International User Guide for

International Aura V2 User Guide

Last Updated: November 19th, 2015

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2 Document Version

Document	Change	Date of Change:
Aura V2 UK Guide	• Added new features released for Version 2 including expanded character limits, four new "Other" payment options, and corrected default by URL variables.	Nov 17th, 2015
AURA UK Guide	• Added URL Pre-populate/default table values.	June 23rd, 2015
AURA UK Guide	• Added details on Aura Shopping Cart. • Added details on new Clone/Copy feature and updated screenshots.	May 21st, 2015
AURA UK Guide	• New fields added to control organization's contact details on Direct Debit forms.	Sept 11th, 2014
AURA UK Guide	• Updated Portal screenshots	June 18th, 2014

3 iATS Payments Contact Information

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For the most up to date versions of our documentation, this Aura guide, the Brickwork User Guide, and the Brickwork Installation & Configuration Guide can be downloaded by visiting our website http://home.uk.iatspayments.com/product-guides

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4 Overview

Aura

Aura is an iATS Payments product that allows you to embed a payment form into your existing webpage. This payment form allows end users to send an online payment directly to secure iATS web servers, ensuring that you are not passing or storing sensitive payment information.
Each Aura form is related to a specific form or donation page you configure individually. Your agency can have one or many of these forms, based on your needs. Aura is a powerful tool that can be handled by a person with limited or no programming knowledge.

The appearance of Aura is customizable by using custom a Custom Style Sheet (CSS) from your existing website.

AuraLink Webservice

AuraLink is an iATS Payments product that allows complete customization of the Aura payment form. As the AuraLink payment form is built by you, there are no restrictions to the design or functionality that can be added.

For more information on our AuraLink Webservice, please contact iATS Customer Care or download the documentation here.

PCI Compliance

As a Level 1 Payment Card Industry (PCI) certified company; iATS Payments ensures all transactions are handled with the highest industry standards in security and confidentiality.

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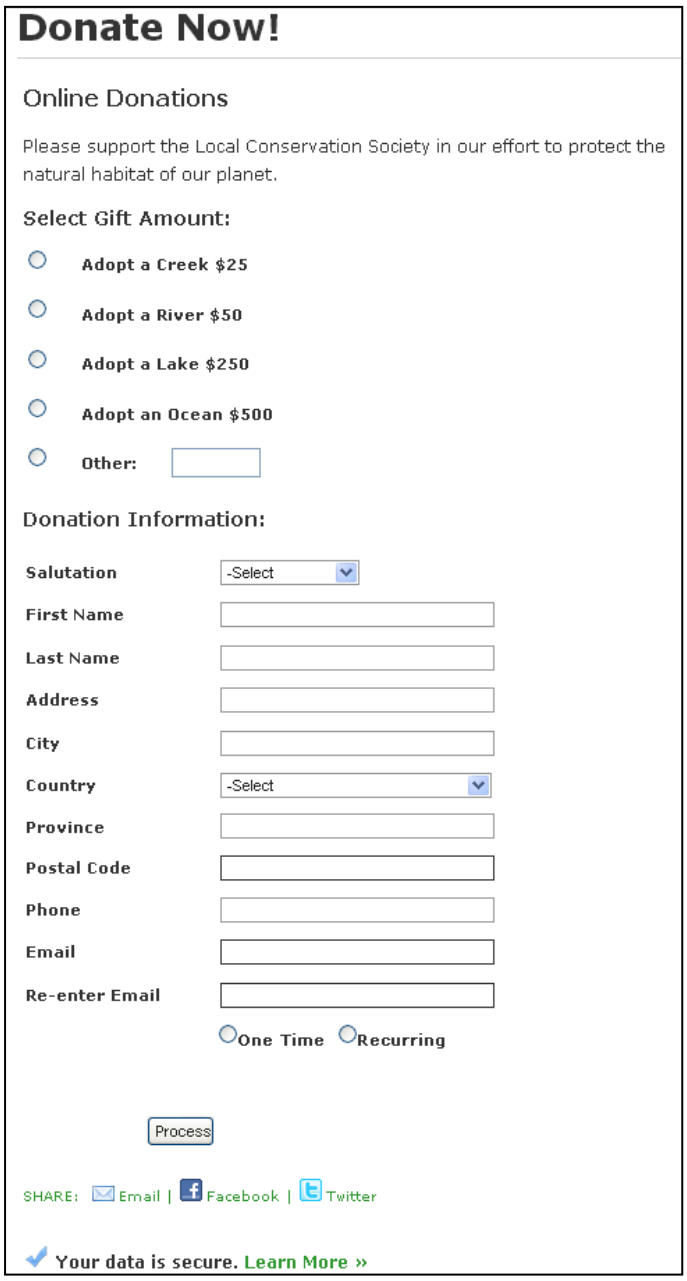
5 How to Create an Aura Form

The following steps detail how to create a basic Aura form, utilizing Aura as it has been designed out of the box. This tool is ideal for users with little or no programming and web development training.

For a more detailed review of each tab and section, including character limitations, please refer to the "Detailed Review of each Aura Tab and Field" and the "Aura Customization" sections of this guide.

- The Aura Set-up is comprised 5 tabs:
  - Form Info
  - Payment
  - Amount
  - Responses
  - Share

Each tab contains the fields associated with that particular portion of the Aura form.



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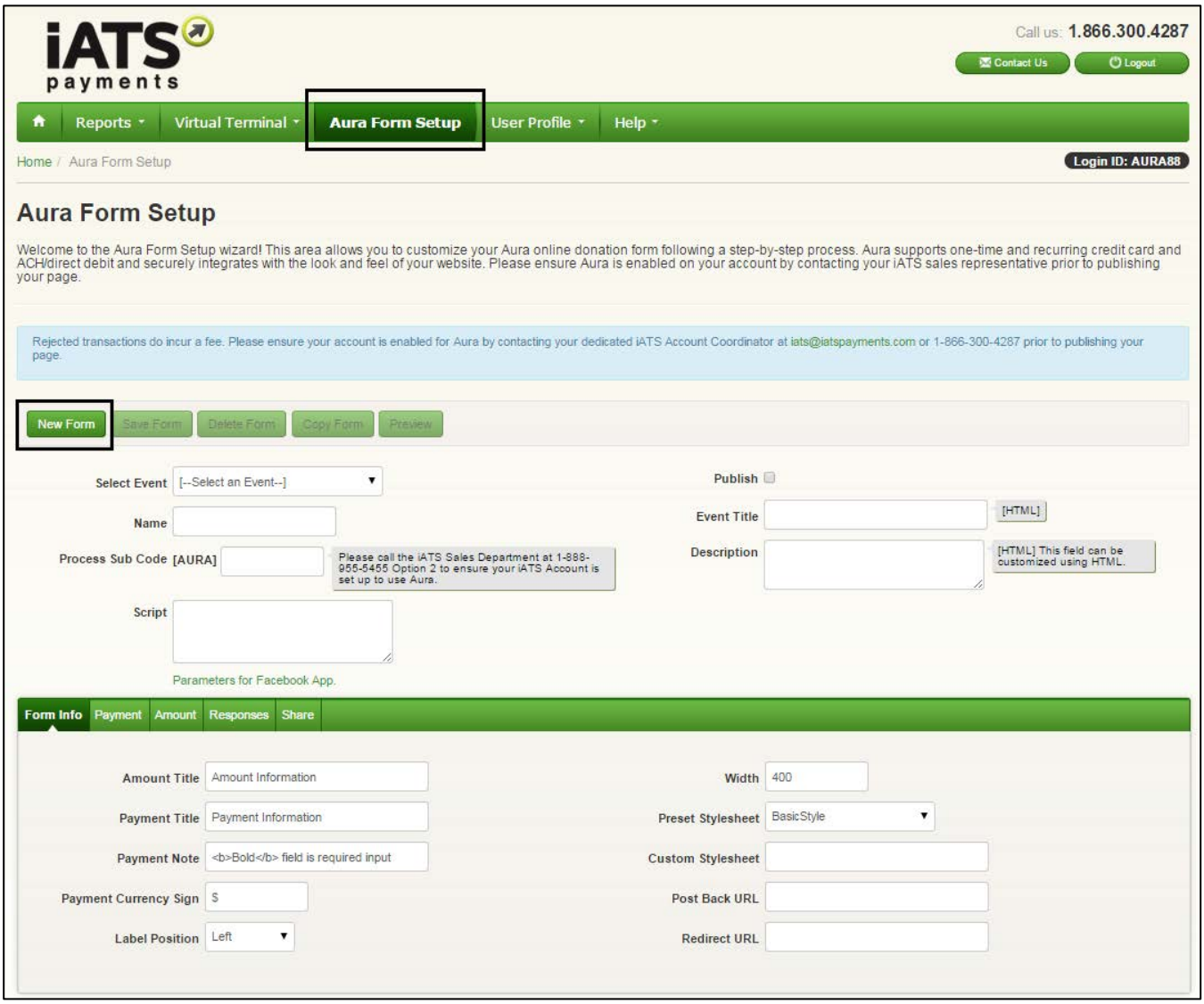
1. To create an Aura Form log into our website www.uk.iatspayments.com and click on the "Aura Form Setup" tab.
2. To create a new donation form first **click the New Form button**, or select an existing form from the "Select Event" pick list and **click the Copy Form button.** This option will clone the existing form, and add [Copy] to the Name field.



3. Name the Aura form. This name will only be displayed internally, and not displayed on the final Aura page.
4. If you have created a copied Aura Form via the Copy Form button, double check the Process Sub Code field and modify the iATS Merchant account sub-code if needed.
5. Enter a Title and add information to the Description field. Refer to the image below to view how these fields will display on the Aura form.

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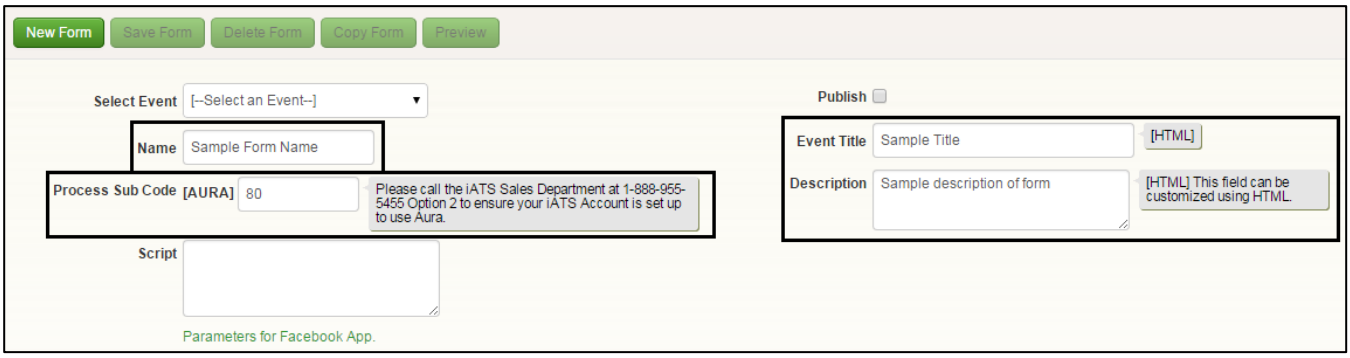
Note: Fields marked with [HTML] indicate that HTML coding can be used in these fields. Please use single quotes in place of double quotes.



6. In the Process Sub Code box, enter the online sub code digits which were provided by iATS Customer Care. This online code should end in the numbers 80 through 89.
7. While still on the Form Info tab, edit the section titles and width of the form if desired.
8. To mimic the look and feel of the existing webpage which will host the Aura donation form, add a Custom Style Sheet (CSS) into the Custom Style Sheet field. This step is optional, however if not used the content of the form will be displayed with a white background. If desired, a generic iATS created style sheet can be selected from the "Select Style Sheet" drop down box. Note: "Basic Style" is the standard plain style sheet. If desired, a generic style sheet can be selected, and used in conjunction with your own Custom Style Sheet. The CSS will override the "Select Style Sheet" option.
9. To allow information to post to our Salesforce Application Brickwork or alternate CRM third party software, add a Post Back URL. For more information on how Aura connects with Brickwork, please contact iATS Customer Care.
10. To direct the user to an alternate website once the transaction has been completed, add a Redirect URL. This will fire after 3 seconds once a transaction is approved. If a transaction is rejected, the donor will not be re-directed.

11. Click on the Payment tab.
12. The Payment Tab comprises five sections which can be customized if desired (Donor Details, Custom Questions, Payment Details, Payment Frequency, and Other Options).

