



## North American User Guide for



North American Aura User Guide

Last Updated: June 19<sup>th</sup>, 2017

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## 2 Document Version

Document	Change	Date of Change:
Aura NA Guide	<ul style="list-style-type: none"> <li>Added new features from the June 2017 version release including details on these release notes.</li> </ul>	June 1 <sup>st</sup> , 2017
Aura NA Guide	<ul style="list-style-type: none"> <li>Added new features released for Version 2 including expanded character limits, four new "Other" payment options, and corrected default by URL variables.</li> </ul>	Nov 17 <sup>th</sup> , 2015
Aura NA Guide	<ul style="list-style-type: none"> <li>Added URL Pre-populate/default table values.</li> </ul>	June 23 <sup>rd</sup> , 2015
Aura NA Guide	<ul style="list-style-type: none"> <li>Added details on new Aura /Clone Copy options and general updates.</li> </ul>	May 20 <sup>th</sup> , 2015
Aura NA Guide	<ul style="list-style-type: none"> <li>Added new Email Notification options and updated screenshots</li> </ul>	Nov 26 <sup>th</sup> , 2014
Aura NA Guide	<ul style="list-style-type: none"> <li>Updated Amount section to include new Spring 2014 Shopping Cart release</li> </ul>	May 26 <sup>th</sup> , 2014
Aura NA Guide	<ul style="list-style-type: none"> <li>Updated Portal Screenshots</li> </ul>	Mar 10 <sup>th</sup> , 2014

## 3 iATS Payments Contact Information

North America: [www.iatspayments.com](http://www.iatspayments.com)

UK/Europe: [www.uk.iatspayments.com](http://www.uk.iatspayments.com)

### Customer Care:

Email: [iatscs@iatspayments.com](mailto:iatscs@iatspayments.com)

Phone: North America: 1-888-955-5455 | UK/Europe: 0808-234-0466

Hours: 7:30am – 5:00pm Pacific Standard Time, Monday to Friday

### Sales and Marketing:

Email: [sales@iatspayments.com](mailto:sales@iatspayments.com)

Phone: North America: 1-888-955-5455 | UK/Europe: 0808-234-0466

Hours: 7:00am – 4:30pm Pacific Standard Time, Monday to Friday

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](#).

## 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.

## 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.

### Demo Donation Form

This is our fundraising form

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**Membership Options**

Attend Summer Class \$50.00

Donation - Level Gold \$1000.00

Donation - Level Silver \$500.00

Donation - Level Bronze \$100.00

I'd like to give another amount:  Minimum \$10

---

**Donor Title**

Donor Information

Title

First Name  Last Name

Address

City  Country

State

Zip  Phone

Cell

Email  Re-enter Email

Comment

Class Choice  Is this a matching donation?

What Fund do you wish to contribute to?

One Time  Recurring

Credit Card  Bank Withdrawal

---

Card Number

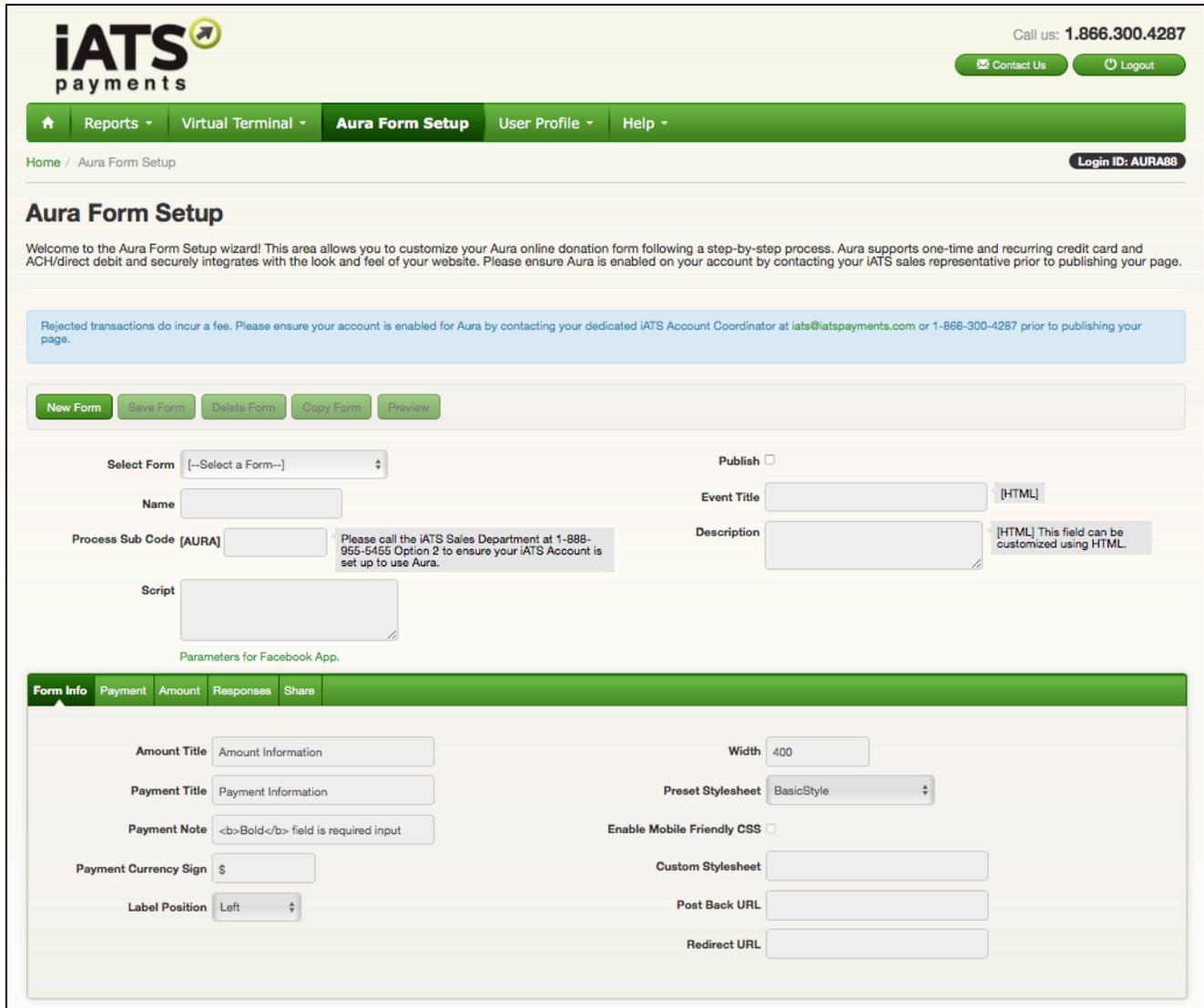
Expiry   CVV2

**Submit**

---

SHARE: [Email](#) | [Facebook](#) | [Twitter](#)

1. To create an Aura Form log into our website [www.iatspayments.com](http://www.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.



**iATS payments** Call us: **1.866.300.4287**  
Contact Us Logout

Home / Aura Form Setup **Login ID: AURA88**

### Aura Form Setup

Welcome to the Aura Form Setup wizard! This area allows you to customize your Aura online donation form following a step-by-step process. Aura supports one-time and recurring credit card and ACH/direct debit and securely integrates with the look and feel of your website. Please ensure Aura is enabled on your account by contacting your iATS sales representative prior to publishing your page.

Rejected transactions do incur a fee. Please ensure your account is enabled for Aura by contacting your dedicated iATS Account Coordinator at [iats@iatspayments.com](mailto:iats@iatspayments.com) or 1-866-300-4287 prior to publishing your page.

New Form Save Form Delete Form Copy Form Preview

Select Form: [--Select a Form--]  Publish

Name:  Event Title:  [HTML]

Process Sub Code [AURA]:  Please call the iATS Sales Department at 1-888-955-5455 Option 2 to ensure your iATS Account is set up to use Aura. Description:  [HTML] This field can be customized using HTML.

Script:   
Parameters for Facebook App.

