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Overview

This article shows how to **activate** a **checkbox** on your <u>donation form</u> and <u>event</u> pages allowing the donor and/or event attendee to **cover** the merchant gateway **transaction fee**. It also shows how to **set the percentage** in your database that they'll be covering (which varies from gateway-to-gateway).

Tip: Click <u>this link</u> to view all the **merchant gateway** options that **Trail Blazer** integrates with.



Steps to Set the Merchant Gateway Transaction Percentage (%) and Activate it for your Donation Form

Open Website Configuration. Requires security clearance.





Under the **Site Settings** tab set the **percentage (%)** you want your donors and/or event attendees to **optionally* **cover**, and then click **[Save]**. *In my example I set the percentage to 3% which covers the 2.75 percent my merchant gateway takes + the .45¢ per transaction.*



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No components are available.		Merchant Fee Option	
		Set a fixed percent to cover your transaction of by the payer this will add X percent to the tot	osts. If selected al transaction.
		I want to add: 3.00 % to cover tran	saction costs. Note: To enabled this feature, donation and events need to have 'Merchant Fee Pay Option' enabled.
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l			
Logon = Joel Kristenson			Save Save and Close OCancel



Navigate to the **Donations** tab, check the box for **'Include Merchant Fee Pay Option'**, click **[Save]** and then click the **blue** hyperlink in the **top-right** for **'Click here to refresh your web pages using updated specifications'**.



1

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Include Restricted Funds (Allocations) Dropdown Style	ck.png" style="fl left:10px; margir	loat:left; height:144px; margin- n-right:10px; width:100px" />
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: 🔽 Include Merchant Fee Pay Option	However, the port	tion of the page above that
Include Comments	connected by secu provider (Trail B	ure server to our database Blazer). : Their
Include Honor of	server IS securin	ng your credit card transaction 🔻
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Include Donation Other Amount	Attribute Folder 4:	<no folder=""></no>
Include Donation Level Description(s)	Contact Box:	
Include Donation Ticker	Amount Box:	First Payment Amount (select frequency be
Ticker Size: 0	Frequency:	
Ticker Start Date:	Button:	Make Payment
Display Position of Donation Amount(s)	Fund Box:	Please designate your funds below
Location: Usplay Donations at Page Top	Honor Box:	Please specify who to write to (Include Na
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Click **[OK]** to proceed with the web page refresh.



You'll be prompted once the refresh is complete. Click **[OK]** to finish.





You'll now be able to **view** the new option on your **donation form**. In this example I viewed the form where it's hosted on **Trail Blazer's** secure domain e.g. <u>https://www.trailblz.info/demononprofit_joel/donations.aspx</u>.



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Trail Blazer	Share: 📑	in 🗄 🔁 Gal{0
Billing Information	on	Donation Amount
* First Name		Supporter
Middle		\$50 - Supporter Plus
* Last Name		\$100 - Friend
Nickname		\$500 - Patron
* Address		\$750 - Bronze
		\$1000 - Silver
* City		S2000 - Gold
* State	Select State	Other
* Zip Code		Ves. I would like to cover the transaction fees so my entire
* Phone		donation goes to <i>Demo Nonprofit - Joel.</i> My total donation(s)
* Email		including lees will be \$10.31.
	Yes, I want to receive future email updates.	
Show my donat	tion on the website ticker.	Single One Time Donation
Comment	The new option	Select a Restricted Allocation Fund Below
	for donors to cover	.00 2017 Building Renovation



If the donor opts to cover merchant gateway fee they'll receive an email receipt showing the full amount that was charged. My example is below.



From:	Demo Nonp	rofit Joel <jkristenson@trailblz.com></jkristenson@trailblz.com>	Sent:	Mon 6/19/2017 3:56 PM
To:	Joel Kristen	son		
CC:	Depation	Accepted Cingle (10.21 by John Hanny		
Subject	Donation	Accepted - Single - \$10.51 by John Henry		
Name o	n Card			
Donor N	lame	John Henry		
Street		8164 Metal Head Rd.		
City		Greenbay		
State		WI		
ZipCode	e	54229		
Nation		US		
Phone		6548789741253		
Email		john-hammer123@me.com		
Amount	:	\$10.31		
Honor o	r			
Memory	of:			
		The donor will receive a receipt with the tota	I	
		donation amount (including the merchant ga	tev	vay fee
		they covered)		
-		tiley covereu).		
 See m 	ore about:	Demo Nonprofit Joel.		222 ^



In the database you can **build reports** that include this data in the **Contributions** list.

Navigate to **Contributions** under the **Application Menu**.







Click the [Format] drop-down and select Columns...



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		46972		Noam	190.72	5.72					DI-1442
E			Assign as default								Plot 142



Check the box for 'AmountDonorOptedGatewayFee' and click [OK].



