain credit card data in our database. Any information that is stored is kept in a secured file folder on the system and all transactions are processed over a secure connection utilizing Hypertext Transfer Protocol Secure (HTTPS) which is a combination of HTTP with SSL/TLS to provide encrypted communication.



As part of our commitment to Security we will provide Tips for securing your Calendar and Payflow Pro account information while working in calendar. These tips are not required (unless otherwise specified) and will be noted with a padlock icon before the tip.

If you have any questions regarding Security and Active Data Exchange please contact our support team using support@activedatax.com or by calling 610-997-8100.

6.0 Creating Payment Account(s) and Permissions

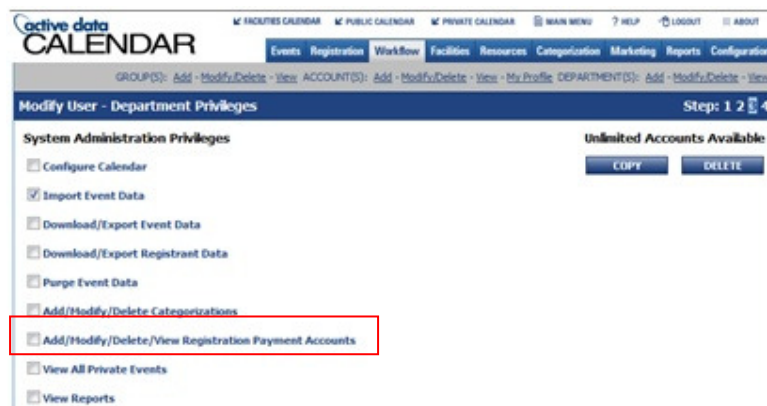
6.1 Verify Active Data Calendar Security

In order to create a new payment account in Active Data Calendar the Super User of the Calendar will need to specify permissions to any User/Administrator Accounts that should have access to Add/Modify/Delete/View Registration Payment Accounts.

From the Administration Area of the calendar go into Workflow and modify a current user or add a new user. On the Department Privileges screen you will need to check the box that reads

“Add/Modify/Delete/View Registration Payment Accounts”.

The screen to the right shows the Department Privileges screen at



Step 3 of the User account. The selection to be able to control Registration Payment Accounts is on this screen for both current users and when creating new users.



Security Tip: Limit the amount of users that are granted Add/Modify/Delete/View Registration Payment Accounts permissions. Please see your organizations security policy for further guidance.

6.2 Create a New Payment Account

Once permissions are established in the Calendar the user will then be able to create a payment account.

In order to establish this account go to the Registration tab and click on the Payment: Add link. Upon clicking the Add link, the Add Payment Account Details screen will be displayed. Here you will select PayPal Payflow Pro Payment Gateway from the Payment Gateway drop down list and enter the required information for this account.

All payment gateway accounts require the following information:

- Account Name
- Account Owner
- Account Email Address
- User ID
- Merchant Login ID
- Partner ID
- Password
- Confirm Password
- Allow Recharging of Cards
- Processing Platform
- Accepted Credit Cards
- Comment One
- Comment Two

Optional fields are:

- Current Environment
- Account Status
- Proxy Server Address
- Proxy Server Port
- Proxy Server Login ID
- Proxy Server Password
- Confirm Proxy Server Password

6.2.1 Defaults

The system is set up with some default values. These values are often controlled by who is logged into the calendar when configuring the account. They are as follows:

- The Account Owner and Account Email Address will be defaulted to the user who is currently logged in but can be changed.
- The Current Environment defaults to Live but can be set to development for testing.
- The Account Status defaults to Active but can be changed to Inactive. If the account is set to Inactive, it will no longer be selectable when adding new registration forms.

Once the basic account information is entered, the gateway specific fields will need to be filled out. The gateway specific field for the PayPal Payflow Pro Payment gateway is listed below along with a description of the field based on the current PayPal description.

6.3 Account Fields Matrix

Field	Description	Limitations	Required
User ID	If you set up one or more additional users on the account, this value is the ID of the user authorized to process transactions. If, however, you have not set up additional users on the account, USER has the same value as VENDOR.	Sixty-four (64) alphanumeric, case-sensitive characters.	Y
Merchant Login ID	Your merchant login ID that you created when you registered for the account.	Sixty-four (64) alphanumeric, case-sensitive characters.	Y
Partner ID	The ID provided to you by the authorized PayPal Reseller who registered you for the Payflow SDK. If you purchased your account directly from PayPal, use PayPal.	Sixty-four (64) alphanumeric, case-sensitive characters.	Y
Password	The password that you defined while registering for the account. Limitations:	Six (6) to thirty-two (32) alphanumeric, case-sensitive characters.	Y
Processing Platform	Processing platform selected to handle payment processing.		Y
Proxy Server Address	Proxy server address for servers behind a firewall. Your network administrator can provide the values.		N
Proxy Server Port	Proxy Server Port		N
Proxy Server Login ID	Proxy Server Login ID		N
Proxy Server Password	Proxy Server Password		N

6.4 Assigning Permissions to the Payment Account

The last section of the Account Details screen will allow you to assign permissions to users and groups who can edit this payment account and who can use this account.

Note: To be assigned permissions to edit the payment account, the user or group must have permission to Add/Modify/Delete/View Registration Payment Accounts.

Users/Groups who can Modify/Delete/View Payment Account

Find Available User(s)/Group(s)
Keyword:

User(s)/Group(s) Available
Department, IT
Department, Accounting
Matthews, Paige
Davidson, Mark


User(s)/Group(s) Selected

Users/Groups who can Associate Payment Account to Registration Forms

Find Available User(s)/Group(s)
Keyword:

User(s)/Group(s) Available
Department, IT
Department, Accounting
Matthews, Paige
Davidson, Mark

User(s)/Group(s) Selected



Tip: If you would like to grant a user permission to edit or use this account and they are not showing in the security boxes you will need to update their security permissions to include Add/Modify/Delete/View Registration.

There are two options for assigning permissions to the Payment Account:

- Users/Groups who can Modify/Delete/View Payment Account
- Users/Groups who can Associate Payment Account to Registration Forms

6.4.1 Users/Groups who can Modify/Delete/View Payment Account

When granting permissions to the Users/Groups who can Modify/Delete/View Payment Account area you are granting the ability to change Payment Account information. Users with this level of access can update the Payment Account Details screen.