**Form Info** | Payment | Amount | Responses | Share

Amount Title:  Amount Information Width:  400

Payment Title:  Payment Information Preset Stylesheet:  BasicStyle

Payment Note:  <b>Bold</b> field is required input Enable Mobile Friendly CSS:

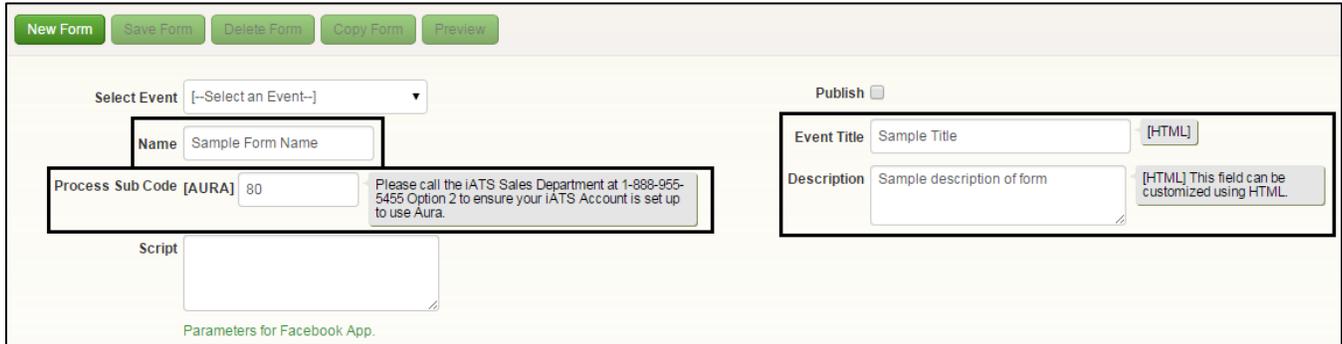
Payment Currency Sign:  \$ Custom Stylesheet:

Label Position:  Left Post Back URL:

Redirect URL:

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.

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 preferred, 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. **\*\* New for Spring 2017:** If using one of the "Modern" stylesheets, you now have the option of enabling Mobile Friendly CSS! Simply check the box to optimize the CSS for mobile devices.
10. 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.
11. 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.



12. Click on the Payment tab.
13. The Payment Tab comprises five sections which can be customized if desired (Donor Details, Custom Questions, Payment Details, Payment Frequency, and Other Options).
14. 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.
15. If desired, the Label and Message field text can be modified to allow for additional customization.

Form Info <b>Payment</b> Amount Responses Share					
^ Donor Details					
	Field	Label	Visible	Required	Message
	Title	Title	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Title is Required
	First Name	First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	First Name is Required
	Last Name	Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Last Name is Required
	Company Name	Company Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Company Name is Required
	Address	Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Address is Required
	City	City	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	City is Required
	Country	Country	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Country is Required
	State/Province	State/Province	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	State/Province is Required
	Zip/Postal Code	Zip/Postal Code	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Zip/Postal Code is Required
	Phone	Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Phone is Invalid
	Mobile	Mobile	<input type="checkbox"/>	<input type="checkbox"/>	Mobile is Invalid
	Fax	Fax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Fax is Invalid
	Email	Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Email is Required
	Re-enter Email	Re-enter Email		<input checked="" type="checkbox"/>	Email address entries must match.
	Comment	Comment	<input type="checkbox"/>	<input type="checkbox"/>	Comment is Required
v Custom Questions					
v Payment Details					
v Payment Frequency					
v Other Options					

16. 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.

**\*\* New for Spring 2017:** Aura now offers more Custom Questions! You now can use up to 15 custom questions for increased donor data collection.

17. 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.

Form Info
**Payment**
Amount
Responses
Share

▼ Donor Details

▲ Custom Questions

Field	Label	Visible	Required	Enable Select	Message	
Item 1	Item 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Item 1 is Required	<a href="#">More Info</a>
Item 2	Item 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Item 2 is Required	<a href="#">More Info</a>
Item 3	Item 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Item 3 is Required	<a href="#">More Info</a>
Item 4	Item 4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Item 4 is Required	<a href="#">More Info</a>
Item 5	Item 5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Item 5 is Required	<a href="#">More Info</a>
Item 6	Item 6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Item 6 is Required	<a href="#">More Info</a>
Item 7	Item 7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Item 7 is Required	<a href="#">More Info</a>
Item 8	Item 8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Item 8 is Required	<a href="#">More Info</a>
Item 9	Item 9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Item 9 is Required	<a href="#">More Info</a>
Item 10	Item 10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Item 10 is Required	<a href="#">More Info</a>
Item 11	Item 11	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Item 11 is Required	<a href="#">More Info</a>
Item 12	Item 12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Item 12 is Required	<a href="#">More Info</a>
Item 13	Item 13	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Item 13 is Required	<a href="#">More Info</a>
Item 14	Item 14	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Item 14 is Required	<a href="#">More Info</a>
Item 15	Item 15	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Item 15 is Required	<a href="#">More Info</a>

Display Selected Items as: Radio Buttons

▼ Payment Details

▼ Payment Frequency

▼ Other Options

18. Expand the Payment Details section to choose the methods of payment and payment schedule options for your form.

Form Info <b>Payment</b> Amount Responses Share					
▼ Donor Details					
▼ Custom Questions					
▲ Payment Details					
Field	Label	Visible	Required	Message	
Credit Card	Credit Card	<input checked="" type="checkbox"/>			
Credit Card Number	Card Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Card Number is Required	
Expiry Date	Expiry	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Expiry is Required	
CVV2	CVV2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CVV2 is Required	
US Checking	Bank Withdrawal	<input checked="" type="checkbox"/>			
Routing No.	Routing No.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Routing No. is Required	
Account No.	Account No.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Account No. is Required	
Re-enter Account No.	Re-enter Account No.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Account number entries must match.	
CDN Cheque	Bank Withdrawal	<input type="checkbox"/>			
▼ Payment Frequency					
▼ Other Options					

19. 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.
20. To accept single "one-time" donations, check the "Visible" option next to the Single Payment frequency.

Form Info <b>Payment</b> Amount Responses Share					
▼ Donor Details					
▼ Custom Questions					
▼ Payment Details					
▲ Payment Frequency					
Field	Label	Visible	Default Begin Date to Current Date	Message	
Single Payment	One Time	<input checked="" type="checkbox"/>			
Recurring	Recurring	<input type="checkbox"/>			
▼ Other Options					

21. If enabling “recurring” payment schedules, check the “Visible” option next to the Recurring frequency.
- \*\* New for Spring 2017:** This will expand the lower portion of the screen and display a number of other fields and options. These are all new for Spring 2017, and offer an array of new customization for recurring payment processing related to Schedule Dates and Defaults. See below for a description of each new field and option.

Payment Frequency				
Field	Label	Visible	Default Begin Date to Current Date	Message
Single Payment	One Time	<input checked="" type="checkbox"/>		
Recurring	Recurring	<input checked="" type="checkbox"/>		
Begin Date	Begin Date	<input checked="" type="checkbox"/>		Begin date must be today or later
End Date	End Date	<input checked="" type="checkbox"/>		End date must be later than begin date
Schedule Type	Schedule Type	<input checked="" type="checkbox"/>		
	Enable to restrict available begin date options			<input type="checkbox"/> OFF
	Choose which schedule type is selected by default			Weekly
Weekly	Weekly	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	Default Begin Date			Sunday
	Default End Date			+50 Year(s)
Monthly	Monthly	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	Default Begin Date			1
	Default End Date			+50 Year(s)
Quarterly	Quarterly	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	Default Begin Date			1 January
	Default End Date			+50 Year(s)
Annually	Annually	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	Default Begin Date			1 January
	Default End Date			+50 Year(s)

- “Schedule Type”** – When the Recurring option is enabled this field is turned on by default and cannot be removed. It enables the donor to select the type of recurring schedule they would like, Annual, Monthly, Weekly, or Quarterly.
- “Enable to restrict available begin date options”** – This new feature opens up some further fields to allow you to restrict which Begin Date your donor can select. For example, some organizations choose to only allow their monthly donors to select the 1<sup>st</sup> or the 15<sup>th</sup> of the month, or just the 15<sup>th</sup>. This is an alternative to allowing every day of the month. We recommend you leave this OFF, however it can be useful where you have a specific need, like membership renewal dates for example.  
When turned ON, the Begin Date fields are replaced by one or two Date Option fields which you will then set. **\*\* You must Deselect the “Default Begin Date to Current Date” checkbox for the date options to be selectable. Otherwise, they will default to today’s date.**

Monthly	Monthly	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Date Option 1		1
	Date Option 2		15

- c. **“Choose which schedule type is selected by default”** – This new option allows you to decide which type is visible to the donor as the default first option in the picklist. Monthly recommended however that depends on which types you are offering on the form.