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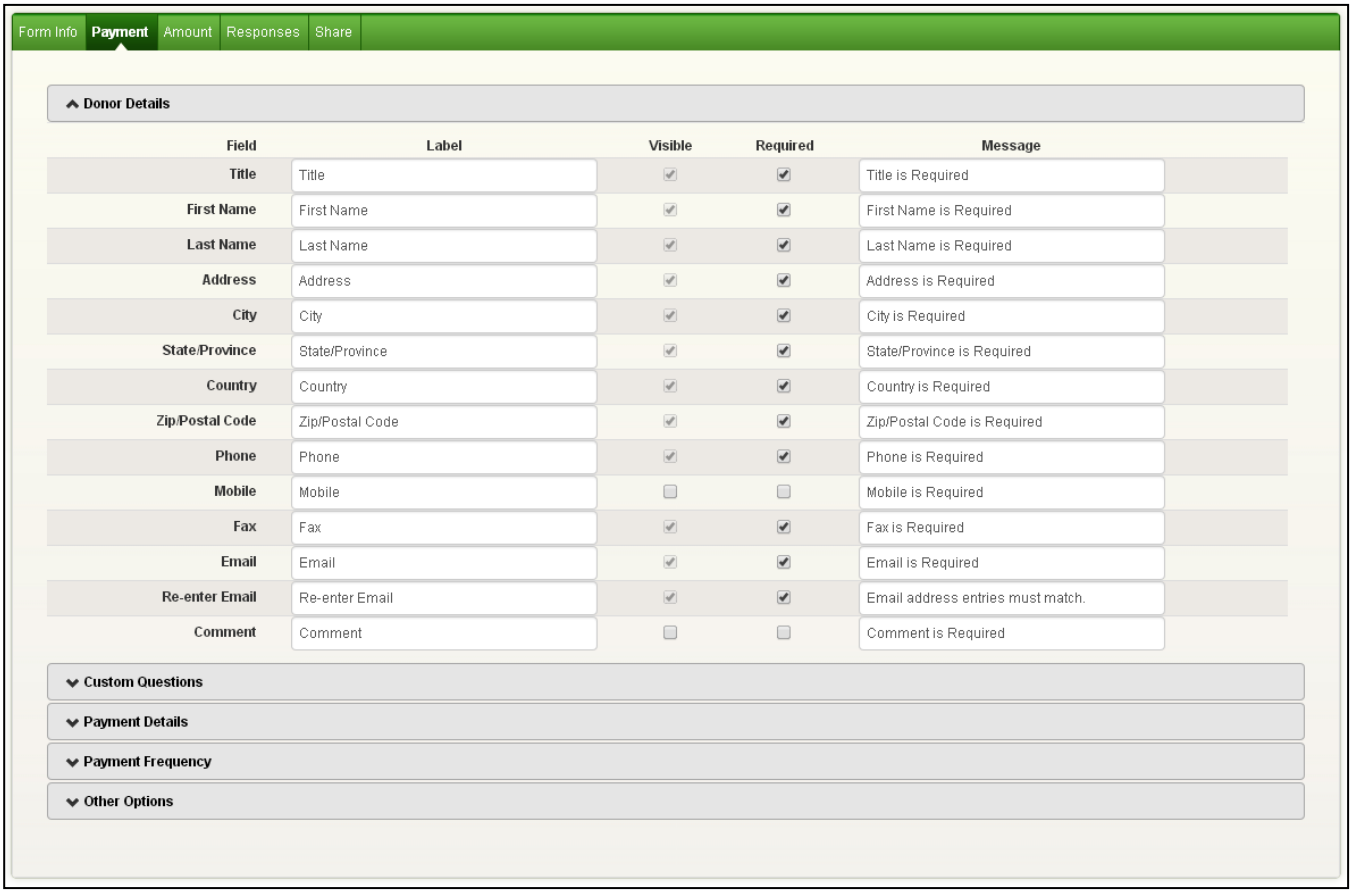
13. Within the Donor Details section, add or remove a checkmark in the “Visible” and “Required” checkboxes to customize the visibility and requirement of each field.
14. If desired, the Label and Message field text can be modified to allow for additional customization.



15. The Custom Questions section allows you to gather data from your donor. A text box will appear to the donor by default, however if radial buttons are needed for the response, add a checkmark to the Enable Select option, and type the applicable answer options separated with an enter key.
16. If additional space is needed to describe the question, click the More Info button on the right side of the item. Text entered here will appear as a question mark beside the question on the donation form.

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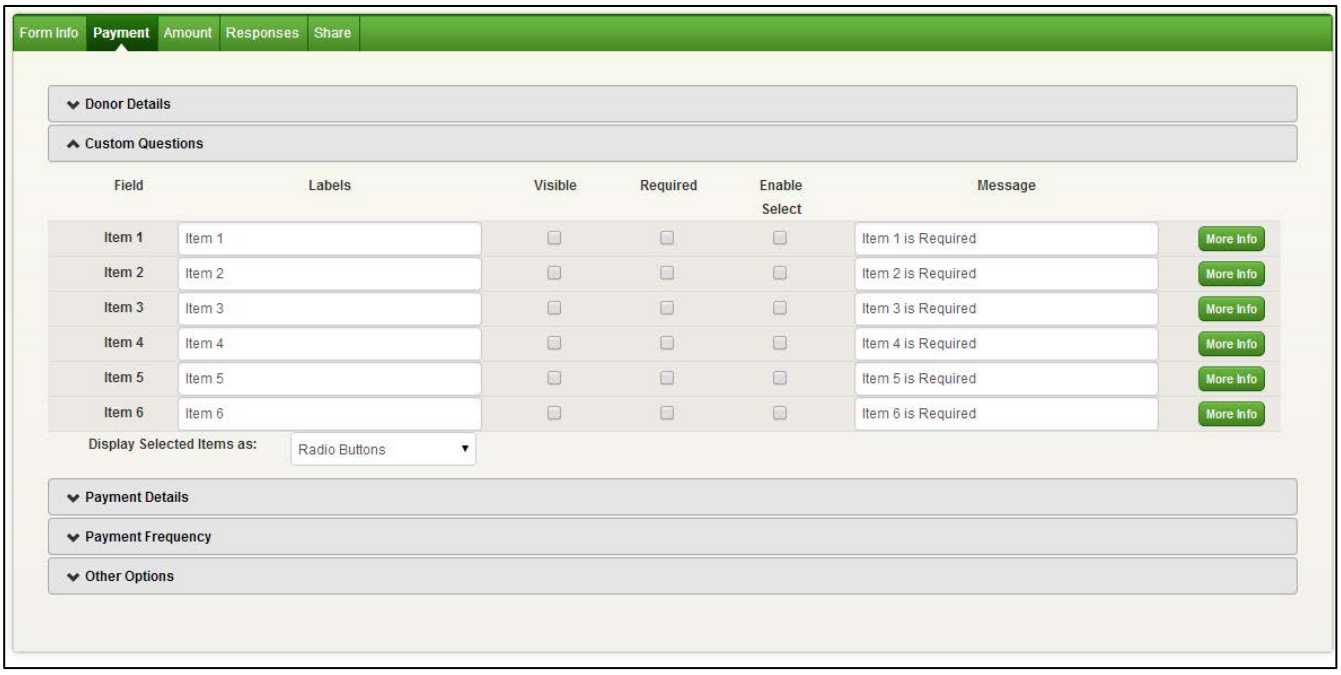
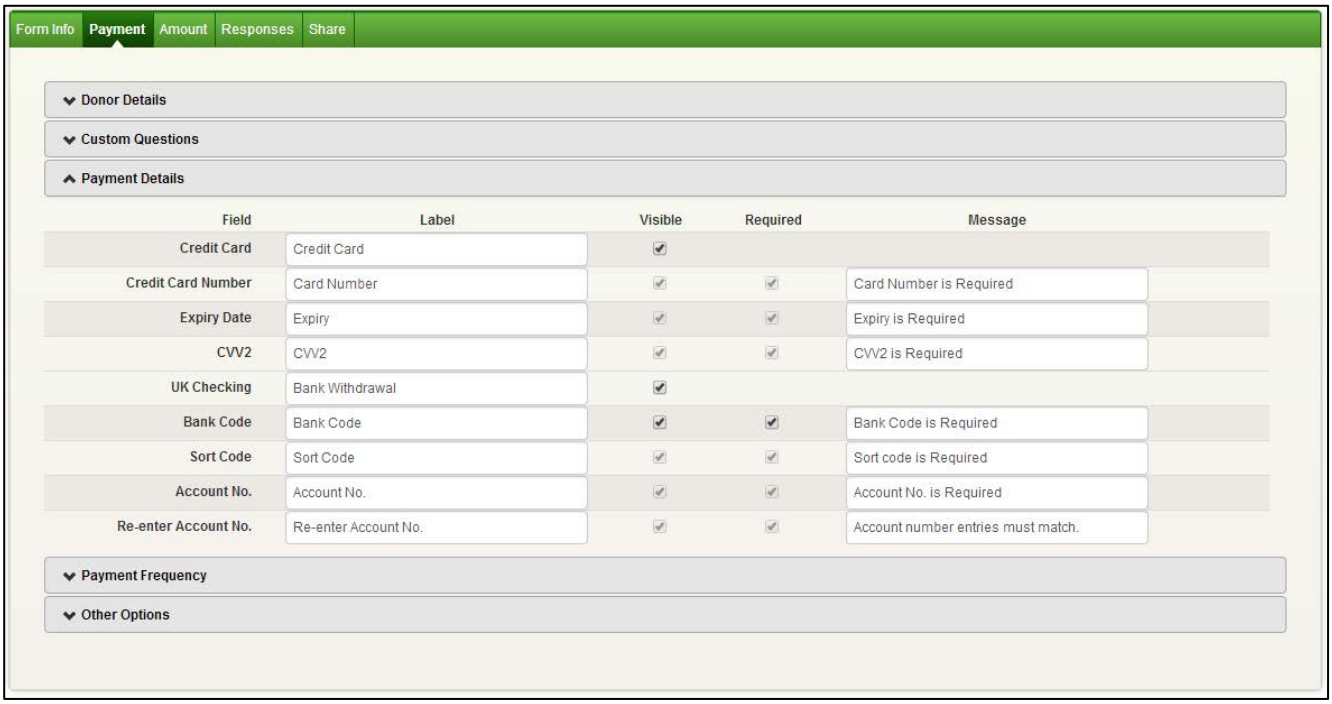


17. Expand the Payment Details section to choose the methods of payment and payment schedule options for your form including Credit Card, UK Direct Debit, and Euro SEPA services.

    Note: if using our UK Direct Debit option, please add your Organizations contact email address, phone number, and SUN details to the Account Setup page within the User Profile tab (open in a new window so you don't lose your progress on the Aura form.)