Security Tip: Limit the amount of Users/Groups that you grant access to this area in order to protect account information and configuration. Please see your organizations security policy for further guidance.

6.4.2 Users/Groups who can Associate Payment Account to Registration Forms

When granting permissions to the Users/Groups who can Associate Payment Account to Registration Forms you are granting the ability to add this payment account to a registration Form/Template.

6.4.3 Adding Users/Groups Permissions

Once it is determined who should have access to the account and who should have access to add the payment gateway you can add users utilizing the Add and Add All arrow.



1. Click the name or group that you would like to grant access
2. Click the Add button
3. The name or group will move to the lower screen Users/Groups Selected granting them access to the respective area.



Tip: You can select multiple users by holding down the Ctrl key on your keyboard and then clicking each name/group. Then click the Add arrow. If you want to add everyone in the list just click the Add All arrow.

6.4.4 Removing Users/Groups Permissions

You can remove permissions just as easily as the Add process by utilizing the Remove arrow.

You can select the user or the group that you wish to remove access from by clicking on the name in the Users(s)/Groups(s) Selected box and then click the Remove Arrow.

You can select multiple people by holding down the Ctrl button on your keyboard and clicking on the users/groups to be removed and then click the Remove arrow.

Note: If you need to remove a user from a Group you will need to consult your Active Data Calendar User Guide for steps on removing users from groups. This guide is available on your Clients Only page or you can call Active Data Support.

Once you have completed granting permissions as needed, confirm the payment account settings are correct and click the Save button to save the account.

7.0 View Payment Accounts

7.1 List Accounts

Once your payment accounts are configured in Calendar you are able to view a list of what is available.

From the Administrative area of Calendar click on the Registration tab and then on the gray bar next to the Payment option click View. You will receive a listing of accounts that are configured in the system depending on your permissions to the account.

Gateway	Payment Account Name	Account Owner	Form(s) w/Account	Status
PayPal Payflow Pro	PayFlow Pro QA Gateway 1	admin admin12	3	Active
TouchNet	QA Instance TouchNet Processor	admin admin12	1	Active
TouchNet	TouchNet Test Account 20100824	admin admin12	1	Active

7.1.1 View Available vs. View My Accounts

On the View Payment Accounts screen you have the option to View Available accounts or to View My Accounts. By clicking the radio button for the desired option you will be able to change the display on the screen.

- **View Available Accounts** – Allows you to see the configured payment accounts that you have permission to.
- **View My Accounts** – Allows you to see the accounts that you have created

Note: If you are being told that you have access to a payment account but it is not available in your list of accounts the creator/administrator of the account will need to check the configuration of the account to verify that you have the proper permissions to the account.

7.2 View Account Details

Active Data Calendar gives you the ability to view the details of the established accounts in the system. Once you are at the account list click on the Payment Account Name to view the details of that account.

This screen will allow you to view the details but will not allow you to modify the information in this location.

Note: Having permission to add an account to a registration form does not grant you ability to view the account on the Payment Accounts list.

Payment Account Information

*Account Name: PayFlow Pro QA Gateway 1 Form(s) w/Account: 3
*Account Owner: Matthews, Paige Created By: Matthews, Paige
*Account Email Address: PMatthews@YourOrganization.com Created On: 9/16/2012 9:12:48 AM
Current Environment: Development Modified By: Matthews, Paige
Account Status: Active Modified On: 9/16/2012 10:18:24 AM

PayPal Payflow Pro Information:

*User ID: ADXPayments
*Merchant Login ID: ADXPayments
*Partner ID: PayPal
*Password: *****
*Allow Recharging of Cards: Yes
*Processing Platform: First Data Merchant Services (FOMS) Nashville
*Accepted Credit Cards: Visa, Master Card, American Express, JCB
*Comment One: Event Name
*Comment Two: Custom Field 1
Proxy Server Address:
Proxy Server Port:
Proxy Server Login ID:
Proxy Server Password:

Users/Groups who can Modify/Delete/View Payment Account

Users/Groups who can Associate Payment Account to Registration Forms

8.0 Modify/Delete Payment Accounts

Once an account is created you are given the option to modify or delete the account if necessary.

8.1 Modify a Payment Account

Modifying a payment account allows you to update all/any payment information.

From the administration area of Calendar

- Click on Registration, then click on Modify/Delete on the gray bar next to Payment
- Select the payment account you wish to modify from the drop down list.
- Modify should already be selected but if it is not click on modify.
- Click the submit button

You will receive the Modify Payment Account Details screen.

The current settings of the payment account will display allowing you to modify information as required.

Note: Once the form is used you will be unable to modify the Payment Gateway name.



Security Tip: Note the Password fields on the Modify Payment Account Details screen. If your organization requires passwords be changed in set time patterns you may need to modify your account with the new password. The same applies to Payflow Pro. Please confirm with your organization on their security policy and how this will apply to your Payment Account.

Once you have completed modifying your Payment account click the Save button to save the changes.

8.2 Delete a Payment Account

You are able to delete a payment account from the administration area of Calendar.

Once a payment account is utilized in an event (past and/or future) you WILL NOT be able to

delete the payment account from your Calendar. The inability to delete accounts once they are used is due to the need to maintain paper trails regarding payments/refunds and discounts.

If an account was not used you can delete the account by following the below steps:

- Click on Registration
- On the gray bar next to payment click Modify/Delete
- Select the payment account you want to delete.
- Click the Delete radio button and click submit

The account will be removed from your Calendar.

Note: When you select the account you wish to delete, the delete button will gray out if that account is used in an event in the calendar.

9.0 Payment Forms/Templates

Once a payment account has been configured you can now associate that account with a registration form.

9.1 Adding Payment Account to a Registration Form

To add the payment account to a registration form, you will need to click on the Registration tab and then on the gray bar next to forms click on the Add option.

9.2 Step 1: General Details

A form name is required and Registration Form with Payment must be selected for the form type.