Choose which schedule type is selected by default	Monthly
---------------------------------------------------	---------

- d. **“Weekly”, “Monthly”, “Quarterly”, “Annually”** – These are the schedule type options your donor has access to. To remove any of them, simply uncheck the Visible checkbox. This will remove that type option from the form.

If you decide to offer that type, you can determine if today’s date will be used as the Begin Date (or commonly known as start date), which we talked about in point b above.

You also have the ability to **pre-define the End Date**. The default is +50 years into the future, however you can change this to reflect your business needs. You can also determine if years or cycles is a better fit. For example, you can select 12 months into the future if working a membership renewal campaign.

<b>Weekly</b>	Weekly	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
	Default Begin Date			Sunday	
	Default End Date			+50	Year(s)
<b>Monthly</b>	Monthly	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	Default Begin Date			1	
	Default End Date			+12	Month(s)
<b>Quarterly</b>	Quarterly	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
	Default Begin Date			1	January
	Default End Date			+50	Year(s)
<b>Annually</b>	Annually	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
	Default Begin Date			1	January
	Default End Date			+50	Year(s)

**\*\* Note regarding default begin and end dates:** Before these features were available directly on the iATS form builder, your organization may have defined them via our script or URL methods outlined in prior versions of this guide. **We don’t recommend using both options at the same time.** We recommend removing defaults via script and URL, and enabling these options instead. Of course, please do so on a test form first to ensure you can re-create the same functionality.

If you have any questions please reach out to iATS Customer Care at [iatscs@iatspayments.com](mailto:iatscs@iatspayments.com).

22. 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.

▲ Other Options

Field	Label	Visible	Required
Enable CAPTCHA	<input type="checkbox"/>	CAPTCHA Theme	red
Enable Email Notification	<input type="text" value="I would like to receive email."/>	<input checked="" type="checkbox"/>	Send email notification to donor after payment is processed successfully.
Email Type:	<input checked="" type="radio"/> For Single Approved Transaction <input type="radio"/> For Single Rejected Transaction <input type="radio"/> For Recurring Setup <input type="radio"/> For Recurring Approved Transaction <input type="radio"/> For Recurring Rejected Transaction		
From Name	<input type="text" value="OFF"/>		
From Email Address	<input type="text"/>		
BCC	<input type="text"/>		
Email Subject	<input type="text" value="We have received your payment."/>		
Email Body	<div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> <pre> &lt;div&gt;&lt;font size=2&gt;&lt;div&gt;[#FIRSTNAME#] [#LASTNAME#]&lt;/div&gt; &lt;br&gt;&lt;div&gt;Thank you very much, we have received your payment&lt;/div&gt;&lt;br&gt; &lt;table width=600&gt; &lt;tr&gt;&lt;td align=right&gt;Authorization Code&lt;/td&gt; &lt;td&gt;&lt;strong&gt;[#AUTHCODE#]&lt;/strong&gt;&lt;/td&gt; &lt;/tr&gt; &lt;tr&gt;&lt;td align=right&gt;Transaction Date&lt;/td&gt;&lt;td&gt;&lt;strong&gt;[#TRANSACTIONDATE#] &lt;/strong&gt;&lt;/td&gt;&lt;/tr&gt; &lt;tr&gt;&lt;td align=right&gt;Account Number&lt;/td&gt;&lt;td&gt;&lt;strong&gt;[#ACCOUNTNUMBER#] &lt;/strong&gt;&lt;/td&gt;&lt;/tr&gt; &lt;tr&gt;&lt;td align=right&gt;Amount&lt;/td&gt;&lt;td&gt;&lt;strong&gt;[#AMOUNT#]&lt;/strong&gt;&lt;/td&gt;&lt;/tr&gt; &lt;/table&gt;&lt;br&gt;                     </pre> </div> <p style="font-size: small;">Create a custom HTML email message to be sent to the donor when a single transaction is completed.</p> <div style="text-align: center; margin-bottom: 5px;"> <input checked="" type="button" value="Send Test Email"/> </div>		
Submit Button	<input type="text" value="Process"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Error Message	<input type="text" value="Please correct error and resubmit."/>		

23. Click on the Amount tab.

24. 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.

Amount Label	Amount	Enabled	Default	Quantity Label	Default Quantity	Maximum Quantity
▼ Amount 1 to 10						
Level 1 -	0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Quantity	1	
Level 2 -	0.00	<input type="checkbox"/>	<input type="checkbox"/>	Quantity	1	
Level 3 -	0.00	<input type="checkbox"/>	<input type="checkbox"/>	Quantity	1	
Level 4 -	0.00	<input type="checkbox"/>	<input type="checkbox"/>	Quantity	1	
Level 5 -	0.00	<input type="checkbox"/>	<input type="checkbox"/>	Quantity	1	
Level 6 -	0.00	<input type="checkbox"/>	<input type="checkbox"/>	Quantity	1	
Level 7 -	0.00	<input type="checkbox"/>	<input type="checkbox"/>	Quantity	1	
Level 8 -	0.00	<input type="checkbox"/>	<input type="checkbox"/>	Quantity	1	
Level 9 -	0.00	<input type="checkbox"/>	<input type="checkbox"/>	Quantity	1	
Level 10 -	0.00	<input type="checkbox"/>	<input type="checkbox"/>	Quantity	1	
▼ Amount 11 to 20						
Do not display decimals on Aura Form <input type="checkbox"/>						
Other Amount	Minimum	Message	Enabled	Default	Error Message	
Other	10.00	Minimum is	<input type="checkbox"/>	<input type="checkbox"/>	Input amount must be more than the minimum.	
Other	0	Minimum is	<input type="checkbox"/>	<input type="checkbox"/>	Input amount must be more than the minimum.	
Other	0	Minimum is	<input type="checkbox"/>	<input type="checkbox"/>	Input amount must be more than the minimum.	
Other	0	Minimum is	<input type="checkbox"/>	<input type="checkbox"/>	Input amount must be more than the minimum.	
Other	0	Minimum is	<input type="checkbox"/>	<input type="checkbox"/>	Input amount must be more than the minimum.	
Enable Multi-Selection <input type="checkbox"/> Enable Quantity <input type="checkbox"/> Enable Default <input checked="" type="checkbox"/>						
					<b>Invalid Amount Error Message</b> Please select at least one amount item.	