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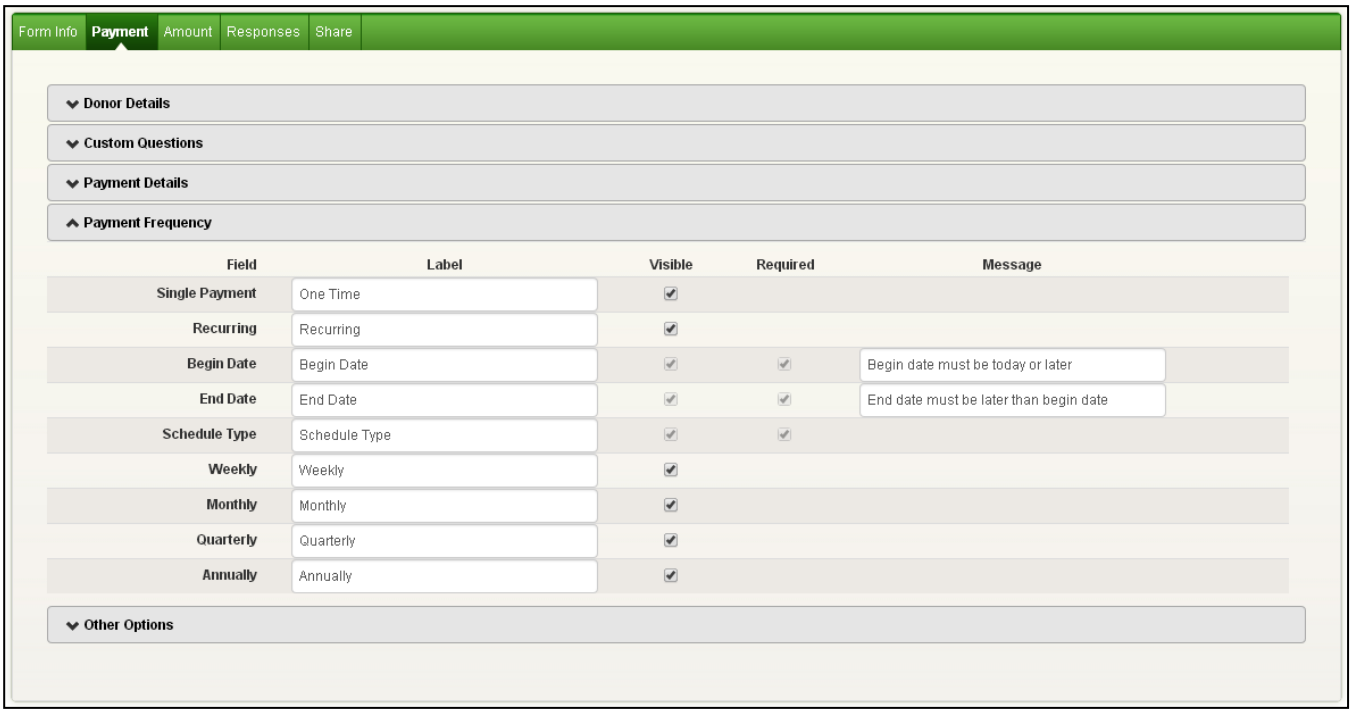
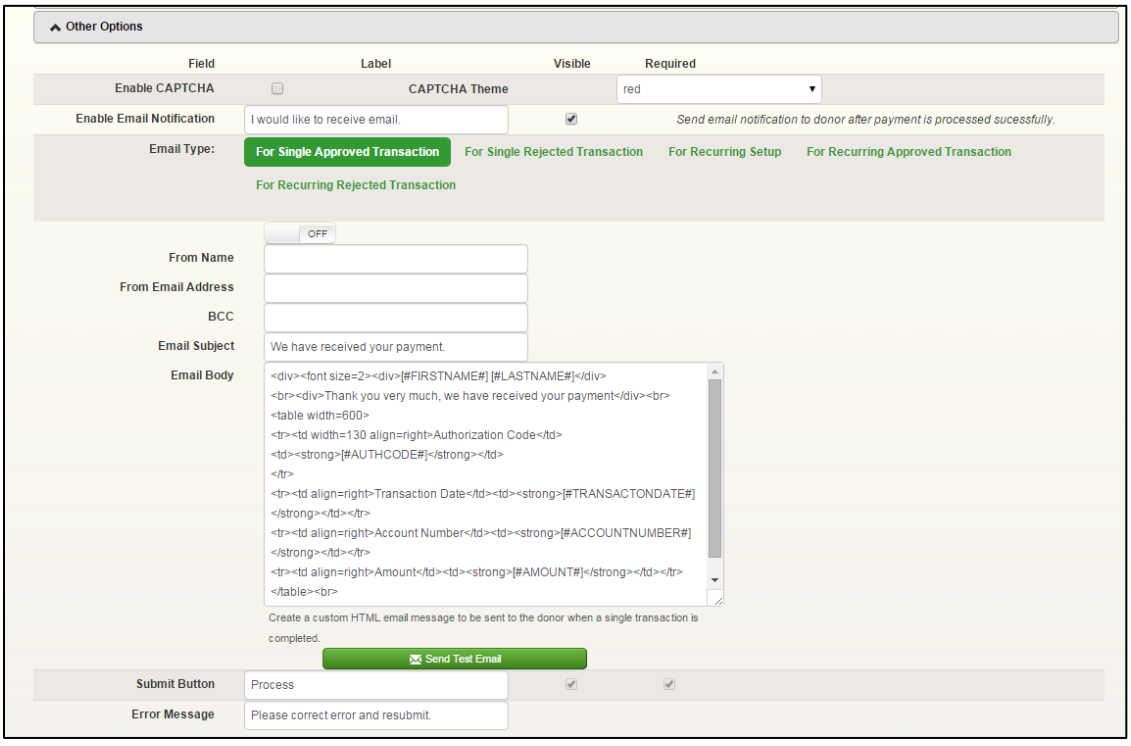
18. Expand the Payment Frequency section to add or remove the Single Payment and Recurring Payment options. If Recurring is enabled, different Schedule Types can be enabled or disabled as needed.



19. Expand the Other Options section to enable the email notification tool, and Captcha. For more information on customizing the email notifications, please refer to the Aura Customization section.



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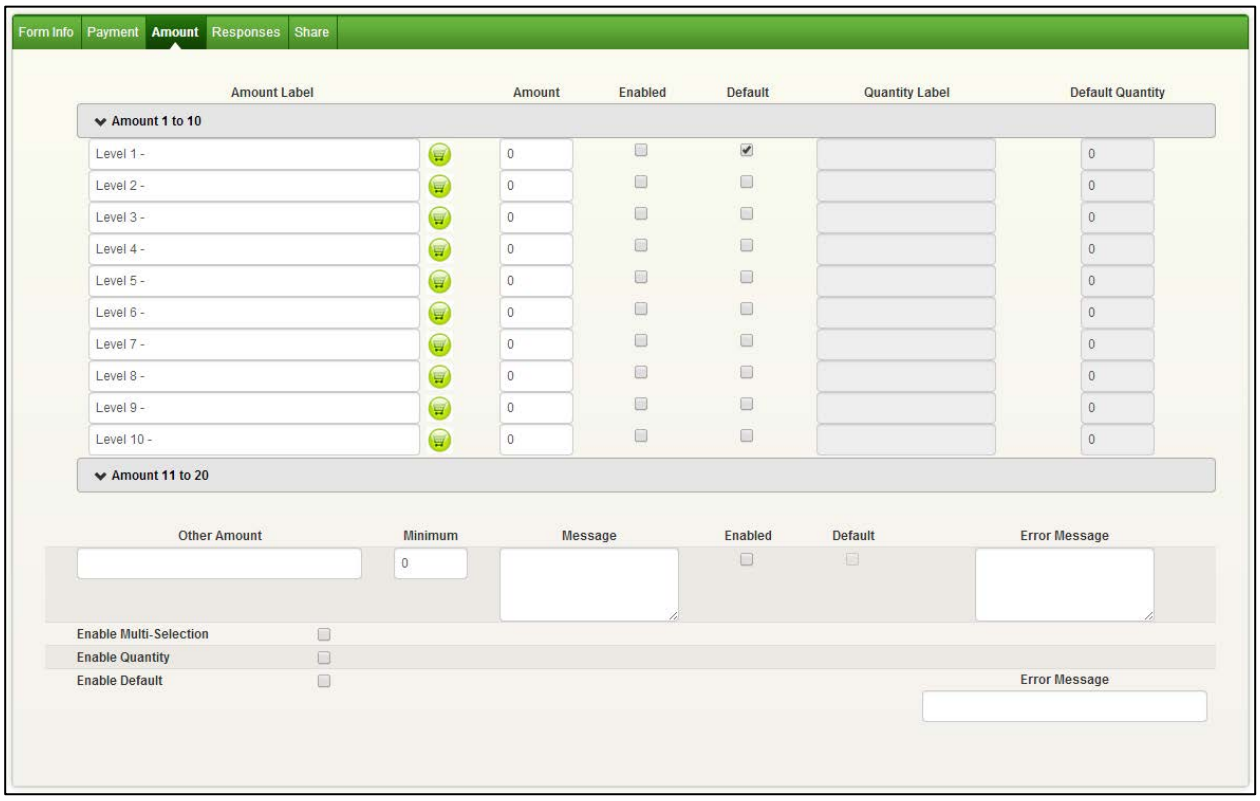
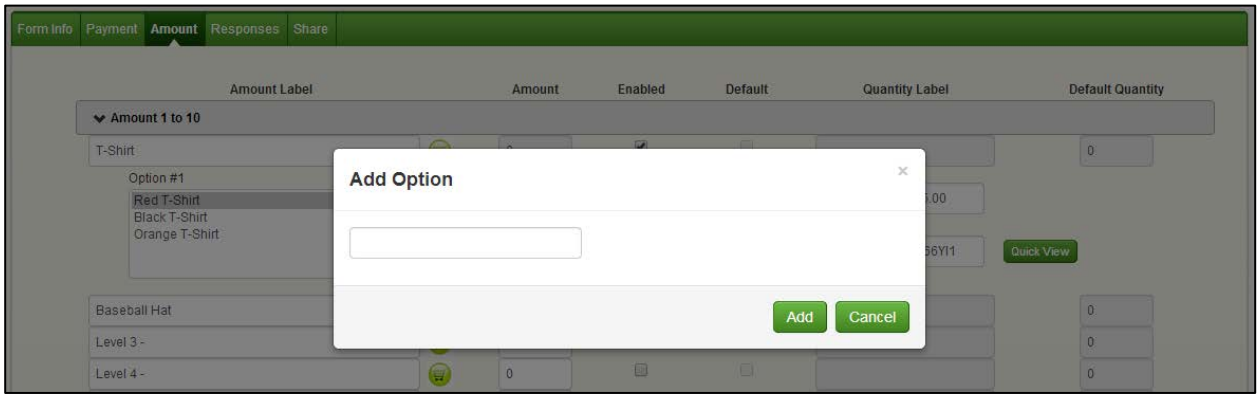
20. Click on the Amount tab.
21. The Amount tab enables customization of the descriptions that appear beside the dollar amounts visible to the end user. To ensure visibility, checkmark the Enabled checkbox. To enable the user to enter a unique dollar amount, the Other Amount option can be enabled.



To enable our new Shopping Cart feature (new for Spring 2014), click the shopping cart icon beside one of the 20 payment levels. The Enable Multi-Selection and Enable Quantity options will automatically be selected. Within the Shopping Cart pop up options, you can add up to 20 Option 1 selections (such as Size), and up to 20 Option 2 selections (such as Color).

Please note: *Each option has a 200 character limit, however longer labels may require you to expand the Width of the form (field located on Form Info tab), and apply custom CSS styling to adjust the height of each option.*