S Column	Selection		_ 0 <mark>_ X</mark>
Columns Table Joined Tab	Format Contribution AccountFecTypeld AllocationCount AllocationFund AllocationFund Amount/TaxDeductible AmountAfterRefunds AmountAfterRefunds AmountAfterRefunds AmountAppliedAgainstPledge Address [DefaultDisplay] Address [Home] Address [Mailing] Address [Mailing] Address [Work]	es Fee	
Progress—		2	Cancel



The **new column** will display in the grid (by default it will be added to the far right).

If the merchant gateway fee was covered for the online transaction it will display in the cell. *You can drag the columns left-or-right to rearrange them – my example is below.*

	Searc	h ≽ Reset 🚽	• New	3	🕈 🦂 📔 Fi	ile 🕶 Edit 🚽	Apply to Pl	edges Co	ntributions											
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You can save this format for future use.



Steps to Add the Option for Event Attendees to Cover the Transaction Fee on an Event

Open the Events list.





Search for the event and open it.



1. Run a search query for the event you want to add the option for.

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		Last	10 Days 30 Days	End Date:	< custom, acco	ording to dates	below> 💌								
		Last	60 Days	Event tracks con	tributions		9								
		Lust	ou bays	Event is published	ed to web										
l ⊞ s	ort	H Form	at 👻 🧱 Wrap 🛛 📲 🛣 Export	📚 Print 🌐 Pivo	t										
Event	ts [4	records f	ound]												
	V	Event ID	Event Name		Start Date	End Date	City	State	Public	Track Contrib- utions	Fundraising Goal	Open Pledges	Contributions	Summary Count	Close Registration Time
	V	58	Become a Member		1/1/2016	12/31/2075	Golden Valley	MN	V	V	.00	.00	417,936.89	982	3/7/2016
	V	63	Blazing Trails - The King's Tr	ail - (5/15/2030)	5/15/2030	5/25/2030	Abisko		V		.00	.00	5,455.00	6	5/8/2030
	V	28	Blazing Trails - The King's Tr	rail - 2020	5/15/2020	5/25/2020	Abisko				.00	.00	13,117.00	7	5/8/2020
		48	Online Store - Trail Blazer A	pparel	1/1/2014	12/31/2020	Golden Valley	MN			.00	.00	.00	0	6/1/2014
Σ	4								4	4	.00	.00	436,508.89	995	
-	-							-							

2. Open the event record.



Navigate to the **Financial** tab, check the box for **'Merchant Fee Pay. The payer can optionally add X percent to the total transaction to cover the processing fees.',** and then click **[Save]**.



File - Edit - 🗙 🛛	🖉 🔷 View Directory 🍖 View Page	💞 [Beta] Theme Builder 🕴	Blazing Trails - The King's Trail - 2020 [28]	
Event		Published Event Description	1	
Event Name:	Blazing Trails - The King's Trail - 2020	🍐 🖒 🔓 🧮 🖸 🕻	2 🔑 😓	
Calendar Category:	Fundraiser 👻	 <p style="color: re</td><td>d; font-size: 20px;"> (Tickets are limited to 10</p>	A	
Enable assignmer	nt of contributions and expenses	people) br <h5>Abisko Mountain St</h5>	/> tation to the Saami Village of Nikkaluokta.	
V Public Event (Pub	lish to web site)	 br/>	Gene fant familie anneier nam fant meiste	
Start Time:	5/15/2020 07:30 AM	bold;">The Map is where	the main building is but we'll be meeting in a	
End Time:	5/25/2020 04:00 PM	be a million sines as well	x & long: xxxxxx [Call us if you get lost, there will to help] 	
		Insert an image from	a web site:	
Close Registration	n 7 Days Before Event	- Sleeping Bag 		-
Close Time:	5/ 8/2020 07:30 AI 👻	Publish Location:		•
Sales Summary G	allery Setup User		1	
		li in le i		
Address Contact	Products Promos Web Customizati	on Logo/Banner Email	Response Financiai Legacy Settings	1
Setup Recurren	nce	0		
Remove This Eve	ent From Donation Query Results (Deduct fro	m Donations)	Merchant Fee Option	add X percent to the total
Receipts from	n this event are ELIGIBLE for exclusion fro	m donation query results.	transaction to cover the processing fees.	add × percent to the total
Financial				
Note: Fundraisir	ng Goal is used for			
event "Money E	Bomb Tickers"		2	
Fundraising Goa	al:	.00		
 Allowed payment 	type for event			
Warning: Take o	caution when configuring this feature. Mixin	g donations WITH		
tickets/products monthly, annual	when recurring payments are enabled for ly etc. will result in unwanted LARGE credi	example: weekly, t card payments. The		
intention of this	option is to allow an entire order of tickets/	products to be divided		
memberships, p	aid over a period of time.	Isuauon or		
All purchasabl	ie items and donations will be eligible for insta	liment payments.		
(System Default)	ult) No installment payments are allowed on th	nis event.		



If the event is **published** you can click the **[View Page]** at the top to preview the new option.

If the event is published you can view it by clicking the [View Page] button.