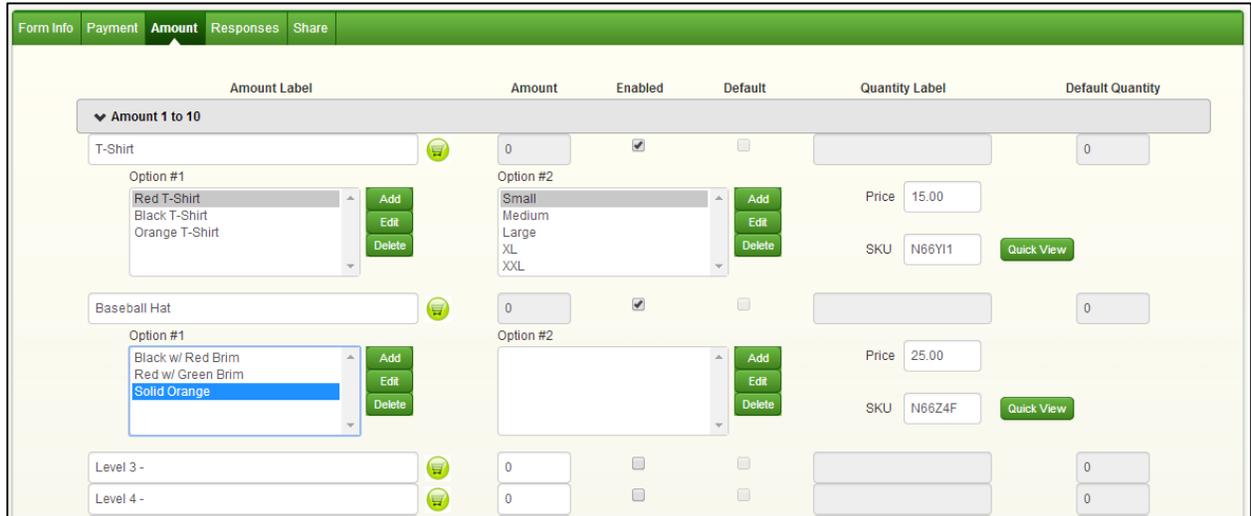
To enable the more detailed Shopping Cart feature, click the shopping cart icon beside one of the 20 payment levels. The Enable Multi-Selection and Enable Quantity options will automatically be selected. Within the Shopping Cart pop up options, you can add up to 20 Option 1 selections (such as Size),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

Amount Label	Amount	Enabled	Default	Quantity Label	Default Quantity
▼ Amount 1 to 10					
T-Shirt		<input checked="" type="checkbox"/>	<input type="checkbox"/>		0
Option #1					
Red T-Shirt	0.00				
Black T-Shirt	0.00				
Orange T-Shirt	0.00				
Baseball Hat		<input type="checkbox"/>	<input type="checkbox"/>		0
Level 3 -		<input type="checkbox"/>	<input type="checkbox"/>		0
Level 4 -		<input type="checkbox"/>	<input type="checkbox"/>		0

**Add Option** ✕

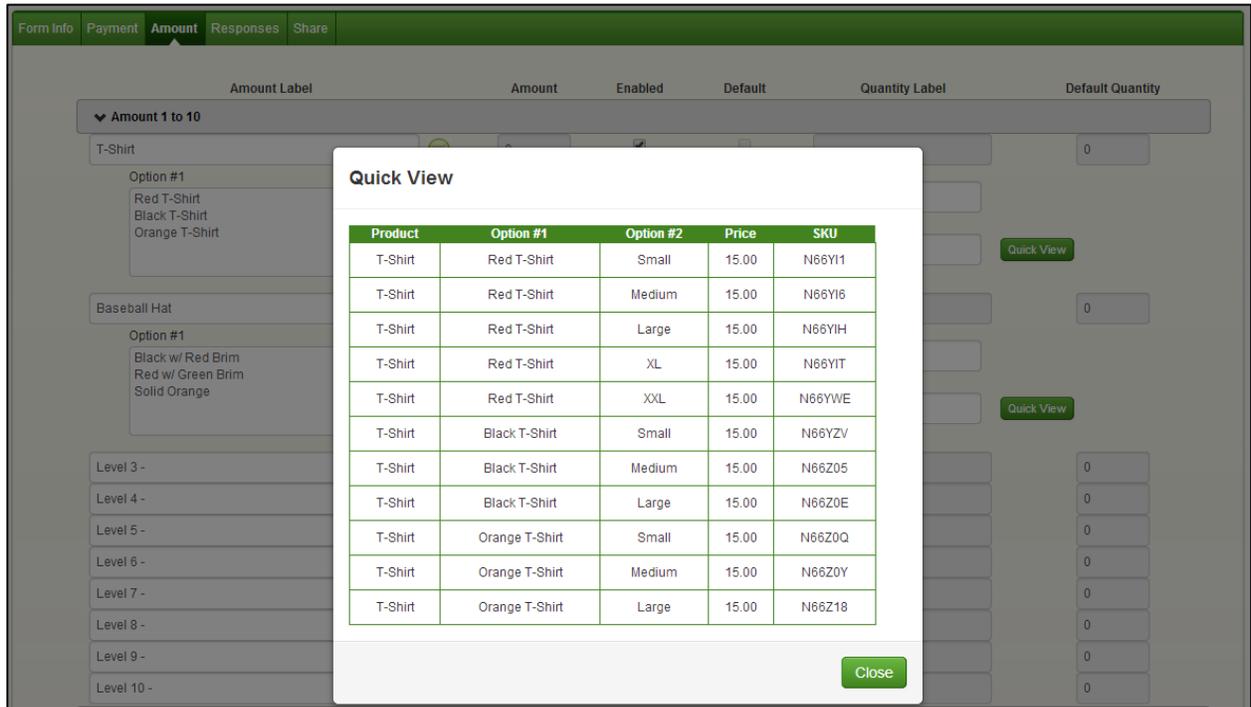
25. Once each option is added, you can add a price. A new unique SKU will automatically be created, however you can change the SKU if needed.



The screenshot shows the 'Amount' tab in the Aura interface. It displays a table with columns: Amount Label, Amount, Enabled, Default, Quantity Label, and Default Quantity. There are three main rows for product options:

- T-Shirt:** Amount 0, Enabled checked, Default unchecked, Quantity 0. Option #1 includes Red T-Shirt, Black T-Shirt, and Orange T-Shirt. Option #2 includes Small, Medium, Large, XL, and XXL. Price is 15.00, SKU is N66Y11.
- Baseball Hat:** Amount 0, Enabled checked, Default unchecked, Quantity 0. Option #1 includes Black w/ Red Brim, Red w/ Green Brim, and Solid Orange. Option #2 is empty. Price is 25.00, SKU is N66Z4F.
- Level 3 -:** Amount 0, Enabled unchecked, Default unchecked, Quantity 0.
- Level 4 -:** Amount 0, Enabled unchecked, Default unchecked, Quantity 0.

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



The screenshot shows the 'Quick View' modal window overlaid on the product configuration screen. The modal displays a table with the following data:

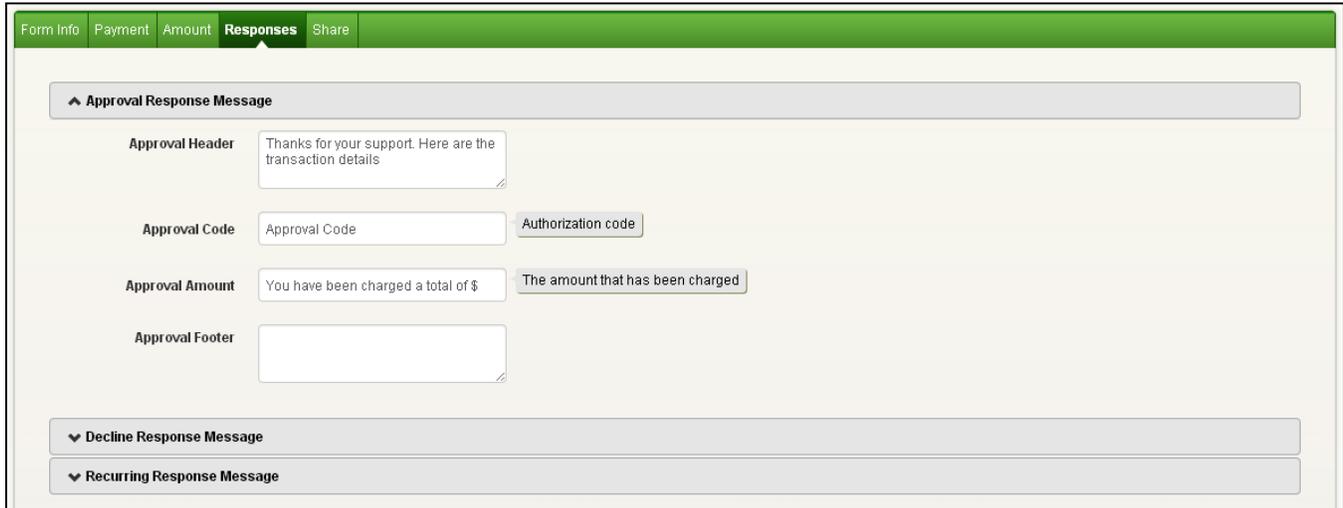
Product	Option #1	Option #2	Price	SKU
T-Shirt	Red T-Shirt	Small	15.00	N66Y11
T-Shirt	Red T-Shirt	Medium	15.00	N66Y16
T-Shirt	Red T-Shirt	Large	15.00	N66YIH
T-Shirt	Red T-Shirt	XL	15.00	N66YIT
T-Shirt	Red T-Shirt	XXL	15.00	N66YWE
T-Shirt	Black T-Shirt	Small	15.00	N66YZV
T-Shirt	Black T-Shirt	Medium	15.00	N66Z05
T-Shirt	Black T-Shirt	Large	15.00	N66Z0E
T-Shirt	Orange T-Shirt	Small	15.00	N66Z0Q
T-Shirt	Orange T-Shirt	Medium	15.00	N66Z0Y
T-Shirt	Orange T-Shirt	Large	15.00	N66Z18