You will then have options to add security to the registration form:

- **Users/Groups to Assign Form to Events** – These are users that can select the form for use in an event.
- **Users/Groups to Receive Registration Emails** – These are the people that will receive emails when someone registers for an event.
- **Users/Groups to process Form Registrants** – These are the users that can log into the system and approve/deny/cancel/modify registrants.
- **Users/Groups who can Modify/Delete Registration Form** – These are the people that can change or delete the form.

Select the user(s)/group(s) that you wish to grant access to. Use the Add, Add All and Remove arrows by selecting a users name and clicking the appropriate arrow to grant/remove access. These steps

should be repeated for each of the four (4) areas in order to complete permissions. You may select multiple users by holding down the Ctrl key and clicking on each name. Then click the Add or Remove arrow to grant or remove access to each user/group at once. Once selections have been made click next to continue the form setup.

9.3 Step 2: Form Customization

On step 2, you will be able to select what payments are associated with the form. You can select to associate a PayPal account, credit card payment account and/or to accept checks or cash.

The screenshot shows a form titled "Form Name: Payflow Pro Payment Form". It includes a "PayPal Account:" dropdown menu with "Select" as the current choice. Below it is a "Payment Account:" dropdown menu with "PayPal Payflow Pro - PayPal Payflow Pro Paymer" selected. There are two checkboxes: "Accept Checks:" and "Accept Cash:", both of which are currently unchecked.

Note: The payment accounts added for the PayPal Payflow Pro payment gateway will be displayed under the credit card payment account drop down.

This screen is also where you can configure custom text for the emails that go out with this registration form.

Options in this area are:

- **Customize Form Text**
- **Customize Email Text**
- **Customize Form Buttons**

9.3.1 Customize Form Text

- Text to appear at top of form
- Text to appear at bottom of form, above buttons
- Text to appear on preview/payment selection screen
- Text to appear on final confirmation page if payment approved
- Text to appear on final confirmation page if payment declined
- Email Opening text
- Email Closing text
- Send Emails from

The screenshot displays the "Form Text" customization interface. It is divided into two main sections: "Form Text" on the left and "Email Text" on the right. The "Form Text" section includes fields for "Text to appear at top of form:", "Text to appear at bottom of form, above buttons:", "Text to appear on preview/payment selection screen:", "Text to appear on final confirmation page if Payment Approved:", and "Text to appear on final confirmation page if Payment Declined:". Below these are "Form Buttons" with a list of buttons (Submit, Back, Finish, Reset, Cancel, Credit Card, Check, Cash) and a "Browse..." button for each. The "Email Text" section includes a "Select Email:" dropdown, "Email Opening Text:", "Email Closing Text:", and "Send emails from:". At the bottom, there are "CANCEL", "BACK", "NEXT", and "FINISH" buttons.

9.3.2 Customize Email Text

You can customize the information that is sent to the people registering events by changing/updating text that appears in the confirmation emails and other emails they receive.

If you click the drop down arrow next to select email you can select which email you would like to customize.

Then use the Email Opening Text, Email Closing text and send emails from options to customize the communications.



Security Tip: When customizing emails always be aware of how much information you provide to the person receiving the email. It is a general rule of thumb to never enter account numbers, passwords, or other detailed information about you and/or your organization. Check with your organization for security policies and procedures that address email information and what their recommendations are.

9.3.3 Customize Form Buttons

You can utilize different images for your form Buttons. If your organization uses a specific scheme through the site you can incorporate that into your calendar configuration. Files uploaded in the Customize Form Buttons area will replace the standard buttons with your graphics.

Once the customization is complete you can move on to what fields you would like the registrant to complete.

9.4 Step 3: Registration Fields

The final step in configuration a registration form is choosing what registration fields you would like to have the registrant fill in. Included on this page are the following fields:

- All Standard Contact Fields (Domestic)
- All Standard Contact Fields (International)
- Company
- Job Title
- Address (Domestic or International)
- Phone
- Fax
- Any additional fields as configured
- The option to make fields required is controlled by the required check box. See the section on Additional Fields below for further details.

Add Form - Registration Fields Step: 1 2

Form Name: PayFlowPro Document Form

Standard Contact Fields

☐ All Standard Contact Fields (Domestic)

☐ All Standard Contact Fields (International)

First Name: Default Field (Required)

Last Name: Default Field (Required)

Email: Default Field (Required)

☐ Company ☐ Required

☐ Job Title ☐ Required

☐ Address ☐ Required

☐ Domestic ☐ International

Address 1 Address 1
Address 2 Address 2
City City
State State/Province/Prefecture
Zip/Postal Code Zip/Postal Code
Country Country

☐ Phone ☐ Required

☐ Fax ☐ Required

Additional Fields

Select the field type and then you will be prompted to make additional selections and/or enter field labels in order to continue building your form.

Field Type: Select

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You can now click Finish. The registration form is now available for use in Calendar events according to the security set on the form.

9.4.1 Note on using “All Standard Contact Fields (Domestic/International)”

The Add Form – Registration Fields screen provides you with the option to utilize all standard contact fields for either Domestic or International. Upon selecting these check boxes the other field options will become unavailable (gray) and only the Additional Fields are still configurable.

With these options selected the Address field will not be “required”. If you need to make the address field required it is suggested that you do a manual checkbox selection

Add Form - Registration Fields Step: 1 2

Form Name: Test Form for Address Required

Standard Contact Fields

☒ All Standard Contact Fields (Domestic)

☐ All Standard Contact Fields (International)

First Name: Default Field (Required)

Last Name: Default Field (Required)

Email: Default Field (Required)

☐ Company ☐ Required

☐ Job Title ☐ Required

☐ Address ☐ Required

☐ Domestic ☐ International

Address 1 Address 1
Address 2 Address 2
City City
State State/Province/Prefecture
Zip/Postal Code Zip/Postal Code
Country Country

☐ Phone ☐ Required

☐ Fax ☐ Required

Additional Fields

Select the field type and then you will be prompted to make additional selections and/or enter field labels in order to continue building your form.

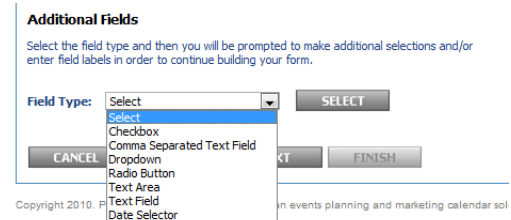
Field Type: Select

and use the required option instead of utilizing the All Standard Contact Fields options.