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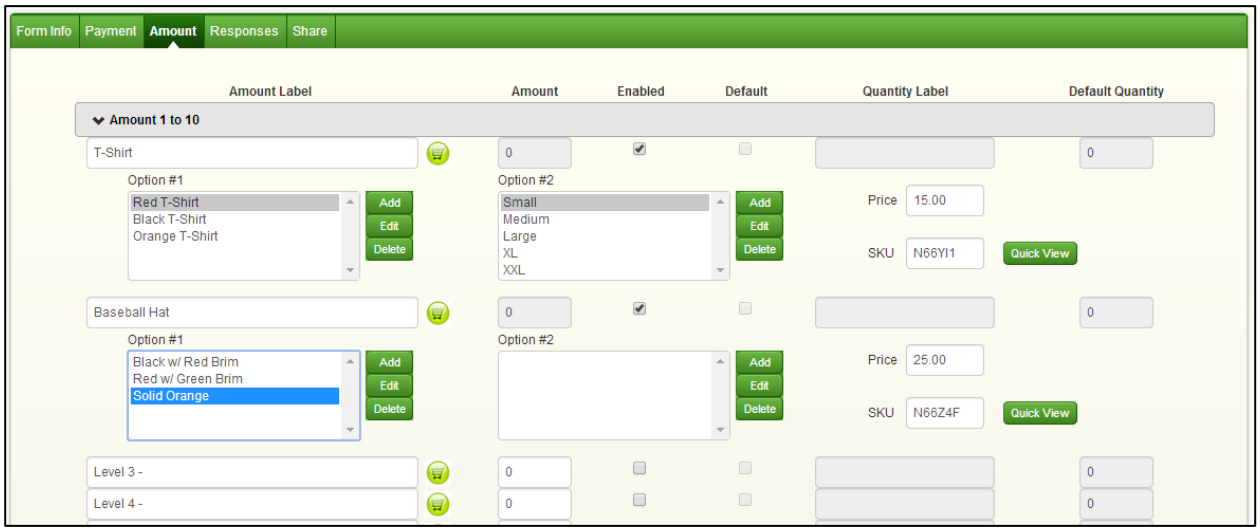
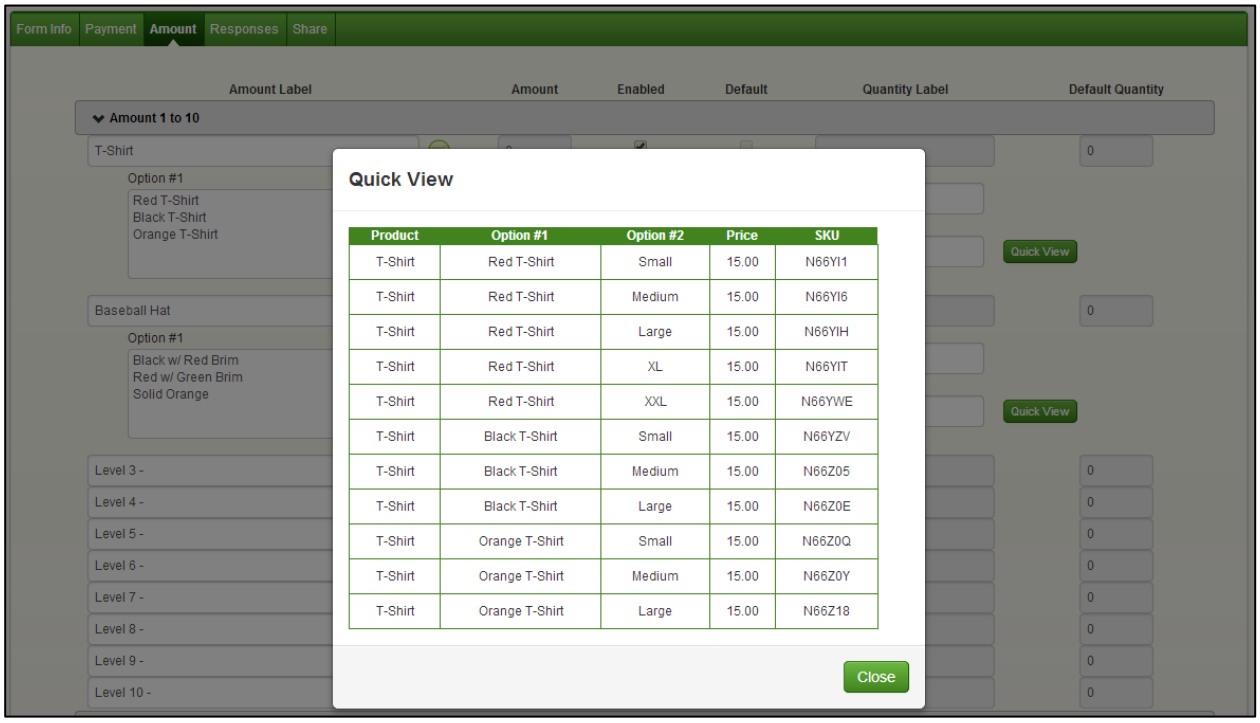
22. Once each option is added, you can add a price. A new unique SKU will automatically be created, however you can change the SKU if needed.



23. Once finished, you can click the Quick View button to display a grid of all options and SKU's.



For more detailed information on setting up a shopping cart, please refer to the "Building a Shopping Cart" section of this user guide.

24. Click on the Responses tab.
25. The Responses Tab comprises three sections which can be customized if desired (Approval Response Message, Decline Response Message, and Recurring Response Message). The Response tab allows

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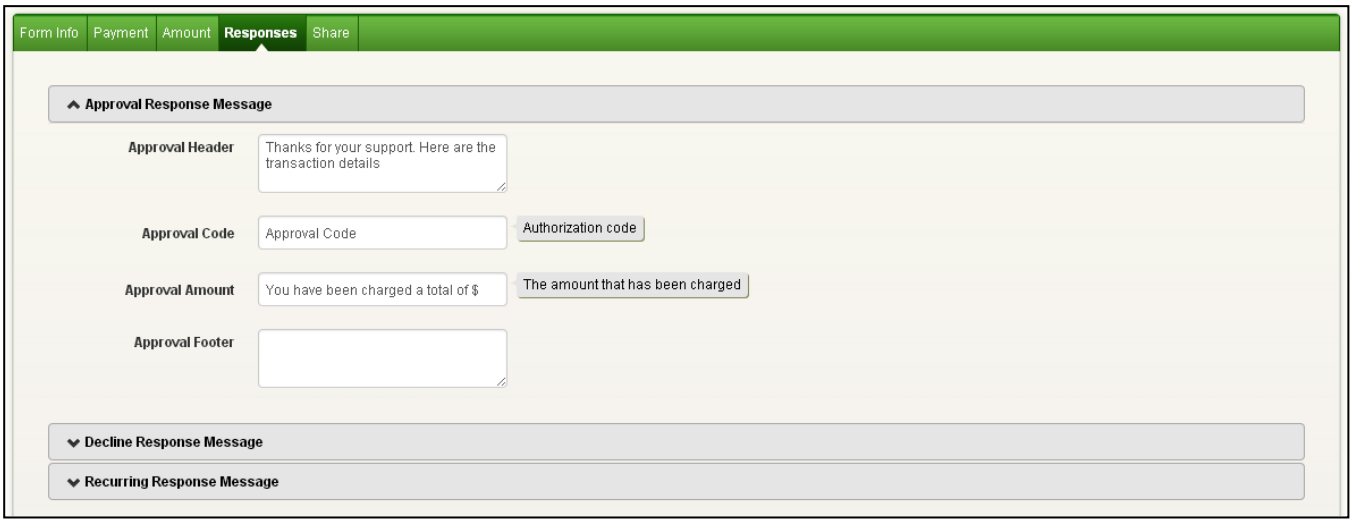
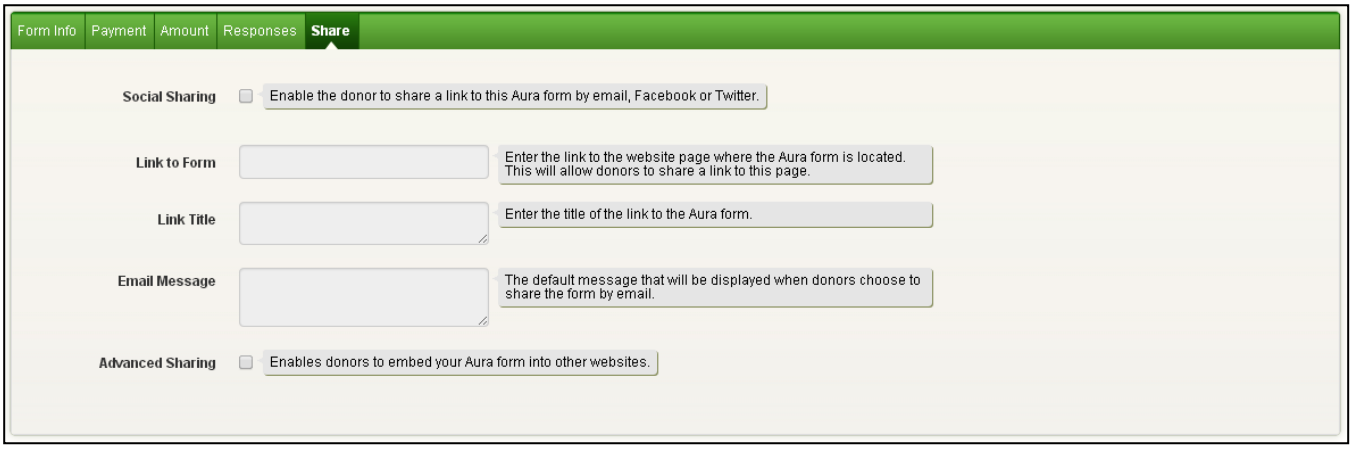
customization of the response messages that are visible to the end user after a transaction has been attempted.



26. Click on the Share tab.
27. The Share tab enables the Aura form to be shared or embedded in a variety of Social Media tools, and secondary websites.



28. Once all five tabs have been customized as needed, scroll to the top of the Aura Form Setup page, and click the Save Form button to generate the Script. Once saved, click the Preview button to view the Aura form.

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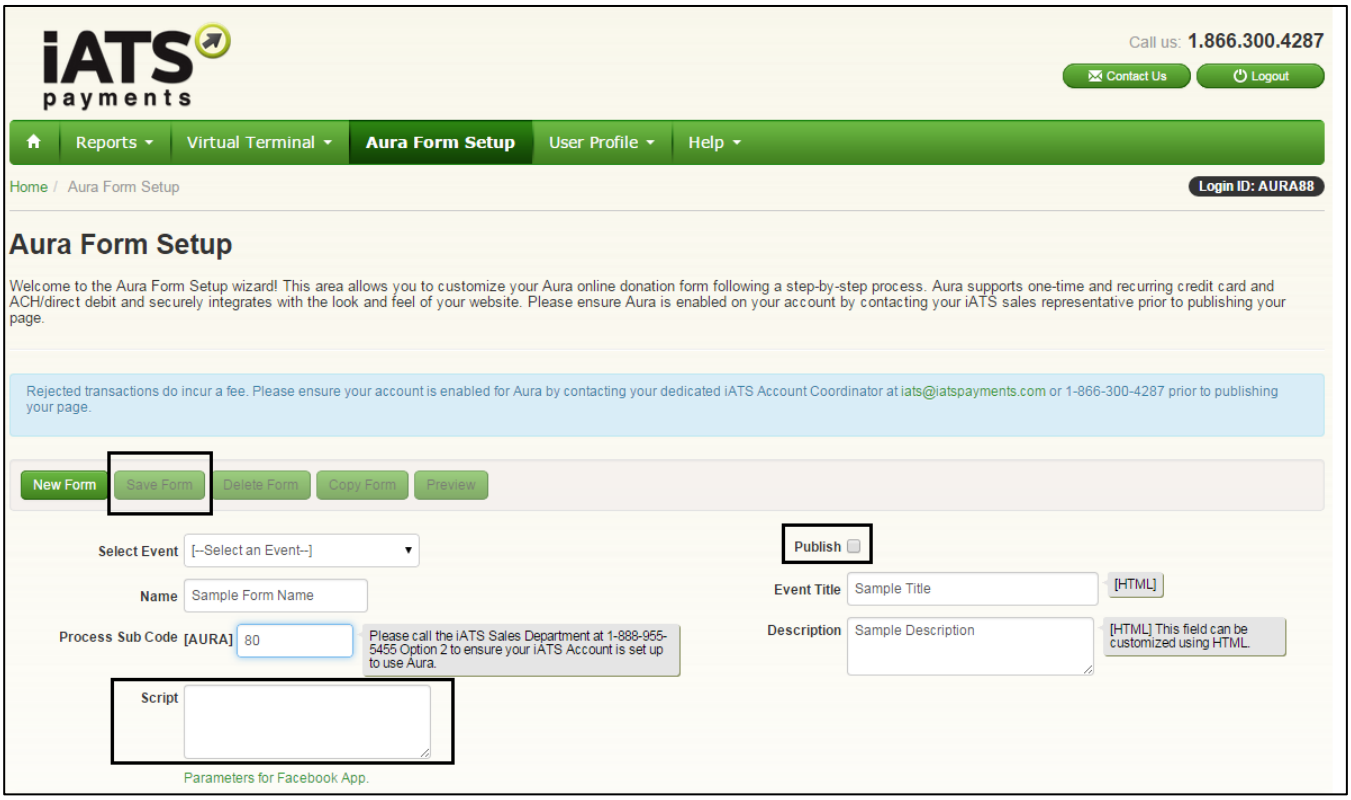

29. Once satisfied with the Aura form, check the Publish checkmark box to activate the functionality of the form. This will enable the form to be used by the end user once embedded.
30. In order to embed the Aura form into your organization's website, copy and paste the Script that was generated when the form was saved. This piece of coding should be embedded between any block-level HTML elements within the source code of your page. Ex: Paste between <body>…</body>, <td>…</td> etc.

    Note: The CAPTCHA security option may not work properly if the AURA script is embedded between ... block.

*** Multiple Aura forms cannot be embedded on the same webpage, even on different "tabs".**

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6 Detailed Review of each Aura Tab and Field

6.1 Main Set-up Menu

The top portion of Setup contains the buttons to create a new form (**New Form**), save (**Save Form**), delete (**Delete Form**), clone a form from an existing one (**Copy Form**), preview your saved form (**Preview**), and modify certain general Aura settings. Please see below for a detailed description regarding each field, including character limits.