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

27. Click on the Responses tab.

28. 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

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



The screenshot shows the 'Responses' tab selected in the navigation bar. Under the 'Approval Response Message' section, the following fields are visible:

- Approval Header:** A text area containing "Thanks for your support. Here are the transaction details".
- Approval Code:** A text area containing "Approval Code" and a button labeled "Authorization code".
- Approval Amount:** A text area containing "You have been charged a total of \$" and a button labeled "The amount that has been charged".
- Approval Footer:** An empty text area.

Below the 'Approval Response Message' section are two collapsed sections: "Decline Response Message" and "Recurring Response Message".

29. Click on the Share tab.

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



The screenshot shows the 'Share' tab selected in the navigation bar. The following options and fields are visible:

- Social Sharing:** A checkbox labeled "Enable the donor to share a link to this Aura form by email, Facebook or Twitter." which is currently unchecked.
- Link to Form:** A text area with a placeholder "Enter the link to the website page where the Aura form is located. This will allow donors to share a link to this page."
- Link Title:** A text area with a placeholder "Enter the title of the link to the Aura form."
- Email Message:** A text area with a placeholder "The default message that will be displayed when donors choose to share the form by email."
- Advanced Sharing:** A checkbox labeled "Enables donors to embed your Aura form into other websites." which is currently unchecked.

31. 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.

32. 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.

33. 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 `<p> ... </p>` block.*

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

## 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
<b>Select Form</b>	A drop down menu of all Aura forms that have been created. Up to ninety-nine Aura forms can be saved at one time.
<b>Name</b>	The name of the individual Aura form. There is a 59 character limit.
<b>Process Sub Code</b>	The two digit iATS sub-code following the four characters of the iATS Client Code. Ex: AURA <b>80</b> . This is the iATS Client code that Aura will use to process all transactions via this Aura form. <i>Important: Please contact iATS Customer Care at 1-888-955-5455, Option 1 or <a href="mailto:iatscs@iatspayments.com">iatscs@iatspayments.com</a> in order to add Aura transaction processing permission if not already enabled.</i>
<b>Script</b>	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 <code>&lt;body&gt;...&lt;/body&gt;</code> , <code>&lt;td&gt;...&lt;/td&gt;</code> , <code>&lt;p&gt;...&lt;/p&gt;</code> , etc. This value does not appear until you have first saved your Form. <i>Note: Additional <u>Aura</u> customizations are possible by editing the script. For more information, please see the <u>Aura</u> Customization section of this User Guide.</i>
<b>Parameters for Facebook App link</b>	This link displays options to integration the Aura form into a Canvas App on Facebook using <a href="#">Aura Connect</a> . For more information and our instructions, please <a href="#">click here</a> .
<b>Publish</b>	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.
<b>Event Title</b>	The title of the form that is visible to end users. This field can be customized using HTML. There is a 100-character limit.
<b>Description</b>	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.

## 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	
<b>Amount Title</b>	The title used to indicate the Amount section of the Aura form. There is a 39 character limit.	
<b>Payment Title</b>	The title used to indicate the Payment section of the Aura form. There is a 39 character limit.	
<b>Payment Note</b>	An optional field to add additional information below Payment Title. There is a 39 character limit.	
<b>Payment Currency Sign</b>	The currency symbol which will be displayed on the Amount section of the Aura form.	
<b>Label Position</b>	Defines the Payment section label positions. Can be set as Left, or changed to Top for a narrow Aura form.	
<b>Width</b>	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
<b>Pre-set Style sheet</b>	<p>You may select a pre-built style sheet to modify the look and feel of your Aura form if desired</p> <p>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.</p>	
<b>Enable Mobile Friendly CSS</b>	Select this option to make any of our "Modern" Pre-set Stylesheet's mobile friendly.	
<b>Custom Style Sheet</b>	<p>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://).</p> <p>Note: This step is optional, however if not used, the content of the form will display on a white <i>background</i>.</p> <p><b>Custom Stylesheet's are not viewable within the Aura Preview option.</b></p>	

<b>Script</b>	<p>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 &lt;body&gt;...&lt;/body&gt;, &lt;td&gt;...&lt;/td&gt;, &lt;p&gt;...&lt;/p&gt;, etc.</p> <p>This value does not appear until you have first saved your Form.</p> <p><i>Note: Additional <a href="#">Aura</a> customizations are possible by editing the script. For more information, please see the <a href="#">Aura</a> Customization section of this User Guide.</i></p>
<b>Post Back URL</b>	<p>A user specified URL to post Aura transaction information to <a href="#">Brickwork</a> or another CRM or page.</p> <p>Example - Enter a valid SalesforceForce.com secure URL (HTTPS) Site to post the information into your organization's Salesforce environment. Please see the <a href="#">Brickwork Installation Guide</a> for further details on how to create a Salesforce Site.</p> <p><i>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.</i></p>
<b>Redirect URL</b>	<p>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.</p> <p><b>Tips:</b></p> <p>When creating links, there are two types of links – <b>relative</b> and <b>absolute</b>. You can tell if a link is relative if the path is not a full website address. A full website address includes <a href="http://www">http://www</a>.</p> <p>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.</p>

## 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
<b>Label</b>	Fields that can be edited and will be displayed on the Aura form. Individual character limits are included in the field detail chart below. <b>All Label Fields have a 39 character limit unless specified.</b>
<b>Visible</b>	A checkmark box that controls the visibility of the field. If a field is not visible, it cannot be a required field.