9.5 Additional Fields

When creating a Payflow Pro form you have the option of adding Additional Fields to your form. These field options are:

- Checkbox
- Comma Separated Text Field
- Dropdown
- Radio Button
- Text Area
- Text Field
- Data Selector



***Note:** It is recommended that a text field be used if you are going to use an Additional Field to pass more information to PayFlow Pro.

9.5.1 Checkbox

If you would like to add an additional checkbox to your form click the drop down arrow and select checkbox from the menu. Click the Select button. You will receive the Checkbox Field Type configuration screen. Here you will be able to set the following:

- Field Label – Shows on the registration form as the question or statement that we require a response to.
- If they are required to respond – determines if they are required to respond to this question or not.
- Field Identifier – Is the name for the field on the form.
- Checkbox Selection Options – Allows you to enter responses that they will be able to select from.
- Allow Write in Response – Allows registrants to type in their own response to the question.
- Selection Display – Determines if you want to show the answer options horizontal or vertical.
- Number per row – Determines how many check boxes show per row on the form.
- Field only available from registrant administration area – Makes this field available in the administration area only. Registrants will not see the field but when working with registrants from the administrative side of Calendar the administrator will see the field.

In the below example we are asking if the registrant will require disability assistance.

We selected as follows:

- Field Label = Disability Assistance Required?
- Field is not required
- Field Identifier = Disability Assistance
- Checkbox Selection Options = Yes or No
- Allow Write-In = No
- Selection Display = Horizontal
- # Per Row = 2
- Field is available on the form.

Upon clicking preview we receive to the right what the check boxes will look like on our form.

Changing the Checkbox Selection Options or if you want the fields displayed horizontally or vertically and the number per row will impact how this field appears.

Below we ask again if they will require assistance on we changed the settings.

If we allow a Write-In Response we will be asked for a field label. We entered "Other" as our field label.

Allow Write-In Response: ☐ No ☒ Yes
Field Label for Write-In Response:

When Previewed our check box now displays:

Disability Assistance Required?
☐ Yes ☐ No
☐ Other

If we change the field to display Vertical, when previewed our check box now displays with the boxes on top of each other.

Disability Assistance Required?
☐ Yes
☐ No
☐ Other

Cost for the Selected Event(s): \$999.99 USD
Discount Code:
Final Cost of Event(s): \$999.99 USD
Payment Type(s): Credit Card

*First Name: *Last Name:
*Email Address:
*Company:
*Address 1:
Address 2:
*City:
*State: *Zip/Postal Code:
County:

Disability Assistance Required?
☐ Yes ☐ No
☐ Other

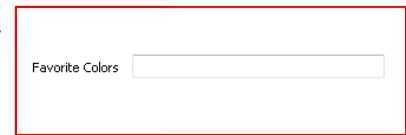
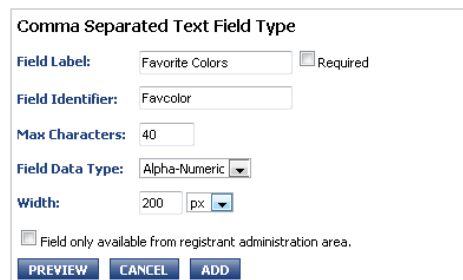
Please verify that you have completed all required fields above and then use the buttons below to either submit your registration request or you may cancel out of this registration process.

The custom fields appear at the bottom of the registration form. If this field were required, it would display with a red asterisk next to the field name.

Regardless of the type of custom field created it appears at the bottom of the form. You are not limited to the amount of custom fields that you can have on your form.

9.5.2 Comma Separated Text Field Type

A Comma Separated Text Field is very similar to the Text Area/Text Field options (discussed a little later in this document) in that it allows you to enter free form text. The difference is this field is helpful when planning on exporting data from the calendar that has to do with this event and/or registrants. You are able to add commas between the field and upon export to a CSV (Comma Separated Values) file you will receive a new column for each place that a comma displays.



In this example we are asking registrants to tell us what their favorite color is. The configuration of the field is on the left with a preview of the field on the right. You can control:

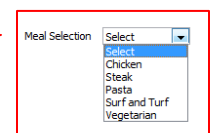
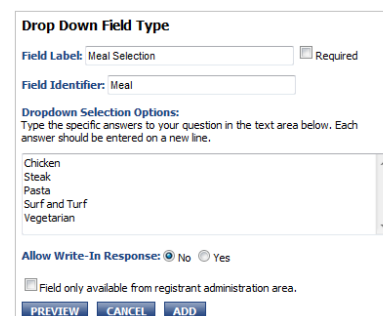
- Field Label – Name of the field as it appears on your form
- If the field is required – Whether or not an answer must be entered
- Field Identifier
- Max Characters – The number of Characters registrants can enter into your field
- Field Data Type – Alpha-Numeric, Alpha, Numeric
- Width of the field – how long the box is ***Note:** in a Comma Separated text field you are unable to control the height of the box.
- If the field is available from the administration area of calendar or on the form where the registrant can see it.

9.5.3 Drop Down Field

The drop down field is used to create a selection box on your form. This field is used for selecting one option out of a list.

In this example we are asking for a menu selection. They can choose chicken, Steak, Pasta, Surf and Turf or a Vegetarian meal. Utilizing the drop down box allows us to give them options while limiting the user to select one option from the list.

The Drop Down box gives you a compact way of making a selection based on your options.



This example shows how to configure the field as well as how it will appear on the form.

As with the other fields you will need to give your field a label and an identifier. The difference is that the selection items in this box must appear on their own line in order to display properly in your drop down box. Note above how each menu selection is listed below the other. You simply type in your first selection, press the enter key and type in your next selection and repeat until all options are listed.

You are not limited to one word answers or to the amount of space showing on the field configuration. Note the scroll arrow to the right of the box. You are able to have several options and they can be more than one word.