Field Name	Description of Field
Select Form	A drop down menu of all Aura forms that have been created. Up to ninety-nine Aura forms can be saved at one time.
Name	The name of the individual Aura form. There is a 59 character limit.
Process Sub Code	The two digit iATS sub-code following the four characters of the iATS Client Code. Ex: AURA**80**. This is the iATS Client code that Aura will use to process all transactions via this Aura form. *Important: Please contact* iATS *Customer Care at 1-888-955-5455, Option 1 or iatscs@iatspayments.com in order to add Aura transaction processing permission if not already enabled.*
Script	This field contains the JavaScript code that needs to be pasted into the webpage where the Aura form will be embedded. This piece of coding should be embedded between any block-level HTML elements within the source code of your page. Ex: Paste between <body>…</body>, <td>…</td>, … , etc. This value does not appear until you have first saved your Form. *Note: Additional Aura customizations are possible by editing the script. For more information, please see the Aura Customization section of this User Guide.*
Parameters for Facebook App link	This link displays options to integration the Aura form into a Canvas App on Facebook using Aura Connect. For more information and our instructions, please click here.
Publish	The checkmark box that enables the end user to view the embedded form and process a transaction. Should be checked when the form is embedded within your website. Note that when the Publish box is left unchecked, the Aura form is only visible to those logged onto the iATS website with the same browser.
Event Title	The title of the form that is visible to end users. This field can be customized using HTML. There is a 100 character limit.
Description	The detailed description of the Aura form. There is a 1000 character limit. Images can be added using HTML. For more information see the Aura Customization section of this guide, Section 9.

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6.2 Form Info Tab

The Form Info tab enables a user to modify the Aura form look and feel in general. Please see below for a detailed description regarding each field, including character limits.

Fields marked with [HTML] indicate that HTML can be used to customize these fields to include, for example, bullet lists, images, and paragraph formatting. Please use single quotes in place of double quotes for any HTML additions. Please use <br> instead of new line for fields marked with [HTML].

Field Name	Description of Field	
Amount Title	The title used to indicate the Amount section of the Aura form. There is a 39 character limit.	
Payment Title	The title used to indicate the Payment section of the Aura form. There is a 39 character limit.	
Payment Note	An optional field to add additional information below Payment Title. There is a 39 character limit.	
Payment Currency Sign	The currency symbol which will be displayed on the Amount section of the Aura form.	
Label Position	Defines the Payment section label positions. Can be set as Left, or changed to Top for a narrow Aura form.	
Width	The width of Aura form (display area in pixels).	
	Automatically calculate width if no CSS is applied.	0
	Label Position = Top	200 (minimum width)
	Label Position = Left	400 (recommended)
	Two Column Layout	900
	Maximum width	999
Pre-set Style sheet	You may select a pre-built style sheet to modify the look and feel of your Aura form if desired If using a pre-set stylesheet, please adjust the width to suite your web page. The recommended width is between 400 and 700. If you are using a pre-set stylesheet from the “Modern” series, the minimum recommended width is 600.	
Custom Style Sheet	To mimic the look and feel of the existing webpage which will host the Aura donation form, enter the full CSS URL into this field. To avoid security warnings, please ensure the CSS URL and the page URL where the Aura form is embedded are using the same protocol (https:// or http://). Note: This step is optional, however if not used, the content of the form will display on a white *background.* **Custom Stylesheet’s are not viewable within the Aura Preview option.**	
Script	This field contains the JavaScript code that needs to be pasted into the webpage where the Aura form will be embedded. This piece of coding should be embedded between any block-level HTML elements within the source code of your page. Ex: Paste between <body>…</body>, <td>…</td>, … , etc. This value does not appear until you have first saved your Form. *Note: Additional Aura customizations are possible by editing the script. For more information, please see the Aura Customization section of this User Guide.*	

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Post Back URL	A user specified URL to post Aura transaction information to Brickwork or another CRM or page. Example - Enter a valid SalesforceForce.com secure URL (HTTPS) Site to post the information into your organization's Salesforce environment. Please see the Brickwork Installation Guide for further details on how to create a Salesforce Site. *Note: Unless using a Salesforce Site, please ensure the source code is enabled to allow http "POST" action. If not done, the Post Back functions may not fire.*
Redirect URL	The URL address to redirect end users to once the transaction or recurring payment has been successfully processed. A transaction that has been Rejected will not re-direct the end user, in order to allow for changes to the incorrect information. The redirect URL should use the same protocol (https:// or http://) as the page where the Aura form is embedded. **Tips:** When creating links, there are two types of links – **relative** and **absolute**. You can tell if a link is relative if the path is not a full website address. A full website address includes http://www. Use relative links when linking to pages or files within the site. Use absolute links when linking to a location on another website. Relative is internal, absolute is external.

6.3 Payment Tab

The Payment tab enables a user to customize the Payment section of the Aura form including the accepted methods of payment, schedules, and add survey, email & security options. Please see below for a detailed description regarding each field, including character limits.

Fields marked with [HTML] indicate that HTML can be used to customize these fields to include, for example bullet lists, images, and paragraph formatting. Please use single quotes in place of double quotes for any HTML additions.

Vertical Fields	Description
Label	Fields that can be edited and will be displayed on the Aura form. Individual character limits are included in the field detail chart below. **All Label Fields have a 39 character limit unless specified.**
Visible	A checkmark box that controls the visibility of the field. If a field is not visible, it cannot be a required field.
Required	A checkmark box that controls whether the field is required or optional for the transaction to be submitted. If a field is required, it must be visible.
Message	The message which will display if a required field is left blank. **All Message fields have a 39 character limit.**

Horizontal Fields: Donor Details	Description
Title	The label used to indicate the Salutation Field for the end user.

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First Name	The label used to indicate the First Name Field for the end user. **Required recommended.** The end user can enter up to 39 characters.
Last Name	The label used to indicate the Last Name Field for the end user. **Required recommended.** The end user can enter up to 39 characters.
Address	The label used to indicate the Address Field for the end user. The end user can enter up to 99 characters.
City	The label used to indicate the City Field for the end user. The end user can enter up to 39 characters.
State / Province	The label used to indicate the State or Province Field for the end user. • The state field will be a pre-selected list if the chosen country is Canada, US, or UK. A text box will be displayed for other countries.
Country	The label used to indicate the Country Field for the end user.
Zip Code	The label used to indicate the Zip or Postal Code Field for the end user. The end user can enter up to 10 characters.
Phone	The label used to indicate the Phone Number Field for the end user. The end user can enter up to 39 digits.
Mobile	The label used to indicate the Mobile Number Field for the end user. The end user can enter up to 39 digits.
Fax	The label used to indicate the Fax Number Field for the end user. The end user can enter up to 39 digits.
Email	The label used to indicate the Email Field for the end user. **Required recommended.** The end user can enter up to 39 characters.
Re-enter Email	The label used to indicate the Second Entry Email Field for the end user. **Required recommended.** The end user can enter up to 39 characters.
Comment	The label used to indicate the Comment Field for the end user. The end user can enter up to 250 characters.
Horizontal Fields: Custom Questions	**Description**
Item 1 to 6	**The label used to indicate the Survey Questions that are visible to the end user.** **There is a 39 character limit for all Items, per question.** If Enable Select is not used, there will be plain text boxes available for the end user to type their response to your question. The end user can enter up to 79 characters in the standard text field response answer field.
Enable Select	When selected the standard open text box for question the user's response is replaced with radio or pick list responses that you pre-define. For the pre-defined responses offered in Item's 1 -6, you can offer the end user many choices (separated by the enter key) as long as each option is a max of 79 characters. The overall total characters cannot exceed 180 characters *(although we are looking at increasing this in a future release)*.
More Info	An optional field for adding additional information for each Survey Question. • Information entered into this field will display a question mark beside the

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	question. The text will be displayed in a floating window when end user moves their mouse over the question mark. There is a 300 character limit.
Display Selected Items as:	The option to display question responses (when Enable Selection is being used) as either Radio Buttons or Pick List. Default is Radio.
Horizontal Fields: Payment Details	**Description**
Credit Card	The label used to indicate the Credit Card method of payment field for the end user. • When the checkmark box is checked, the additional required Credit Card Number, Expiry Date and CVV2 (security code) fields become visible. • These field names can be edited, and have a 39 character limit. When the checkmark box is unchecked, the end user is unable to process a payment using a credit card number.
UK Cheque (Direct Debit)	The label used to indicate the GBP Direct Debit method of payment field for the end user. When the checkmark box is checked, four additional Direct Debit pages will open for the end user. These pages are a BACS requirement, and enable the end user to set-up and approve a new Direct Debit instruction. The end user is required to enter their Sort Number, Account Number information into the pages, in addition to confirming their bank's name and address. These pages cannot be edited; however your organizations SUN number must be added to the pages. This can be added via the Account Set-up section of the iATS website. • Please note that Paperless Direct Debit services must be set-up and enabled by iATS. For more information regarding Direct Debit, please contact iATS Customer Service at 0808-234-0466 or iatscs@iatspayments.com. • The Direct Debit Cancellation Policy and Declaration Statements are displayed to the end user on the Direct Debit pages, which contain additional information regarding their Direct Debit instruction. • Only recurring scheduled payments are available for Direct Debit processing. When the checkmark box is unchecked, the end user is unable to process a payment using their bank account details.
Euro SEPA (Debit)	The label used to indicate the Euro SEPA Debit method of payment field for the end user. • When the checkmark box is checked, the additional required Bank ID (for BIC), Account No. (for IBAN), and Re-enter Account No. fields become visible. These field names can be edited, and have a 39 character limit. • The end user is required to enter their BIC into the Bank ID field, and their IBAN into the Account No. fields. • The SEPA Mandate Statement details are also displayed to the end user, which contains additional information regarding their SEPA recurring donation. This information is required, and cannot be edited.

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Horizontal Fields: Payment Frequency	Description
Single Payment	The label used to indicate the Single Payment schedule field name for the end user. When the checkmark box is unchecked, the end user cannot process a single one-time transaction.
Recurring	The label used to indicate the Recurring Payment schedule field name for the end user. When the checkmark box is checked, the additional required Begin Date, End Date and Schedule Type fields become visible. These field names can be edited, and have a 39 character limit. • The end user is required to enter a Schedule Type (Weekly, Monthly, Quarterly or Annual), a Begin Date (Can be any date from today onwards for Credit Card, and one of two date options for Direct Debit), End Date (Can be any future date – Default is 50 years from today), and their bank account details. For UK Direct Debit processing, there are up to two date options that can be set-up to be displayed to the end user. • The Schedule types can be selected or unselected on an individual basis to enable or disable these options for the end user. Please note that only Monthly or Annual schedule types are available for UK Direct Debit processing. When the checkmark box is unchecked, the end user is unable to process a payment using their bank account details.
Horizontal Fields: Other Options	**Description**
Enable CAPTCHA	CAPTCHA is a security option that can be added to the Aura form. • This feature can be used to deter fraudulent processing via the form as it forces the end user to type in the alpha-numeric characters before the transaction will be attempted. It is a useful tool to prevent fraud processing via "bots", or computer programs. When the checkmark box is checked, a variety of color options are available which will be visible to the end user. *Note: The paragraph option <p> can sometimes cause issues with the Captcha function, or cause surrounding fields to be formatted incorrectly. If this occurs, remove the <p>, or add a tag between <p> and the <script> tags.*
Enable Email Notification	The options used to customize the email notifications that can be sent to the end user after a transaction has been processed, after a recurring schedule has been set-up, and for each time a recurring transaction is attempted in the future. • Please ensure a valid email address is used in the "From Email Address" section, or the email notification may not be sent properly. Due to recent **DMARC policy changes**, we recommend that you do not use a From email address which uses @aol.com, @gmail.com, @hotmail.com, or @yahoo.com. • When the checkmark box is checked, various email options become

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	available. Click the ON/OFF toggle to ON to enable any of the email options or OFF to disable them for all donors. The From Name, From Address, BCC, Email Subject and Email Body fields become visible for each five email options, as well as the customizable email body. • The Organization's name and email address should be entered in the From Name and From Address fields. • Multiple email addresses can be used in the BCC field, and should be separated by a semi-colon (;), or a comma (,). • The Subject field can be used to customize the subject of the emails which will be sent to the end user. • The Email bodies are dynamic fields, and will contain the end users transaction information (Variables enclosed in [# #]), and any other details as per the template email. The email body can be customized further using HTML and by adding additional option variable fields. For example, when John Thompson submits a donation, the [#FIRSTNAME#] variable field will display John. As list of optional fields can be found within the Customize Aura Email section of this Guide. • There is a **300 character limit** on Email Subject, From and To fields. • There is a **10,000 character limit** on the email body. To find out the number of characters entered in the email body, you can use this character count online tool: http://www.javascriptkit.com/script/script2/charcount.shtml. • Send Schedule: o Single Approved Transaction: Will be sent immediately following a successful CC transaction, or when a new ACH single transaction is submitted for processing. o Single Rejected Transaction: Will be sent immediately following a rejected Credit Card transaction. Will not be sent for any ACH Transactions. o Recurring Approved Transaction: Will be sent on the day the Credit Card recurring transaction is processed and approved. Will not be sent for recurring ACH Transactions. o Recurring Rejected Transaction: Will be sent on the day the Credit Card recurring transaction is processing and rejected. Will not be sent for recurring ACH Transactions. o Credit Card Recurring Setup: Will be sent when a new Credit Card recurring donation is scheduled. o ACH (Bank Debit) Recurring Setup: Will be sent when a new ACH recurring donation is scheduled. For more information regarding the Email customization, please see the Customize Aura Email section of this User Guide. *Note: Emails containing <img> tags may be blocked by the end user's email account due to security concerns, and may prevent the email from being read successfully. Images can be used at your discretion.*

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6.4 Amount Tab

The Amount tab enables a user to add suggested donation amounts for the end user, or enable them to donate a variable dollar amount.