<b>Required</b>	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.
<b>Message</b>	The message which will display if a required field is left blank. <b>All Message fields have a 39 character limit.</b>

<b>Horizontal Fields:</b>	<b>Description</b>
<b>Donor Details</b>	
<b>Title</b>	The label used to indicate the Salutation Field for the end user. Is a picklist field, however the donor can type text into the field if needed.
<b>First Name</b>	The label used to indicate the First Name Field for the end user. <b>Required recommended.</b> The end user can enter up to 39 characters.
<b>Last Name</b>	The label used to indicate the Last Name Field for the end user. <b>Required recommended.</b> The end user can enter up to 39 characters.
<b>Company Name</b>	The label used to indicate the Company Name Field for the end user.
<b>Address</b>	The label used to indicate the Address Field for the end user. The end user can enter up to 99 characters.
<b>City</b>	The label used to indicate the City Field for the end user. The end user can enter up to 39 characters.
<b>State/Province</b>	The label used to indicate the State or Province Field for the end user. <ul style="list-style-type: none"> <li>The state field will be a pre-selected list if the chosen country is Canada or US.</li> </ul> A text box will be displayed for other countries.
<b>Country</b>	The label used to indicate the Country Field for the end user.
<b>Zip Code</b>	The label used to indicate the Zip or Postal Code Field for the end user. The end user can enter up to 10 characters.
<b>Phone</b>	The label used to indicate the Phone Number Field for the end user. The end user can enter up to 39 digits.
<b>Mobile</b>	The label used to indicate the Mobile Number Field for the end user. The end user can enter up to 39 digits.
<b>Fax</b>	The label used to indicate the Fax Number Field for the end user. The end user can enter up to 39 digits.
<b>Email</b>	The label used to indicate the Email Field for the end user. <b>Required recommended.</b> The end user can enter up to 39 characters.
<b>Re-enter Email</b>	The label used to indicate the Second Entry Email Field for the end user. <b>Required recommended.</b> The end user can enter up to 39 characters.
<b>Comment</b>	The label used to indicate the Comment Field for the end user. The end user can enter up to 250 characters.
<b>Horizontal Fields:</b>	<b>Description</b>
<b>Custom Questions</b>	

<b>Item 1 to 15</b>	<p><b>The label used to indicate the Survey Questions that are visible to the end user.</b></p> <p><b>There is a 39-character limit for all Items, per question.</b></p> <p>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.</p>
<b>Enable Select</b>	<p>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.</p> <p>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 (<i>although we are looking at increasing this in a future release</i>).</p>
<b>More Info</b>	<p>An optional field for adding additional information for each Survey Question.</p> <ul style="list-style-type: none"> <li>Information entered into this field will display a question mark beside the question. The text will be displayed in a floating window when end user moves their mouse over the question mark.</li> </ul> <p>There is a 300 character limit.</p>
<b>Display Selected Items as:</b>	<p>The option to display question responses (when Enable Selection is being used) as either Radio Buttons or Pick List. Default is Radio.</p> <p>New to our June 2017 release is the ability to enable Multi-Selection. When used, the donor will be able to select more than one radio option at a time. The answers are separated by a comma within the Detailed Download Journal.</p>
<b>Horizontal Fields: Payment Details</b>	<b>Description</b>
<b>Credit Card</b>	<p>The label used to indicate the Credit Card method of payment field for the end user.</p> <ul style="list-style-type: none"> <li>When the checkmark box is checked, the additional required Credit Card Number, Expiry Date and CVV2 (security code) fields become visible.</li> <li>These field names can be edited, and have a 39-character limit.</li> </ul> <p>When the checkmark box is unchecked, the end user is unable to process a payment using a credit card number.</p>
<b>US Checking</b>	<p>The label used to indicate the ACH/EFT US\$ method of payment field for the end user.</p> <ul style="list-style-type: none"> <li>When the checkmark box is checked, the additional required Routing Number, Account Number and Re-enter Account Number fields become visible.</li> <li>These field names can be edited, and have a 39-character limit.</li> <li>The end user is required to enter 9 digits in the Routing Number field, and up to 17 digits in the Account number fields. They are also required to add their Account Type (Chequing or Savings).</li> <li>The Direct Debit Cancellation Policy and Recourse Statement links are displayed to the end user, which contains additional information regarding their ACH donation. This information is required, and cannot be edited.</li> </ul> <p>When the checkmark box is unchecked, the end user is unable to process a payment using their bank account details.</p>

<b>CDN Cheque</b>	<p>The label used to indicate the ACH/EFT CDN\$ method of payment field for the end user.</p> <ul style="list-style-type: none"> <li>When the checkmark box is checked, the additional required Transit Number, Bank Number, Account Number and Re-enter Account Number fields become visible. These field names can be edited, and have a 39-character limit.</li> <li>The end user is required to enter 5 digits in the Transit Number field, 3 digits in the Bank Number field, and up to 12 digits in the Account number fields. They are also required to add their Account Type (Chequing or Savings).</li> <li>The Direct Debit Cancellation Policy and Recourse Statement links are displayed to the end user, which contains additional information regarding their ACH donation. This information is required, and cannot be edited.</li> </ul> <p>When the checkmark box is unchecked, the end user is unable to process a payment using their bank account details.</p>
<b>Horizontal Fields: Payment Frequency</b>	<b>Description</b>
<b>Single Payment</b>	<p>The label used to indicate the Single Payment schedule field name for the end user.</p> <p>When the checkmark box is unchecked, the end user cannot process a single one-time transaction.</p>
<b>Recurring</b>	<p>The label used to indicate the Recurring Payment schedule field name for the end user.</p> <ul style="list-style-type: none"> <li>When the checkmark box is checked, the additional required Begin Date, End Date and Schedule Type fields become visible.</li> <li>When the checkmark box is unchecked, the end user is unable to process a payment using their bank account details.</li> </ul>
<b>Begin Date</b>	<p>The standard field used to collect the starting date for the recurring payments. No transactions will be automatically collected by iATS before this date.</p> <p>Alternatively, you can now default this date using the new default options below each schedule type if desired. See details below.</p>
<b>End Date</b>	<p>The standard field used to collect the ending date for the recurring payments. No transactions will be automatically collected by iATS after this date.</p> <p>Alternatively, you can now default this date using the new default options below each schedule type if desired. See details below.</p>
<b>Default Begin Date to Current Date (vertical checklist)</b>	<p>When selected the Schedule Types to the left will default to today's date on the donation form.</p> <p>If unchecked, you get access to the new "Default Begin Date" and "Default End Date" options described above.</p>
<b>Schedule Type</b>	<p>When the Recurring option is enabled this field is turned on by default and cannot be removed. It enables the donor to select the type of recurring schedule they would like, Annual, Monthly, Weekly, or Quarterly.</p> <p>You can remove donor access to the types as desired, for example you can only offer Monthly and Annually by unchecking the Quarterly and Weekly types.</p>

<b>Enable to restrict available begin date options</b>	<p>This new feature opens up some further fields to allow you to restrict which Begin Date your donor can select. For example, some organizations choose to only allow their monthly donors to select the 1st or the 15th of the month, or just the 15th. This is an alternative to allowing every day of the month. We recommend you leave this OFF, however it can be useful where you have a specific need, like membership renewal dates for example.</p> <p>When turned ON, the Begin Date fields are replaced by one or two Date Option fields which you will then set. ** You must Deselect the "Default Begin Date to Current Date" checkbox for the date options to be selectable. Otherwise, they will default to today's date.</p>
<b>Default Begin Date (Date Option 1 &amp; 2)</b>	<p>This option is used in conjunction with the above "Enable to restrict available begin date options" and allows you to pre-define a Begin Date for the donor. For example, for Weekly you can pre-define Wednesday as the Begin Date option for that upcoming week. For Monthly, you can predefine the 1<sup>st</sup> of the month so the donor can only setup a new recurring for the 1<sup>st</sup> of the month. This is helpful for membership's as an example.</p> <p>You can define up to two options for all types except Weekly which allows for one.</p>
<b>Default End Date</b>	<p>You can now define a new standard End Date. The default is 50 Years for all schedule types, however you can select another option appropriate to the type, in Weeks, Months, Years.</p> <p>For example, you can define the end date as 6 weeks if you are allowing students to pay for a school course over a six-week period. Or you can define an Annually recurring payment to a 2 year period.</p>
<b>Choose which schedule type is selected by default</b>	<p>This new option allows you to decide which schedule type is visible to the donor as the default first option in the picklist.</p>
<b>Weekly</b>	<p>If selected the donor will have access to the Weekly recurring type. If you decide to offer this type, you can determine if today's date will be used as the Begin Date (or commonly known as start date), which we talked about above. You also have the ability to pre-define the End Date. The default is +50 years into the future, however you can change this to reflect your business needs. You can also determine if years or cycles is a better fit. For example, you can select 12 months into the future if working a membership renewal campaign.</p>
<b>Monthly</b>	<p>If selected the donor will have access to the Monthly recurring type. If you decide to offer this type, you can determine if today's date will be used as the Begin Date (or commonly known as start date), which we talked about above. You also have the ability to pre-define the End Date. The default is +50 years into the future, however you can change this to reflect your business needs. You can also determine if years or cycles is a better fit. For example, you can select 12 months into the future if working a membership renewal campaign.</p>
<b>Quarterly</b>	<p>If selected the donor will have access to the Quarterly recurring type. If you decide to offer this type, you can determine if today's date will be used as the Begin Date (or commonly known as start date), which we talked about above. You also have the ability to pre-define the End Date. The default is +50 years into the future, however you can change this to reflect your business needs. You can also determine if years or cycles is a better fit. For example, you can select 12 months into the future if working a membership renewal campaign.</p>