You will need to provide the following pieces of information to configure the Radio Field:

- Field Label – Names your field
- Field Identifier – Name of your field in the database
- Dropdown Selection Options – The items you would like the registrant to select from.
- Allow Write-In Response – A field that allows the registrant to enter custom information.
- Field available to registrant or only in administration area. – controls if the field appears on the form or if it is displayed in the administration area of the form only.

9.5.4 Radio Button

The Radio Button option works much like the drop down list in that you can present your registrants with a selection of options. In the below example we again utilized the idea of a menu selection. We show the configuration as well as the preview of the field.

Below is the preview if you select Vertical with 2 per column.

You will need to provide the following pieces of information to configure the Radio Field:

- Field Label – Names your field
- Field Identifier – Name of your field in the database
- Radio Selection Options – The items you would like the registrant to select from.
- Allow Write-In Response – A field that allows the

registrant to enter custom information.

- Selection Display – controls horizontal or vertical display of your field.
- # Per Row/# per Column – controls how many options are presented in each row or column of your display
- Field available to registrant or only in administration area. – controls if the field appears on the form or if it is displayed in the administration area of the form only.

9.5.5 Text Area

The Text Area allows you to create a free form text area where registrants can enter information. In the below example we are asking what certifications the registrant has. We created a 150x50 box and limited the registrant to 50 Alpha-Numeric characters.

Based on the selected field data types registrants can enter whatever information necessary and submit their registration with that custom text.

You will need to provide the following pieces of information to configure the Text Area Field:

- Field Label – Names your field
- Field Identifier – Name of your field in the database
- Max Characters – Controls the number of characters the registrant can enter.
- Field Data Type Options for the Field Data Type are:
 - Alpha-Numeric
 - Alpha
 - Numeric
- Width of the box
- Height of the Box
- Field available to registrant or only in administration area. – controls if the field appears on the form or if it is displayed in the administration area of the form only.

9.5.6 Text Field

The Text field is similar to the Text Area in that the registrant can enter custom text however in the field you are

limited to the width and are unable to control the height of the field. The same options of Alpha-Numeric, Alpha or Numeric still apply.

- Field Label – Names your field
- Field Identifier – Name of your field in the database
- Max Characters – Controls the number of characters the registrant can enter.
- Field Data Type Options for the Field Data Type are:
 - Alpha-Numeric
 - Alpha
 - Numeric
- Width of the box
- Field available to registrant or only in administration area. – controls if the field appears on the form or if it is displayed in the administration area of the form only.

9.5.7 Date Selector

The Date Selector allows registrants to select dates that they wish to attend your event. In the below example we are offering a Guitar Workshop where registrants can choose which day they wish to attend the workshop. You control the dates you wish to make available.

The field information is as follows:

- Field Label – This is the label of the field that appears with the entry box on your form
- Field Identifier – Gives the field its own name that is used in the database.
- Start/End Dates – The dates available for selection
- Field availability box – Allows you to show the field on the customer form or have it show on the administrative side only.

Upon clicking on the Calendar icon to the right of the field the registrant will see the available dates and all other dates will be crossed out and unable to be selected as shown below.



9.6 Enable Registration on an Event

At this point, events that are going to require payment through a payment account can be entered. A user will create an event and enter the proper information in steps one, two, three and four.

Note: Further details about creating events are available in the Active Data Calendar User Guide available on your Clients Only page.

On step five, you will be able to enable registration by clicking the Enable Registration box. Select a payment form for the event by clicking the drop down arrow and selecting the desired form. You can then configure the Maximum Registrants, Registration Deadline, if you would like to display spaces available and what text to show if no spaces are available. Event Cost then needs to be entered and any Discounts available.

Finish the submission process for the event to make your event available as specified.

9.7 Registration Form

The new event will now display on the appropriate calendars and is ready for user registration. The options chosen while setting up the registration form will determine what the user will be required to fill out.

In this example a basic registration form has been used that requires a registrant name and email address and optionally allows them to fill in company, address and other contact information. These additional fields can be set to be required in any combination when setting up the form but the registrant name and email address is always required.

Event Registration Form - Confirmation

This screen allows you to preview your registration submission one final time before selecting your payment method. We encourage you to print out this screen for your records. You will also receive an email notification with your registration information once you finalize payment and are approved for the event. Your registration submission is not complete until you finalize your payment and receive a final approved confirmation screen and approval email.

You have selected to register for the following event(s).

Event Details

Senior Pizza Party (\$5.00 USD)
 Start Date: 9/30/2011 End Date: 9/30/2011
 Start Time: 12:00 PM End Time: 5:00 PM

Event Cost: \$5.00 USD

Registration Details

First Name: Mark
 Last Name: Davidson
 Job Title:
 Email Address: MDavidson@YourOrganization.com
 Company: Your Organization
 Address 1: 190 Broadhead Road
 Address 2: Suite 300
 City: Bethlehem
 State: PA
 Zip/Postal Code: 18017
 County: Northampton
 Phone Number: 610-997-8100
 Fax:

*Please select from one of the following payment options.

Note: Required fields are noted by a red asterisk next to the field name.

Once the registrant has filled out the required and any optional information they choose they click submit.

This will take them to the Event Registration Form Confirmation screen (pictured below). This screen is a Summary of their registration and will give them an option for payment based on what was selected in the creating payment form process. It will also provide the total cost of the registration.

In this case we gave them an option to use a credit card, check or cash as their forms of payment.

9.7.1 Cash or Check

If Cash or Check is selected they will receive a screen confirming that they have completed the registration process. This screen will ask

them to maintain a copy for their records and will advise them to expect a follow up email with approval or denial of the registration by default. If the confirmation screen text had been customized when the registration form was configured then the custom text should be displayed on the confirmation screen.

9.7.2 Credit Card

If the Credit Card button is clicked, a form will show that will gather all of the data required to process their payment. This is the Event Registration Form – Credit Card Payment screen.

The event details along with final cost are displayed and they are prompted for the necessary information to complete the transaction.

The billing information will be defaulted from what was entered on the registration form. The registrant can then change any of the fields to match their billing information for the credit card they are using to pay for their registration.

Once they have entered all of their information, their credit card will be processed. If successful, our standard receipt will display. If any errors are encountered, we will display them on this form and allow the registrant to fix them and submit their payment for processing again.