In addition, the Shopping Cart features can be added and customized within the Amount tab. Please see below for a detailed description regarding each field, including character limits. **Please note that the Aura Shopping Cart is not compatible with Brickwork at this time.**

Field Name	Description of Field
Amount Label	The label used to describe the Amount of the donation for the end user. Please be informed that the use of HTML code such as tags are not supported in Amount Label fields. **All Amount Labels have a 39 character limit.**
Shopping Cart Icon	When clicked, the new shopping cart options become visible. Each item for sale can have up to two additional options (example size & color), and each option can have up to 20 choices (for example 20 size and 20 color) • Option #1 – **200 Character Limit** • Option #2 – **200 Character Limit** • Price • SKU – **40 Character limit.** Must be letters or digits only. iATS will auto-generate a new unique SKU, but you can edit to match existing internal SKU's as needed. • Quick View Button – Allows the review all options, prices and SKU's. *Note: The Shopping Cart feature is not currently available to our Brickwork users.* *To download an* iATS *Journal Report that includes the individual Shopping Cart items, please use the SalesItem.csv report provided in the Journal Tab of the* iATS *portal.*
Amount	The Dollar Amount which will be visible to the end user. Commas and currency symbols should not be included.
Enabled	A checkmark box which enables the Amount Label and Amount to be visible to the end user.
Other Amounts	The label used to describe the Amount Label and variable amount options for the end user. When Enabled, the end user can enter any dollar amount they wish. If required, a minimum can be set. iATS recommends using a minimum of at least £1.00. If less than £1.00 is attempted to be donated, this will produce a rejection and the transaction will not be processed. • A description detailing the minimum amount can be added to the Message field. **There is a 39 character limit.** • In addition, an Error Message can be customized should the end user enter an amount that is less than the minimum specified. **There is a 39 character limit.**
Enable Multi-Selection & Enable Quantity	A checkmark box which enables the older version of our Shopping Cart feature. • This feature enables the end user to select multiple items during, which will be totaled and processed as one transaction. • To enable the end user to be able to select multiple quantities within a specific selection, add a checkmark to the Enable Quantity checkmark box. *Note: The Shopping Cart feature is not currently available to our Brickwork users.* *To download an* iATS *Journal Report that includes the individual Shopping*

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	Cart items, please use the SalesItem.csv report provided in the Journal Tab of the iATS *portal.*
Quantity Label	The label used to describe the Quantity field when enabled. All Quantity **Labels have a 39 character limit.**
Default Quantity & Default	Checkmark boxes which control if an Amount category is pre-selected for the end user, and a particular Amount level. When unchecked, the end user must select an Amount category. Multiple Amounts can be pre-selected if Enabled Multi-Selection checkmark box is checked. If Multi-Selection checkmark box is not checked, only the last amount with Default checkmark box checked will be pre-selected.
Error Message	The Error Message which is displayed to the end user if they do not select an Amount category when the Default Selected checkmark box is unchecked. **There is a 39 character limit.**

6.5 Response Tab

The Response tab enables a user to customize the messages that are visible to the end user once their transaction has been approved or declined, and when a recurring schedule has been set-up.

Please see below for a detailed description regarding each field, including character limits.

Approval Response Message:

Field Name	Description of Field
Approval Header	The primary message that will be displayed to the donor following an approved payment. There is a 399 character limit.
Approval Code	A message that will be displayed to the end user, followed by the iATS generated authorization code.
Approval Amount	A message that will be displayed to the end user, followed by the dollar amount of the transaction.
Approval Footer	An optional secondary message that will be displayed to the donor following an approved payment. There is a 399 character limit.

Decline Response Message:

Field Name	Description of Field
Decline Header	The primary message that will be displayed to the donor following a declined payment. There is a 399 character limit.
Decline Code	A message that will be displayed to the end user, followed by the iATS generated decline code.
Decline Reason	Text fields which allow the Declined Transaction rejection responses to be customized for the end user. There is a 79 character limit. *Note: To ensure correct decline information is displayed to the end user, it is recommended to maintain existing message information when translating to another language or when additional information is added.*
Decline Footer	An optional secondary message that will be displayed to the donor following a declined payment. There is a 399 character limit.

Recurring Response Message:

Field Name	Description of Field
Recurring Header	The primary message that will be displayed to the donor following a recurring schedule set-up. There is a 399 character limit.

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Recurring Code	A message that will be displayed to the end user, followed by the iATS generated Customer Code.
Recurring Footer	An optional secondary message that will be displayed to the donor following a recurring schedule set-up. There is a 399 character limit.

6.6 Share Tab

The Share tab enables the Aura form to be shared or embedded in a variety of Social Media tools, and secondary websites.

Please see below for a detailed description regarding each field.

Field Name	Description of Field
Social Sharing	The checkmark box that enables the Aura form to be shared via social media outlets such as Facebook, Twitter, blogs, pages/feeds, and email sharing. These will appear as links at the bottom of the form.
Link to Form	The full URL where the Aura form has been embedded should be entered into this field. This value is only used for Facebook and Twitter, and it is not included as part of Email Message (see below).
Link Title	The Title of the link option above.
Email Message	The message that will be displayed in the when using the email sharing feature. There is a 20K (20 x 1024) character limit. Ensure to include the Aura form URL to direct an end user to the form.
Advanced Sharing	Allows the Aura form to be embedded into additional websites. If the checkmark box is checked, the end user can insert the Aura form into other websites.

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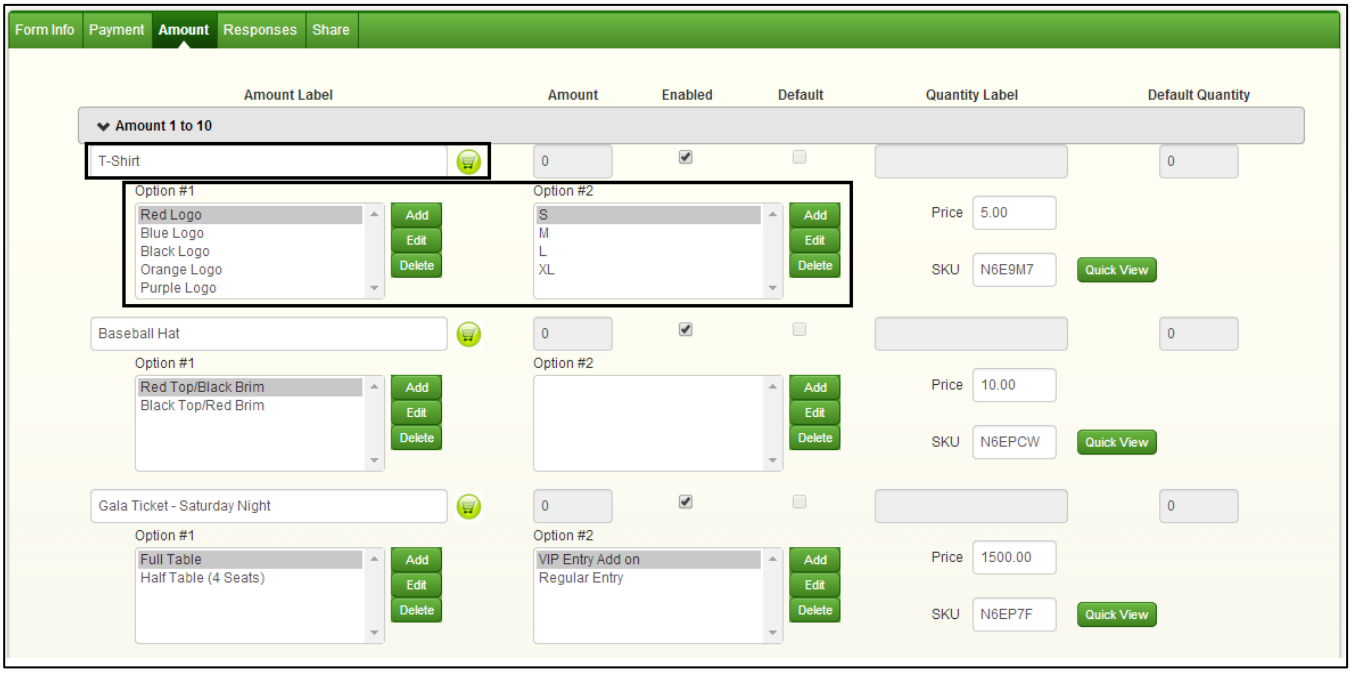
7 Building a Shopping Cart

Aura offers Shopping Cart capabilities which includes up to 20 individual payment levels with the benefit of being able to add two unique options per level. Please note that the Aura Shopping Cart is not compatible with Brickwork at this time.

For example, the cart below has been built to sell a T-Shirt, Baseball Hat, and Tickets to a Gala. The first three payment levels are being utilized, and in the case of the T-Shirt and Gala Ticket items, Options #1 and #2 to offer the end user additional options such as size, color or seating arrangements etc.



In addition, each item will receive its own unique SKU code to keep track of the different prices and options available for sale. These codes can be changed to reflect existing SKU's that may already exist within your organization if preferred.

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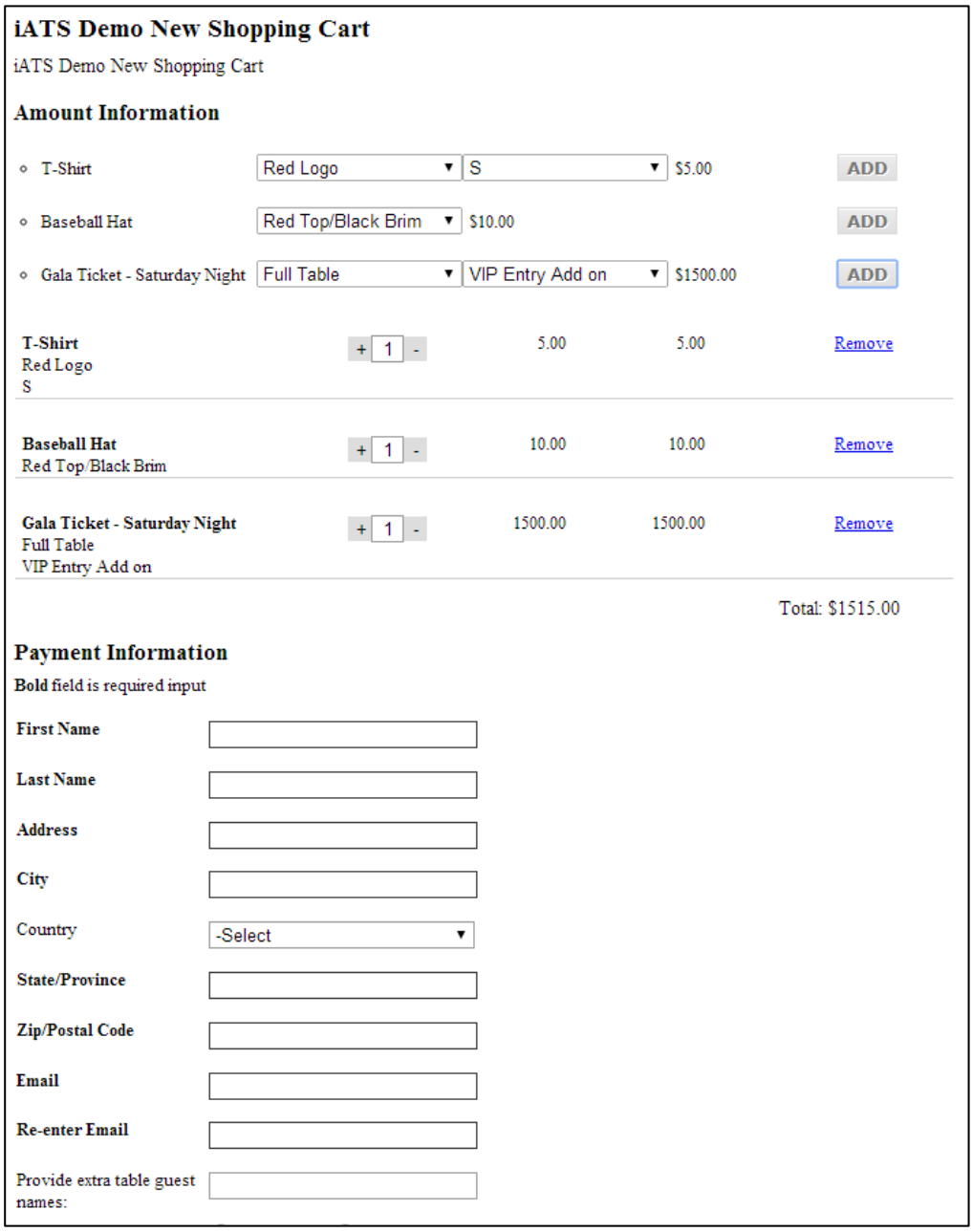
Preview of form with Shopping Cart features enabled (with no CSS style sheet applied):