<b>Annually</b>	<p>If selected the donor will have access to the Annually recurring type.</p> <p>If you decide to offer this type, you can determine if today's date will be used as the Begin Date (or commonly known as start date), which we talked about above. You also have the ability to pre-define the End Date. The default is +50 years into the future, however you can change this to reflect your business needs. You can also determine if years or cycles is a better fit. For example, you can select 12 months into the future if working a membership renewal campaign.</p>
<b>Horizontal Fields: Other Options</b>	
<b>Enable CAPTCHA</b>	<p>CAPTCHA is a security option that can be added to the Aura form.</p> <ul style="list-style-type: none"> <li>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.</li> </ul> <p>When the checkmark box is checked, a variety of color options are available which will be visible to the end user.</p> <p><i>Note: The paragraph option &lt;p&gt; can sometimes cause issues with the Captcha function, or cause surrounding fields to be formatted incorrectly. If this occurs, remove the &lt;p&gt;, or add a &lt;div&gt; tag between &lt;p&gt; and the &lt;script&gt; tags.</i></p>
<b>Enable Email Notification</b>	<p>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.</p> <ul style="list-style-type: none"> <li><u>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 <a href="#">DMARC policy changes</a>, we recommend that you do not use a From email address which uses @aol.com, @gmail.com, @hotmail.com, or @yahoo.com.</u></li> <li>When the checkmark box is checked, various email options become 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.</li> <li>The Organization's name and email address should be entered in the From Name and From Address fields.</li> <li>Multiple email addresses can be used in the BCC field, and should be separated by a semi-colon (;), or a comma (,).</li> <li>The Subject field can be used to customize the subject of the emails which will be sent to the end user.</li> <li>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.</li> <li>There is a <b>300-character limit</b> on Email Subject, From and To fields.</li> </ul>

	<ul style="list-style-type: none"><li>• There is a <b>10,000-character limit</b> on the email body. To find out the number of characters entered in the email body, you can use this character count online tool: <a href="http://www.javascriptkit.com/script/script2/charcount.shtml">http://www.javascriptkit.com/script/script2/charcount.shtml</a>.</li><li>• Send Schedule:<ul style="list-style-type: none"><li>○ Single Approved Transaction: Will be sent immediately following a successful CC transaction, or when a new ACH single transaction is submitted for processing.</li><li>○ Single Rejected Transaction: Will be sent immediately following a rejected Credit Card transaction. Will not be sent for any ACH Transactions.</li><li>○ 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.</li><li>○ 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.</li><li>○ Credit Card Recurring Setup: Will be sent when a new Credit Card recurring donation is scheduled.</li><li>○ ACH (Bank Debit) Recurring Setup: Will be sent when a new ACH recurring donation is scheduled.</li></ul></li></ul> <p>For more information regarding the Email customization, please see the Customize Aura Email section of this User Guide.</p> <p><i>Note: Emails containing &lt;img&gt; 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.</i></p>
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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
<b>Amount Label</b>	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 <b></b> tags are not supported in Amount Label fields. <b>All Amount Labels have a 39 character limit.</b>
<b>Shopping Cart Icon</b> 	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) <ul style="list-style-type: none"> <li>• Option #1 – <b>200 Character Limit</b></li> <li>• Option #2 – <b>200 Character Limit</b></li> <li>• Price</li> <li>• SKU – <b>40 Character limit.</b> 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.</li> <li>• Quick View Button – Allows the review all options, prices and SKU's.</li> </ul> <i>Note: The Shopping Cart feature is not currently available to our <u>Brickwork</u> users.</i> <i>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.</i>
<b>Amount</b>	The Dollar Amount which will be visible to the end user. Commas and currency symbols should not be included.
<b>Enabled</b>	A checkmark box which enables the Amount Label and Amount to be visible to the end user.
<b>Do not display decimals on Aura Form</b>	Checking this new option removes all decimals from the amount field displayed on the form. For example if 10.00 is entered into Amount field, it will display as 10 on the form.
<b>Other Amounts</b>	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. <ul style="list-style-type: none"> <li>• A description detailing the minimum amount can be added to the Message field. <b>There is a 39 character limit.</b></li> <li>• In addition, an Error Message can be customized should the end user enter an amount that is less than the minimum specified. <b>There is a 39 character limit.</b></li> </ul>
<b>Enable Multi-Selection, Enable Quantity, &amp; Maximum Quantity</b>	A checkmark box which enables the older version of our Shopping Cart feature. <ul style="list-style-type: none"> <li>• This feature enables the end user to select multiple items during, which will be totaled and processed as one transaction.</li> <li>• 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.</li> </ul>

	<ul style="list-style-type: none"> <li>You can also define a Maximum Quantity to cap the number of items a donor can select during their transaction.</li> </ul> <p><i>Note: The Shopping Cart feature is not currently available to our <u>Brickwork</u> users.</i>  <i>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.</i></p>
<b>Quantity Label</b>	The label used to describe the Quantity field when enabled. All Quantity Labels have a <b>39 character limit</b> .
<b>Default Quantity &amp; Default</b>	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.
<b>Error Message</b>	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. <b>There is a 39 character limit.</b>

## 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. <i>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.</i>
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.
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.

## 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.

Form Info	Payment	Amount	Responses	Share		
Amount Label      Amount      Enabled      Default      Quantity Label      Default Quantity						
▼ Amount 1 to 10						
T-Shirt		0	<input checked="" type="checkbox"/>	<input type="checkbox"/>		0
Option #1 Red Logo    Add Blue Logo   Edit Black Logo   Delete Orange Logo Purple Logo		Option #2 S    Add M    Edit L    Delete XL		Price	5.00	
		SKU	N6E9M7		Quick View	
Baseball Hat		0	<input checked="" type="checkbox"/>	<input type="checkbox"/>		0
Option #1 Red Top/Black Brim    Add Black Top/Red Brim    Edit Delete		Option #2 Add Edit Delete		Price	10.00	
		SKU	N6EPCW		Quick View	
Gala Ticket - Saturday Night		0	<input checked="" type="checkbox"/>	<input type="checkbox"/>		0
Option #1 Full Table    Add Half Table (4 Seats)    Edit Delete		Option #2 VIP Entry Add on    Add Regular Entry    Edit Delete		Price	1500.00	
		SKU	N6EP7F		Quick View	

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.

Quick View				
Product	Option #1	Option #2	Price	SKU
Gala Ticket - Saturday Night	Full Table	VIP Entry Add on	1500.00	N6EP7F
Gala Ticket - Saturday Night	Full Table	Regular Entry	1000.00	N6EP8B
Gala Ticket - Saturday Night	Half Table (4 Seats)	VIP Entry Add on	800.00	N6EP97
Gala Ticket - Saturday Night	Half Table (4 Seats)	Regular Entry	500.00	N6EP9L

[Close](#)

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
- Baseball Hat      Red Top/Black Brim      \$10.00
- Gala Ticket - Saturday Night      Full Table      VIP Entry Add on      \$1500.00

T-Shirt Red Logo S	+ 1 -	5.00	5.00	<a href="#">Remove</a>
<hr/>				
Baseball Hat Red Top/Black Brim	+ 1 -	10.00	10.00	<a href="#">Remove</a>
<hr/>				
Gala Ticket - Saturday Night Full Table VIP Entry Add on	+ 1 -	1500.00	1500.00	<a href="#">Remove</a>
<hr/>				
			Total: \$1515.00	

**Payment Information**

**Bold field is required input**

First Name     

Last Name     

Address     

City     

Country     

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.