Event Registration Form - Credit Card Payment

Please enter your payment information and click Pay Now. Once your payment has been processed you will receive a final approval confirmation screen and an approval email.

Senior Pizza Party (\$5.00 USD)
 Start Date: 9/30/2011 End Date: 9/30/2011
 Start Time: 12:00 PM End Time: 5:00 PM

Final Cost: \$5.00 USD

Billing Information

*First Name: Mark
 *Last Name: Davidson
 Company: Your Organization
 *Address 1: 190 Broadhead Road
 Address 2: Suite 300
 *City: Bethlehem
 *State: PA
 *Zip: 18017
 *Country: United States
 Phone Number: 610-997-8100
 Email Address: MDavidson@YourOrganization.com

Credit Card Information

*Card Type: Visa
 *Card Number:
 *CVV2 Code:
 *Expiration Date: 01 / 2014

Event Registration Payment Form - Receipt

Event Registration - Thank You!

Your registration and event payment has been approved! You will receive an email shortly with the details of your registration. Please save the email for future reference and in case you need to cancel your event registration submission.

Thank you for your participation and we look forward to seeing you at the event!

Payment Information

Event Name: PayPal Payflow Pro Payment Event
 Registrant Name: Registrant, Event
 Payment Date: 7/6/2012
 Payment Amount: \$5.00 USD
 Transaction ID: 7K423225N754825F

After the registrant has completed paying through the credit card checkout form, a receipt will be displayed which includes their registration information along with the amount they paid and a transaction id for the payment. This Event Registration Payment Form Receipt is shown below.

10.0 Registrant Administration

Once a registrant is in the system, they can be viewed and modified from the administration area.

10.1 View Events with Registration

A user with the proper permissions will be able to click on the Registration tab and then on the gray bar click on the Registrants: Active link to view events with registration.

This screen will show all events with registration in the time period specified at the top of the page for all departments.

Department can be at Select for all departments or you can specify a department to narrow your search.

Search to view a

You are able to specify Select for Department or select a specific department by clicking the down arrow and selecting from the list of departments that are configured in your calendar system.

Event Start Date	Event Name (+ ADD Registrant)	Maximum Registrants	Pending Registrants	Approved Registrants	Denied Registrants	Cancelled Registrants	Action
9/30/2011 12:00 PM	(+) Senior Pizza Party	200	2	0	0	0	Disable Download

Once the desired criteria are selected you will need to click the Search button to show the results.

You will now receive a list of all items that meet the department and date specifications. From this screen you can see the event details.

From this screen you can view registrants in any status (Pending, Approved, Denied, and Cancelled), Add Registrants and view Maximum Registrants for each event.

10.2 View Registrants

You can view each registrant individually and make any modifications to them as needed by simply clicking on the number located under the desired column. For example, in the above image you can see there are 2 pending registrants. If you click on the 2 you will receive the Manage Pending Event Registrants screen where you can perform other functions associated with the registration.

Further details on modifying registrants are available in the Active Data Calendar User Guide located on your Clients Only page. Modifying registrants that have used a

Event Details: Senior Pizza Party, Start Date: 9/30/2011, Start Time: 12:00 PM, End Time: 5:00 PM, Event Cost: \$5.00 USD, Total Current Revenue: \$0.00 USD, Payment Type(s): Credit Card, Check, Cash.

Pending Registrants: 2 Pending Registrants. There are 200 registration spaces remaining for this event.

Email	Change Status	Name	Registrant Email	Registration Date/Time	Action
<input type="checkbox"/>	<input type="checkbox"/>	Davidson, Mark	MDavidson@YourOrganization.com	9/20/2010 11:18 AM	Select
<input type="checkbox"/>	<input type="checkbox"/>	Davidson, Mark	MDavidson@YourOrganization.com	9/20/2010 11:19 AM	Select

SELECTED: ☐ Approve ☐ Deny ☐ Delete ☐ Cancel ALL: ☐ Approve ☐ Deny ☐ Delete ☐ Cancel SUBMIT

credit card via the Payflow Pro process will be explored further below.

10.3 Registrant Adjustments

The modification process allows for adjustments to a registration (including partial refunds).

Issuing a credit will work the same way as is outlined in the Active Data Calendar user guide where it will allow the selection of crediting back only now you will be able to select a check box if the credit is to be issued back to the registrants' credit card.

With Payflow Pro the payment adjustment process will allow for further options when working with an event registrant. There are three options the administrator will have when processing a payment adjustment.

1. **Charge the registrant's original credit card** - This will not require the administrator or registrant to provide any credit card information as it has been stored in PayPal's system. The adjustment amount will be charged to the original credit card and a receipt will be sent to the registrant.
2. **Enter the credit card information to charge** - When you select this option, you will be sent to the secure credit card checkout form and be required to enter the registrants' credit card information for processing.
3. **Do not charge a credit card and have the adjustment be in the calendar system only** - This is the way the system works without Payflow pro established as a gateway. This is the default selection for the payment adjustment option.

The registrant modification process will allow you to choose if you want to bill a credit card for a payment adjustment or use a different form of payment.

There will be two ways you can bill a credit card if chosen.

1. **Bill the original credit card using reference transactions.** This process will allow the administrator to bill additional amounts to the original credit card without reentering the credit card information. This process is turned off by default and can only be turned on by an account administrator on the PayPal side.
2. **Enter new credit card information through the credit card checkout form.** The administrator will need to get the information from the registrant in order to process the payment.

Note: If a registrant paid with a credit card you will see the Issue a Credit to the Registrant's Credit Card Account check box once the Credit Radio button is selected.