iATS Demo New Shopping Cart

iATS Demo New Shopping Cart

Amount Information

◦ T-Shirt	Red Logo ▼	S ▼	$5.00	ADD
◦ Baseball Hat	Red Top/Black Brim ▼	$10.00		ADD
◦ Gala Ticket - Saturday Night	Full Table ▼	VIP Entry Add on ▼	$1500.00	ADD

T-Shirt Red Logo S	+ 1 -	5.00	5.00	Remove
Baseball Hat Red Top/Black Brim	+ 1 -	10.00	10.00	Remove
Gala Ticket - Saturday Night Full Table VIP Entry Add on	+ 1 -	1500.00	1500.00	Remove

Total: $1515.00

Payment Information

Bold field is required input

First Name	
Last Name	
Address	
City	
Country	-Select ▼
State/Province	
Zip/Postal Code	
Email	
Re-enter Email	
Provide extra table guest names:	

Please note: *Each option has a 200 character limit, however longer labels may require you to expand the Width of the form (field located on Form Info tab), and apply custom CSS styling to adjust the height of each option.*

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7.1 Shopping Cart Reporting

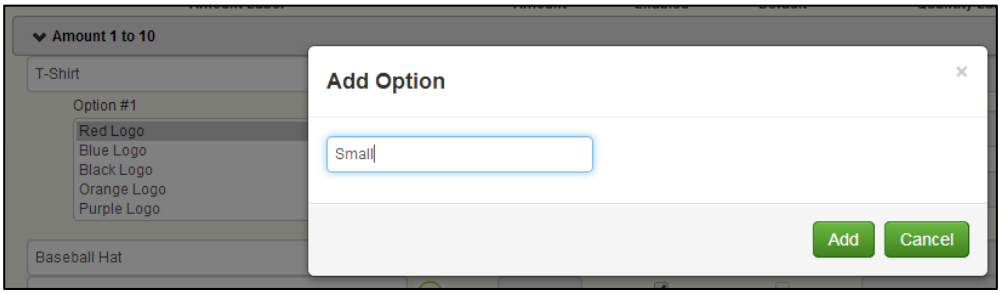
The iATS Portal reports at http://www.uk.iatspayments.com/ include details on the Items and Options associated with your shopping cart options. Specifically the daily and date-span Sales Item.CSV export reports located within the Journal tab can be run for both Credit Card and ACH methods of payment.

For more information regarding the iATS Portal Reporting features, please contact iATS Customer Care.

7.2 Steps to create a form with shopping cart features:

1. Create an Aura form as per the steps at the top of this guide. The shopping cart features are added via the Amount tab.
2. On the Amount tab, expand the Amount 1 – 10 section, and add a Label in Level 1, for example T-Shirt.
3. Click the shopping cart icon and click the Add button to enter Option #1 details if required.

4. Once you have added all Option #1 details, click on the Add button beside the Option #2 area. Please ensure that you have first clicked on the appropriate Option #1 item before adding Option #2. For example:



5. If no Option #2 is being used, or once Option #2 has been added, click into the Price box (not the Amount box) and add the value of the item. The SKU can be edited if needed at this point.

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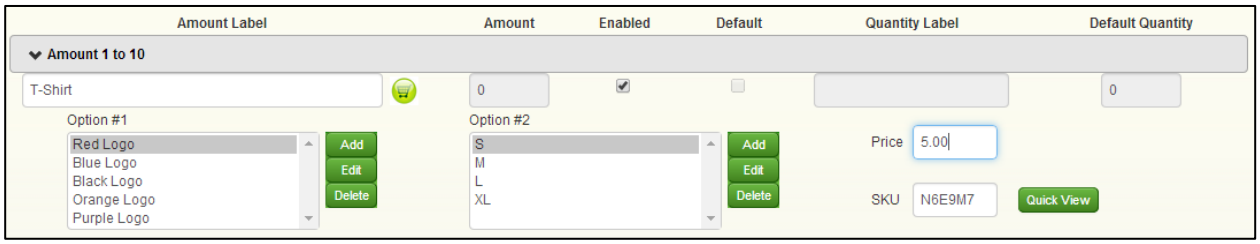

6. To ensure all Options and prices have been added, click the Quick View button.
7. Remember to click the Save Form button at the top of the page to save your Aura form!
8. You may also click the Preview button to review the cart options. Note that you may also expand the width of the form by adjusting the Width field, found on the Form Info tab.

8 Embedding the Aura Script

In order to display the newly created Aura form online to your donors, the script needs to be embedded into an HTML website. The JavaScript is created when the Aura form is saved, and is displayed in the Script field on the Form Info tab.

Note: Aura is currently not designed to be used with IFRAME due to issues with the ability to include secure content and cross domain issues.

To embed the script, open the desired HTML file and paste the code directly into the web page. Place the script inside any block level HTML element, such as:

<body>……</body>

<td>……</td>

<form>……</form>

……

……

The Aura form will inherit the basic settings of the HTML page including font color, size and type. In the default setting, the Aura form is transparent to allow it to use the HTML background color or image.

Below is an example of an HTML file with an embedded Aura form. The code in bold is the inserted Script:

```
<!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Transitional//EN"
"http://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd">
<html xmlns="http://www.w3.org/1999/xhtml" >
<head>
   <title>Aura Page</title>
</head>
<body>
```


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```
<script type="text/javascript"
src="https://www.iatspayments.com/AURA/AURA.aspx?PID=PAD7CB425DACABBAE9"></script
>
</body>
</html>
```

Note: Due to Google code conflicts related to our CAPTCHA security option, we do not recommend the script be placed between ... . Google Chrome users may experience functionality issues when included.

9 Aura Customization

9.1 Adding and/or Hiding Static Defaulted Values

The Aura form can be enhanced further to allow default values to be added directly within the script once it has been embedded within the webpage or via the URL of the webpage directly. These defaulted values will be visible to the end user unless additional hidden values are included within the script (**certain values only**).

9.1.1 Method 1: Adding values via the Script directly

The below table of variables can be appended to the value of the 'src' tag in the script, following the PaymentBoxPID variable by using the following format **&[variable]=[value]**.

For example, to default the Country field value to **US**:

- Copy of the original script copied from the Aura setup page:

```
<script type="text/javascript"
src="https://www.iatspayments.com/AURA/AURA.aspx?PID=PACE4C7CC915152DCB"></script>
```

- Copy of the script after appending the default values to set the default Country field to US:

```
<script type="text/javascript"
src="https://www.iatspayments.com/AURA/AURA.aspx?PID=PACE4C7CC915152DCB&Country=US"
></script>
```

To hide fields within the Payment section and therefore the defaulted value, un-check the "Visible" checkbox beside the field within Aura setup. Even though the field is hidden, the defaulted value is still pushed to iATS.

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Please note that some Recurring Schedule fields do not have a "Visible" checkmark option, such as the End Date. In order to hide these values (only values indicated in table below), specific variables can be hidden by using the following format: **&[Hidevariable]=[True]**

For example, to hide the Recurring End Date:

- Copy of the script after hiding the defaulted End Date:
  <script type="text/javascript"
  src="https://www.iatspayments.com/AURA/AURA.aspx?PID=PACE4C7CC915152DCB&HideRecurringEndDate=True"></script>

The following input fields can be defaulted with specific values for the end user using the script method above:

Variable to use for Defaulting option	Defaulted Field	Additional Information
FirstName	First Name	
LastName	Last Name	
Address	Address	
Country	Country	**For Example:** **US** for United States **CA** for Canada **GB** for United Kingdom *Note: Any country can be set as default, and should use the Country name as listed within the Country drop down menu.*
City	City	
State	State	*Note: State name or state code can be used as default value if the Country is US/CA/UK. Both are acceptable.* *For **US** example:* *AK or Alaska = both values will work* *For **CA** example:* *BC or British Columbia = both values will work*
City	City	
ZipCode	Zip Code	
Fax	Fax	
Phone	Phone	
Phone2	Mobile	
EMail	Email	Use variable as capital "E" and "M", and lower case "ail".
ReEnterEmail	Re-enter Email	
Comment	Comment	
Item1, Item2, Item3, etc.	Item's 1 through 6 (Survey Answer Text Box Fields)	Applies to the survey answer **text** field (not visible in the Aura set-up payment tab). When the Items are utilizing the radial or pick list options they cannot be defaulted.

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BeginDate **	Beginning Date	Date must be entered in format: **mm/dd/yyyy** ******Note: Only the FULL begin date can be set as a default. For example, you cannot default the day or month only. Date cannot roll forward.
EndDate	Ending Date	Date must be entered in format: **mm/dd/yyyy** Note: Only the FULL end date can be set as a default. For example, you cannot default the day or month only. Date cannot roll forward.
RedirectTime	Sets value for the length of time Redirect page displays (In milliseconds)	**2000** (2 seconds) by default. Accepted range is from **100** (0.1 seconds) to **15000** (15 seconds).
TotalAmount	Sets the total Amount of the end user's payment.	The default TotalAmount will only be displayed when HideAmountInfo is set true.
TotalDescription	For example "Total:"	Set the value for the total description.

The following fields can be hidden from the end user using the script method above:

Variable to use for Hidding option	Defaulted Field	Additional Information
HideRecurringEndDate	Hides Recurring End Date visibility	Use true to hide the recurring End Date field.
HideAmountInfo	Hides the Amount section. End user cannot select an amount.	Use true to hide Amount section of the Aura form.
HideWeekly	Hide weekly recurring schedule type.	Use true to hide the weekly recurring.
HideMonthly	Hide monthly recurring schedule type.	Use true to hide the monthly recurring.
HideQuarterly	Hide quarterly recurring schedule type.	Use true to hide the quarterly recurring.
HideAnnually	Hide annually recurring schedule type.	Use true to hide the annually recurring.

9.1.2 Method 2: Adding to URL

The below table of variables can be appended to the URL by using the following format:

?**[variable]=[value]**.

For example, to default the Country field value to **US**:
http://home.iatspayments.com/test?Country=US

Using this method you have the option of utilizing the BELOW table of values, but may also add your own custom fields if desired. Please note these custom fields will be sent to iATS and included in the "Aura Post Back" contents if collecting data via post, however does not interact with our Salesforce application Brickwork.

- For example, to default a custom field to **Generic Annual Appeal**:

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http://home.iatspayments.com/test**?FundName=GenericAnnualAppeal**

- To combine variables include an "&" ampersand after each entry, such as:
  http://home.iatspayments.com/test**?IATS_PaymentItemInput_Country=US&FundName=GenericAnnualAppeal**

The following input fields can be defaulted with specific values for the end user using the URL method above:

Variable to use for Defaulting option	Defaulted Field	Additional Information
Title	Title	Values accepted: **Mr.** = Mister **Mrs.** = Missus **Ms.** = Miss **Dr.** = Doctor **Prof.** = Professor **Rev.** = Reverend **Other** = Other *Note: These values are case sensitive and it should be added exactly as indicated above.*
FirstName	First Name	
LastName	Last Name	
Address	Address	
City	City	
State	State	*Note: State name or state code can be used as default value if the Country is US/CA/UK. Both are acceptable.* For **US** example: AK or Alaska = both values will work For **CA** example: BC or British Columbia = both values will work
Country	Country	Values accepted: **US** for United States **CA** for Canada **GB** for United Kingdom *Note: Any country can be set as default, and should use the Country code (not*

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		the Country name). For example: **FR** for France **DE** for Germany
ZipCode	Zip Code	
Phone	Phone	
Phone2	Mobile	
Fax	Fax	
EMail	Email	Use variable as capital “E” and “M”, and lower case “ail”.
ReEnterEmail	Re-enter Email	
Comment	Comment	

9.2 Pre-populating Dynamic Values

The Aura form can be customized to pre-populate dynamic values for the end user. For example, if a member is signing up for a yearly membership, a series of questions can be asked on a prior web-page. Depending on the responses to the questions, a different dollar amount can be pre-populated in the Total field.

You can pre-populate values by appending additional values to the script or the page URL where the Aura form is embedded. All variables can be appended by using the following format: **&[variable]=[value].** The variables' names must be standard ones within the default tables above in order to pre-populate the proper values.

For example, if the page URL where Aura form is embedded is https://www.SAMPLE.com, the correct method to pre-populate the first name and last name is to update the URL to https://www.SAMPLE.com?Firstname=first name&LastName=last name.

Note: Please be aware that if the same variable is appended to both Aura script and page URL, the values within the Aura script will be overwritten.

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9.3 Email Customization

Additional customizations can be applied to the Notification Email that is sent to the end user.

When the variables listed below are added to the Email set-up, the information will be contained within the body of the email.

If the end user did not provide information in the field, for example if the Comment field was left blank, the variable field within the email body ([#COMMENT#]) will contain a blank space. To avoid this, the field can be marked as required in the Aura Setup.

Note:

- *Emails containing <img> tags may be blocked by the end user's email account due to security concerns, and may prevent the email from being delivered successfully. Images can be added at your discretion.*
- *The below values are case sensitive. Please use only uppercase letters as per table.*

Optional Variables	Comments
[#FIRSTNAME#]	First Name
[#LASTNAME#]	Last Name
[#TITLE#]	Title
[#EMAIL#]	Email Address
[#ADDRESS#]	Street Address
[#CITY#]	City
[#STATE#]	State/Province
[#ZIPCODE#]	Zip/Postal Code
[#COUNTRY#]	Country
[#PHONE#]	Phone Number
[#MOBILE#]	Mobile/Cell Number
[#FAX#]	Fax Number
[#COMMENT#]	Comment Line
[#ITEM1#]	Survey Question Label, Item 1
[#ITEM2#]	Survey Question Label, Item 2
[#ITEM3#]	Survey Question Label, Item 3
[#ITEM4#]	Survey Question Label, Item 4
[#ITEM5#]	Survey Question Label, Item 5
[#ITEM6#]	Survey Question Label, Item 6
Note that the donor's responses cannot be included in the email at this time.	
[#ACCOUNTNUMBER#]	Portion of Bank Account or Credit Card Number
[#ACCOUNTTYPE#]	Account Type (Checking/Saving)

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[#AGENCYNAME#]	Organization Name
[#CUSTOMERCODE#]	Recurring Donation Customer Code Token
[#AUTHCODE#]	Authorization/Rejection Code for Transaction
[#AMOUNT#]	Total Dollar Amount
[#TRANSACTIONDATE#]	Date of Transaction
[#SHOPPINGCARTTABLE#]	Details when using the Shopping Cart option. Includes: Product Name, Option1, Option2, SKU, Quantity, Price, Quantity Price
[#AMOUNTITEM1#]	Amount Label 1
[#AMOUNTITEM2#]	Amount Label 2
[#AMOUNTITEM3#]	Amount Label 3
[#AMOUNTITEM4#]	Amount Label 4
[#AMOUNTITEM5#]	Amount Label 5
[#AMOUNTITEM6#]	Amount Label 6
[#AMOUNTITEM7#]	Amount Label 7
[#AMOUNTITEM8#]	Amount Label 8
[#AMOUNTITEM9#]	Amount Label 9
[#AMOUNTITEM10#]	Amount Label 10
[#AMOUNTITEM11#]	Amount Label 11
[#AMOUNTITEM12#]	Amount Label 12
[#AMOUNTITEM13#]	Amount Label 13
[#AMOUNTITEM14#]	Amount Label 14
[#AMOUNTITEM15#]	Amount Label 15
[#AMOUNTITEM16#]	Amount Label 16
[#AMOUNTITEM17#]	Amount Label 17
[#AMOUNTITEM18#]	Amount Label 18
[#AMOUNTITEM19#]	Amount Label 19
[#AMOUNTITEM20#]	Amount Label 20

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9.4 Adding Images to Description using HTML

Format for placing an image:

<IMG SRC='image.gif' ALT="some text" WIDTH=32 HEIGHT=32>

Note: The value in width and height are just examples. The ALT stands for 'alternate text'. It tells the browser that if it cannot find the image, it just displays the text. It also tells what the image is about if anyone cannot view the image.

- SRC stands for "source". This is an attribute. It's telling the browser where to go to find the image. You will need to indicate the full URL of the image in the source attribute.

For example: src=http://www.testwebsite.org/publicImages/thumb_donorbutton2.jpg

Note: The URL of the image above is just an example. You will need to provide the correct URL.

- Please note that when adding an image in the Description box, the URL value in SRC should be enclosed in single quotes and not double quotes.

To make the image work in the Description box, here is the correct code:

```
<h2>

<img src='http://www.testwebsite.org/publicImages/thumb_donorbutton2.jpg'
alt="donorbutton2.jpg" title="donorbutton2.jpg" border="0" height="59" width="250"
/>OnlineDonations for the Annual Fund of the Generic Foundation

</h2>
```

The following are basic image formats (and recommended) on the web:

- GIF
- JPEG or JPG
- PNG

If you have any questions regarding adding images using HTML, please contact iATS Customer Care at 0808-234-0466, or iatscs@iatspayments.com.

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10 FAQ's

Security

Q: Is my Aura form secure?

A: Yes, all data entered into the Aura form is secure. All communications initiated by this form are transmitted via Transport Layer Security (TLS). The TLS protocol is the new industry standard method for creating an encrypted, secure connection between your web browser and a web server. We retired SSL Version 3 in January 2015.

Q: Does the webpage that hosts my Aura form need to be https rather than http?

A: Yes, even though the Aura form is secured by iATS Payments, it is best practice to certify your website as be https for added protection.

Aura Set-Up

Q: What iATS Client Code should be used as the "Process Sub Code" within the Aura Set-up?

A: When the Aura services are enabled on your iATS Merchant Account, you should be issued an 80 sub-code for use with Aura. An 80 level code is designed to be used with Aura, and is capable of processing both Single and Recurring scheduled transactions. If applicable, the ACH/EFT services can also be applied to this sub-code.

In addition, sub-codes 81-89 can also be requested from iATS Customer Care for use with Aura.

Q: Why does my Aura Form display all of the fields in a small box on the left hand side?

A: Check the Width within the Aura Set-up. If the width is 0, this has caused the issue. The default and recommended width is 400 or 600 if using a pre-set stylesheet in our Modern series.

Q: The form fields appear to be out of alignment or staggered, and I can't fix the issue by adjusting the width of the Aura form.

A: If the Captcha feature is enabled on the form, ensure that the paragraph marker or has not been added to the Aura script after inserted into your webpage. Either remove the and , or add a tag between the and the <script> tags as per the example below:

```
<p><script type="text/javascript"
src="https://www.iatspayments.com/AURA/AURA.aspx?PID=PA30B4BAB843D77698"></script></p>
```

OR

```
<p><div><script type="text/javascript"
src="https://www.iatspayments.com/AURA/AURA.aspx?PID=PA30B4BAB843D77698"></script></div></p>
```

Q: I've added a Post Back URL to direct my donors to an alternate website once their transaction approves, but it isn't working properly.

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A: First, ensure the URL that has been added is valid. If so, please ensure the source code is enabled to allow http "POST" action. If not done, the Post Back functions may not fire.

Q: Can I look at the source code for the pre-set stylesheets?

A: Sure, we've provided the code for "BasicStyle", "CyanLight", and "Modern-Playful" below, but if you'd like others please reach out to iATS Customer Care.

BasicStyle:

https://www.iatspayments.com/PaymentBox/css/IATSPaymentBoxBasic.css

CyanLight:

https://www.iatspayments.com/PaymentBox/css/CyanLight.css

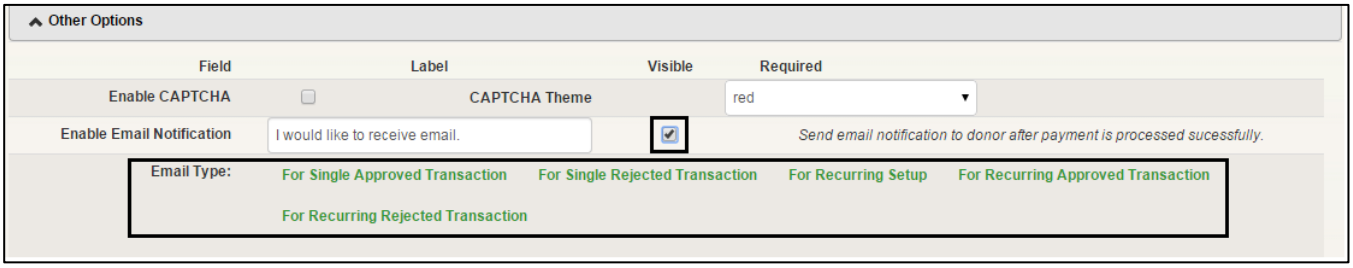
Modern-Playful:

https://www.iatspayments.com/PaymentBox/css/Modern-Playful.css

Email Notification

Q: When will the end user receive an email confirmation of their transaction?

A: If enabled, the end user will receive an email confirmation when the transaction is successfully charged, rejected, or when a recurring schedule is setup via Aura.



- For Single Approved Transactions: Email will be sent immediately when a one-time CC or ACH transaction is approved.
- For Single Rejected Transactions: Email will be sent immediately when a one-time CC transaction is rejected.
- For Recurring Setup: Email will be sent when a new Customer Code token is created via Aura for recurring processing.
- For Recurring Approved Transaction: Email will be sent when a recurring CC or ACH transaction is approved.
- For Recurring Rejected Transaction: Email will be sent when a recurring CC transaction is rejected.

Q: Can I stop the emails from being sent to one donor in particular?

A: Yes, you can stop emails from being sent to a donor by removing their email address from the iATS Customer Code token that we use to process their recurring transactions.

Q: Can my organization be sent a copy of each email that is sent to the end user?

A: Yes, your organization can specify a BCC (Blind Carbon Copy) email address in the email portion of the Aura set-up. This address will be copied on all emails to the end user.

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Q: Why are my email notification's not working?

A: Please ensure that a valid "From" email address has been included within the Aura Email Setup section.

Aura Testing

Q: Do I have to use a real credit card number for testing purposes?

A: If you wish to test your Aura Form which has been built using your iATS Merchant Account information, a real credit card number should be used for testing. Using fake credit card numbers will not result in an accurate response.

Alternatively, iATS can provide you with a Testing Merchant Account (AURA88), which can be used in conjunction with fake credit card information. This account has been set-up to produce fake Approval and Rejection responses based on the dollar amount used. Click here for the AURA88 testing details.

Google Analytics

Q: Can I add Google Analytics to my Aura page?

A: Google Analytics can be added to your webpage to monitor traffic to the page which hosts the Aura form, however data cannot be gathered from the Aura form itself, for example when a donor clicks the "Submit" button.

Although you are able to place the Google Analytics code on the site page where the Aura form is hosted, the information that the donors enter on the Aura form as well as the "submit" button for processing the donation, would not post or refresh the page to correspond with the analytics offered by Google.

Pixel Conversion Analytics

Q: Can I add Pixel Conversion Analytics to my Aura page?

A: Pixel Conversion can be added to your webpage to monitor traffic to the page which hosts the Aura form, however as you cannot insert outside script into the actual Aura portion of the page (this is how the Pixel Conversion is applied), the tool cannot be added.

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