File - Edit - 🔽 🙉 🏟 View Directory 🚳 View Page	[M] [Beta] Theme Builder Blazing Trails - The King's Trail - 2020 [28]				
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Note: Fundraising Goal is used for event "Money Bomb Tickers" Eundraising Goal:	00				



Select a ticket or product and proceed to the checkout page.



26

Blazing Trails - The King's Trail - 2020 Friday May 15, 2020 7:30 AM to Monday May Abisko Mountain Station Meet at the Trail Head Abisko, 98107 Ticket Information DESCRIPTION Single - 7 Day Guided Hike Roll of 4 Tickets Product Information DESCRIPTION Trail Blazer Hooded Sweatshirt Payment Options FOO. COMPANY FOO. COMPANY FOO. COMPANY Company Product Information	25, 2020 PRICE QUANTITY \$2,500.00 1 \$400.00 0 \$400.00 0 PRICE QUANTITY \$65.00 0	When and Where
Friday May 15, 2020 7:30 AM to Monday May 4:00 PM Abisko Mountain Station Meet at the Trail Head Abisko, 98107 Ticket Information DESCRIPTION Single - 7 Day Guided Hike Roll of 4 Tickets 1 Product Information DESCRIPTION Trail Blazer Hooded Sweatshirt Payment Options IVISA PLO. Eccelor	PRICE QUANTITY \$2,500.00 1 \$400.00 0 PRICE QUANTITY \$65.00 0	Y When and Where
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Payment Options VISA DISCOVER P.O. echeck	0	
	_	Abisko Mountain Station
	2	Meet at the Trail Head
Orde	r and Register	AUSKO, SOLOT
		Fri, 15 May 2020 7:30 AM to
		Central Standard Time
Description		
		Add to my Calendar
(Tickets are limited to 10 people)		



The new option will display.



	Share: 📑 in 🕒 🕂 💽	
		S Trail Blazer™ Organize.Leverage.Succeed.
	Friday May 15, 2020 7:30 AM to Monday May 25, 2020 4:00 PM Abisko Mountain Station Meet at the Trail Head Abisko, 98107	
	Order Summary	When and Where
_	DESCRIPTION PRICE QTY TOTAL	
_	SINGLE - 7 DAY GUIDED HIKE \$2,500.00 1 \$2,500.00	
_	Promotional Code Apply	
	Yes, I would like to cover the transaction fees so my entire payment goes to <i>Demo Nonprofit</i> - <i>Joel</i> .	
	TOTAL DUE \$2577.32	
new option	Have you registered for a Demo Nangrafit - Jae/ event before? click here to login.	
nspiay ne checkout	Registration Information	
	Buyer Information	
	* First Name	
	* Last Name	Abisko Mountain Station Meet at the Trail Head
	Phone	Abisko, 98107
	* Email	Fri, 15 May 2020 7:30 AM to
	Yes, I want to receive future email updates.	Mon, 25 May 2020 4:00 PM Central Standard Time
	* Employer	Add to my Calendar
	* Occupation	
	* lob Titlo	Organizer



Take a look at the **related resources** below for a wide range of similar articles and videos.



YouTube Channel

- Knowledge Base Articles

- 3rd Party Resources



Related Resources

Article: How to Enable ACH (E-Check) Payments with the Vanco Merchant Gateway on Trail Blazer's Donation Form Article: Linking your Website to your Database with Configurable iFrame Forms Article: Configure Website (iFrames) Article: How to Put your Trail Blazer Donation Form on your Facebook Page Article: How to Configure Recurring Donation Options for your Trail Blazer Donation Form (must be using either Vanco Services or Authorize.Net as your Merchant Gateway) Article: Web site signup < iframe > Article: Configure Website – Legacy Article Article: Custom Donation Amount for Non-Primary Donation Pages – List of All Configurable Donation Page URL Options Article: How to Create a Custom Redirect Thank-You Page for your Donation Form(s) that Automatically Populates the Donor's First Name and the Donation Amount that they Gave – Advanced Feature Article: How to Setup and Activate your Authorize. Net Account with your Trail Blazer Database for Online Payments and for Recurring Transactions Article: How to Activate your Anedot Merchant Gateway with Trail Blazer – Configuring API Credentials Correctly Article: Modify your Donation Form – Change the Amounts – Add Descriptions – Add & Remove which Amounts Display Video: Iframes Video: Attributes – Add To Donation Page Video: Donation Auto Responders with Merge Fields Website: List of All Merchant Gateway Options that Integrate with Trail Blazer

Video Playlist: Events



Trail Blazer Live Support

- **C** Phone: 1-866-909-8700
- Email: support@trailblz.com
- Facebook: https://www.facebook.com/pages/Trail-Blazer-Software/64872951180
- Twitter: <u>https://twitter.com/trailblazersoft</u>

* As a policy we require that you have taken our intro training class before calling or emailing our live support team.

<u>*Click here*</u> to view our calendar for upcoming classes and events. Feel free to sign up other members on your team for the same training.

* After registering you'll receive a confirmation email with the instructions for how to log into the <u>GoToMeeting</u> session where we host our live interactive trainings.

* This service *is* included in your contract.