Event Details
PayPal Payflow Pro Payment Event
Start Date: 7/29/2012
Start Time: 8:30 AM End Time: 10:30 AM
Event Cost: \$200.00 USD
Total Current Revenue: \$200.00 USD
Payment Type(s): PayPal, Credit Card

Registrant Details
*First Name: Event *Last Name: Registrant
*Email Address: Support@ActiveDataX.com
Company: Active Data Exchange, Inc. Job Title:
Address 1: 190 Broadhead Rd
Address 2:
City: Bethlehem
State: PA Zip/Postal Code: 18017
County: Northampton
Phone Number: 610-997-8100 Fax: 610-866-7899

Payment Details
Payment Method: ☒ Payment ☐ Credit
☒ Charge original card for adjusted amount.
☐ Enter credit card information for adjustment.
☐ Do not charge credit card for adjustment.
☐ Issue a Credit to this Registrant's Credit Card Account
Adjustment Amount:
Notes on Payment:
Payment Method: Credit Card
Payment Account: PayPal Payflow Pro - PayPal Payflow Pro Payment Account
Occurrence Paid: \$200.00 USD
Total Amount Paid: \$200.00 USD
Occurrence Discounts Applied: None
Total Discounts Applied: None
Transaction Approved: 7/6/2012 11:46:39 PM
Transaction ID: 7K4423225N754825F
Total Adjustments Applied: None

Action:



Security Tip: Remember the Notes box is provided for documentation if desired but you should not enter credit card or other personal information in this box. Check with your organizations security team on the policy and procedure for documentation and personal information.

s/credits on
will see a box at
ws
ctions. This
e Payment
ed here:

Payment Details

☒ Payment ☐ Credit

Adjustment Amount:

Notes on Payment:

Payment Method: Check
Occurrence Paid: \$2.50 USD
Total Amount Paid: \$2.50 USD
Occurrence Discounts Applied: None
Total Discounts Applied: None
Transaction Approved: 9/20/2010 11:18:14 AM
Transaction ID: F5434452BE42039AB764
Total Adjustments Applied: \$-2.50 USD

Date	Type	Amount
9/20/2010 2:24:22 PM	Payment	\$2.50 USD
9/20/2010 2:25:18 PM	Partial Credit	\$5.00 USD

10.4 Add a Registrant

There may be cases where someone calls your organization or arrives on site and request to be registered for an event. In this situation you can process the registration for them utilizing the administration area of the Calendar. You will need to enter the registrants' information which will be required on both the Calendar and credit card checkout forms.

To add a registrant to an event, go to the Registration tab. Once on the tab click on Active next to the Registrants option. Specify the date time frame and click search. Once you find the event that you will need to add someone to, click the plus sign next to the name of the event. Clicking the plus sign will bring you to an Add Event Registrants screen.

Manage Event Registrations

1 Total Events with Active Registrations

Department:

From Date: To Date:

Event Start Date	Event Name (+ ADD Registrant)	Maximum Registrants	Pending Registrants	Approved Registrants	Denied Registrants	Cancelled Registrants	Action
9/30/2011 12:00 PM	<input type="button" value="+"/> Senior Pizza Party	200	0	1	0	1	Disable Download

Remember the fields with a red asterisk are required.

Fill in the amount of information the registrant provides to you. Click the Submit button.

The system will now take you to an Event Registration Credit Card Form. This form will automatically take on the information provided on the Add Event Registration form. This screen will require the credit card information that will be passed to the Payflow Pro gateway for processing.

Add Event Registrants

[Back to List of Registrations](#)

Event Details

Senior Pizza Party
Start Date: 9/30/2011
Start Time: 12:00 PM End Time: 5:00 PM
Event Cost: \$5.00 USD
Total Current Revenue: \$0.00 USD
Payment Type(s): Credit Card, Check, Cash

Registrant Details

*Status:

*First Name: *Last Name:

*Email Address:

Company: Job Title:

Address 1:

Address 2:

City:

State: Zip/Postal Code:

County:

Phone Number: Fax:

Payment Details

☒ Register as No Cost Registrant (\$0.00 USD)
☐ Register with Payment

Select Payment Method:

Amount Paid:

Notes on Payment:

Once you have completed the Credit Card checkout, the registrants' card will be charged for the transaction. The registrant will show in the system as a paid registrant.

Event Registration Form - Credit Card Payment

Please enter your payment information and click Pay Now. Once your payment has been processed you will receive a final approval confirmation screen and an approval email.

Senior Pizza Party (\$5.00 USD)
 Start Date: 9/30/2011 End Date: 9/30/2011
 Start Time: 12:00 PM End Time: 5:00 PM

Final Cost: \$5.00 USD

Billing Information

*First Name:
 *Last Name:
 Company:
 *Address 1:
 Address 2:
 *City:
 *State:
 *Zip:
 *Country:
 Phone Number:
 Email Address:

Credit Card Information

*Card Type:
 *Card Number:
 *CVV2 Code:
 *Expiration Date: /

10.5 Cancel a Registrant

There may be times it is necessary to cancel a Registrant.

10.5.1 Cancelling while Performing Manual Entry

Cancelling a Registrant as you are entering them is accomplished by clicking the cancel button prior to confirming them on the credit card payment screens. Click Cancel will take you back to a blank Add a Registrant screen with a message on the screen that states "Your Payment for this Event has been cancelled". This will happen as long as the payment wasn't confirmed and completed on the Credit Card checkout.

10.5.2 Cancelling when Already Paid

Active Data Calendar provides you the ability to cancel registrants and refund payments utilizing the administration of Calendar.

- Click on the Registration tab and then on the gray bar click on Registrants: Active.
- Set search criteria so that you can see the event in the list.
- In the Active Registrants column click on the number to view the registrants for the event.
- Locate the person you wish to cancel and refund
- Click the drop down arrow and select Cancel
- On the Registrant Details screen type in the amount of the refund
- In the upper right Select Yes for "Are you sure that you want to cancel the registrant below?"

Manage Approved Event Registrants

Event Details
 Senior Pizza Party
 Start Date: 9/30/2011
 Start Time: 12:00 PM End Time: 5:00 PM
 Event Cost: \$5.00 USD
 Total Current Revenue: \$0.00 USD
 Payment Type(s): Credit Card, Check, Cash

Approved Registrants
 1 Approved Registrants
 There are 199 registration spaces remaining for this event.

Email	Change Status	Name	Registrant Email	Registration Date/Time	Registration Number	Action
<input type="checkbox"/>	<input type="checkbox"/>	Davidson, Mark	MDavidson@YourOrganization.com	9/20/2010 11:18 AM	H8C81A-8C7C1-118FDB	<input type="button" value="Select"/> <input type="button" value="Cancel"/> <input type="button" value="Modify"/> <input type="button" value="View"/>

SELECTED: ☐ Approve ☐ Deny ☐ Delete ☐ Cancel ALL: ☐ Approve ☐ Deny ☐ Delete ☐ Cancel

- Click Submit
- You will receive a message that the Registrant was successfully cancelled.

After a registrant has been canceled, the payment information will be updated under the cancelled registrants' area and the amount refunded will be displayed. The refund process will follow the current rules and the administrator will be responsible for selecting if the payment is refunded to the credit card or not.

Registrant Details

Are you sure that you want to cancel the registrant below?

☒ No
 ☐ Yes

[Back to List of Registrations](#)

Event Details

Senior Pizza Party

Start Date: 9/30/2011
 Start Time: 12:00 PM End Time: 5:00 PM
 Event Cost: \$5.00 USD
 Total Current Revenue: \$0.00 USD
 Payment Type(s): Credit Card, Check, Cash

Registration ID Number: H8C81A-8C7C1-118FDB

Registration Last Updated: 9/20/2010 2:26 PM

Registration Last Updated By: admin12, admin

Registered Date: 9/20/2010 11:18 AM

Current Status: Approved

Action:

Registrant Information

First Name: Mark

Last Name: Davidson

Email: MDavidson@YourOrganization.com

Company: Your Organization

Title:

Address 1: 190 Broadhead Road

Address 2: Suite 300

City: Bethlehem

State: PA

ZIP/Postal Code: 18017

County: Northampton

Phone: 610-997-8100

Fax:

Payment Details

***Refund Amount:**

Notes on Payment:

Payment Method: Check

Occurrence Paid: \$0.00 USD

Total Amount Paid: \$0.00 USD

Occurrence Discounts Applied: None

Total Discounts Applied: None

Transaction Approved: 9/20/2010 11:18:14 AM

Transaction ID: F5434452BE42039AB764

Total Adjustments Applied: \$-5.00 USD

Date	Type	Amount
9/20/2010 2:24:22 PM	Payment	\$2.50 USD
9/20/2010 2:25:18 PM	Partial Credit	\$5.00 USD
9/20/2010 2:26:17 PM	Full Credit	\$2.50 USD

11.0 Active Data Calendar Help and Support

If you have any questions or require assistance with the Calendar application please contact Active Data Exchange Support:

- Email: Support@ActiveDataX.com
- Phone: 610-997-8100

12.0 Glossary of Terminology

Below you will find definitions for commonly used terms in Active Data Calendar.

12.1 Account – An account is made up of the combined user information, including a Login ID and password, which is added to Active Data Calendar to allow users to login and use the calendar product.

- **User level account** – This account role can log into the calendar and perform functions. Key information for this account level:
 - Add, update, and delete events within their associated department.
 - When adding and updating events to the calendar this user will require an administrator within their department or a Super User to approve the events.
 - This level can also update their login information.
- **Administrator level account** – A department often has an administrator assigned to it. Key information for this account level:
 - This account role can add, update, and delete events in their associated department.
 - Events added by an Administrator will automatically post live to the calendar.
 - They may also process pending events from the “User” level accounts in their department.
- **Super User level account** – The Super user level account is created at the time of the install of Active Data Calendar. Key information for this account:
 - Provided to your organization
 - Performs any function within the calendar product
 - Primarily used to setup the initial configuration and framework of the calendar
 - Only account that can add other administrative user accounts
 - Receives notifications to process any events pending approval
 - Can process any other event inside the Calendar regardless of Department or Locked Category status.

12.2 Category – A category is used to group events and help people using your calendar find events more efficiently.

- Events can be displayed by category when viewing the calendar.
- Categories are not specific to a department.
- Categories are available to all users of the calendar.

12.3 Department – A department is used to group people together.

- Groups Administrative and Users accounts
- Uses logical groupings by work function/responsibilities
- Examples include but are not limited to “Human Resources”, “Marketing”, “Admissions”, “Student Services”, etc.

12.4 Event – An event is a gathering/occasion on your calendar.

- Combines date, time and details of a scheduled meeting, concert, sports, dinners, fund raisers, etc.
- All users of the calendar can add, update and delete events.

12.5 Payment Gateway Company/Organization that provides payment processing

12.6 Payment Account An account setup under a payment gateway that contains information about how to connect to the payment gateway and provide information required by the payment gateway.

12.7 Processing Platform PayPal Payflow Pro connects to processing platforms in order to process credit card transactions. Based on which processing platform is used, certain additional parameters can be set. The list of processing platforms is as follows:

- PayPal
- American Express Phoenix
- American Express Brighton
- First Data Merchant Services (FDMS) Nashville
- First Data Merchant Services (FDMS) North
- First Data Merchant Services (FDMS) South
- First Data TeleCheck
- Global Payments Central
- Global Payments East
- Merchant e-Solutions
- Elavon (Formerly Nova)
- Paymentech Salem (New Hampshire)
- Paymentech Tampa
- TSYS Acquiring Solutions (Formerly Vital Processing Services)
- Moneris Solutions

12.8 Pending Event – An event waiting to be approved by an Administrator or the Super User

- All user level accounts must have events the submit/update approved
- Until the event is approved it is placed in pending status.

12.9 LDAP – Stands for Lightweight Directory Access Protocol. It is an Internet protocol that email and other programs use to look up information from a server.

12.10 Location – A location is used to allow for a “quick list” of physical locations to be used when adding events. There are three (3) divisions in Locations:

- Locations – Main locations and/or areas where buildings are clustered
- Buildings – Physical buildings, centers or areas at a defined location.
- Rooms – Located inside buildings, centers or areas at a defined location.

12.11 Login ID – Information used to log into the calendar program. A Login ID is often referred to as a user account.

12.12 RSS – Really Simple Syndication – Allows users to subscribe to their favorite content

- Delivers its information as an XML file called an RSS feed
- Simple XML-based system
- Formats are specified in XML (a generic specification for data formats)
- A program known as a feed reader or aggregator can check a list of feeds on behalf of the user.
- A feed reader displays any updated information (or events) that it finds.

12.13 Subcategory – Subcategories are used to further classify events on the calendar.

- When viewing the calendar users can further refine event listings
- Subcategories are not required but are recommended.