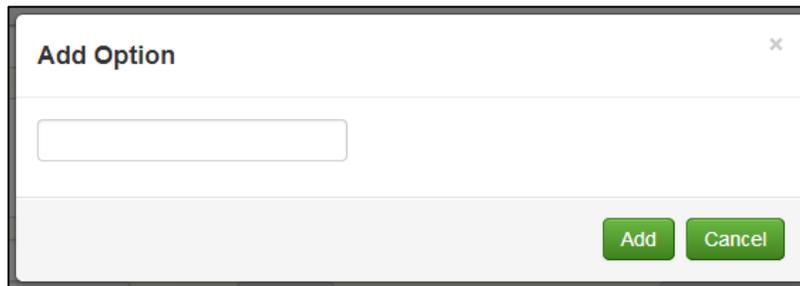
## 7.1 Shopping Cart Reporting

The iATS Portal reports at [www.iatspayments.com](http://www.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.

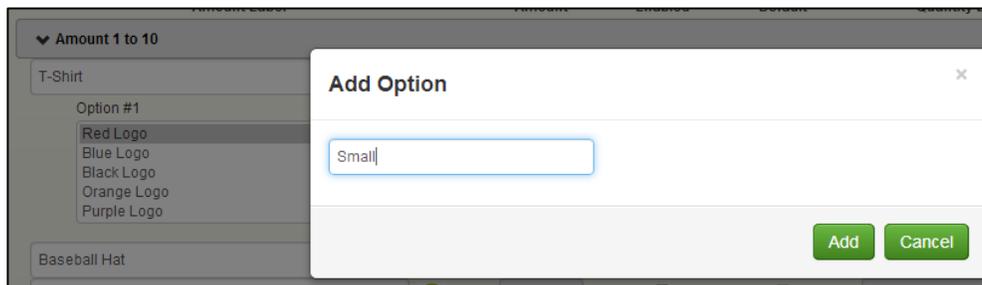
For more information regarding the iATS Portal Reporting features, please contact iATS Customer Care.

## 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.

Amount Label	Amount	Enabled	Default	Quantity Label	Default Quantity
Amount 1 to 10					
T-Shirt	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>		0
Option #1 Red Logo Blue Logo Black Logo Orange Logo Purple Logo	Option #2 S M L XL	<input type="checkbox"/> Add <input type="checkbox"/> Edit <input type="checkbox"/> Delete	<input type="checkbox"/> Add <input type="checkbox"/> Edit <input type="checkbox"/> Delete	Price 5.00 SKU N6E9M7	<input type="button" value="Quick View"/>

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>
<span>.....</span>
<div>.....</div>
```

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>
  <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 <p>...</p>. Google Chrome users may experience functionality issues when included.

## 9 Aura Customization

### 9.1 Adding and/or Hiding Static Defaulted Values

**\*\* Please note as of June 2017, we do not recommend using the below details for defaulting or pre-populating recurring details unless the new schedule options are not desired. Please review section 6.3 for more information on the changes we've made to defaulting and pre-populating the Aura Recurring Schedule details.**

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. 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&HideRecurring
EndDate=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
<b>FirstName</b>	First Name	
<b>LastName</b>	Last Name	
<b>Address</b>	Address	
<b>Country</b>	Country	<b>For Example:</b> <b>US</b> for United States <b>CA</b> for Canada <b>GB</b> for United Kingdom <i>Note: Any country can be set as default, and should use the Country name as listed within the Country drop down menu.</i>
<b>City</b>	City	
<b>State</b>	State	<i>Note: State name or state code can be used as default value if the Country is US/CA/UK. Both are acceptable.</i>  <i>For <b>US</b> example:</i> <i>AK or Alaska = both values will work</i> <i>For <b>CA</b> example:</i> <i>BC or British Columbia = both values will work</i>
<b>City</b>	City	
<b>ZipCode</b>	Zip Code	
<b>Fax</b>	Fax	
<b>Phone</b>	Phone	
<b>Phone2</b>	Mobile	
<b>EMail</b>	Email	Use variable as capital "E" and "M", and lower case "ail".
<b>ReEnterEmail</b>	Re-enter Email	
<b>Comment</b>	Comment	
<b>Item1, Item2, Item3, etc.</b>	Item's 1 through 6 (Survey Answer Text Box Fields)	Applies to the survey answer <b>text</b> 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.
<b>BeginDate **</b>	Beginning Date	Date must be entered in format: <b>mm/dd/yyyy</b> <b>**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.</b>

<b>EndDate</b>	Ending Date	Date must be entered in format: <b>mm/dd/yyyy</b> 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.
<b>RedirectTime</b>	Sets value for the length of time Redirect page displays (In milliseconds)	<b>2000</b> (2 seconds) by default. Accepted range is from <b>100</b> (0.1 seconds) to <b>15000</b> (15 seconds).
<b>TotalAmount</b>	Sets the total Amount of the end user's payment.	The default TotalAmount will only be displayed when HideAmountInfo is set true.
<b>TotalDescription</b>	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
<b>HideRecurringEndDate</b>	Hides Recurring End Date visibility	Use true to hide the recurring End Date field.
<b>HideAmountInfo</b>	Hides the Amount section. End user cannot select an amount.	Use true to hide Amount section of the Aura form.
<b>HideWeekly</b>	Hide weekly recurring schedule type.	Use true to hide the weekly recurring.
<b>HideMonthly</b>	Hide monthly recurring schedule type.	Use true to hide the monthly recurring.
<b>HideQuarterly</b>	Hide quarterly recurring schedule type.	Use true to hide the quarterly recurring.
<b>HideAnnually</b>	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**:  
<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](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
<b>Title</b>	Title	Values accepted: <b>Mr.</b> = Mister <b>Mrs.</b> = Missus <b>Ms.</b> = Miss <b>Dr.</b> = Doctor <b>Prof.</b> = Professor <b>Rev.</b> = Reverend <b>Other</b> = Other  <i>Note: These values are case sensitive and it should be added exactly as indicated above.</i>
<b>FirstName</b>	First Name	
<b>LastName</b>	Last Name	
<b>Address</b>	Address	
<b>City</b>	City	
<b>State</b>	State	<i>Note: State name or state code can be used as default value if the Country is US/CA/UK. Both are acceptable.</i> For <b>US</b> example: AK or Alaska = both values will work For <b>CA</b> example: BC or British Columbia = both values will work
<b>Country</b>	Country	Values accepted: <b>US</b> for United States <b>CA</b> for Canada <b>GB</b> for United Kingdom <i>Note: Any country can be set as default, and should use the Country code (not the Country name).</i>

		For example: <b>FR</b> for France <b>DE</b> for Germany
<b>ZipCode</b>	Zip Code	
<b>Phone</b>	Phone	
<b>Phone2</b>	Mobile	
<b>Fax</b>	Fax	
<b>EMail</b>	Email	Use variable as capital "E" and "M", and lower case "ail".
<b>ReEnterEmail</b>	Re-enter Email	
<b>Comment</b>	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.

### 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
[#ITEMLABEL1#] to [#ITEMLABEL15#]	Custom Question asked on the donation form. There are 15 of these fields that can be included.
[#ITEM1#] to [#ITEM15#]	Custom Question Response given by the donor. There are 15 of these fields that can be included.
[#ACCOUNTNUMBER#]	Portion of Bank Account or Credit Card Number
[#ACCOUNTTYPE#]	Account Type (Checking/Saving)
[#AGENCYNAME#]	Organization Name
[#CUSTOMERCODE#]	Recurring Donation Customer Code Token
[#AUTHCODE#]	Authorization/Rejection Code for Transaction
[#AMOUNT#]	Total Dollar Amount

[#TRANSACTIONDATE#]	Date of Transaction
[#TRANSACTIONID#]	The iATS Transaction ID that is assigned to each transaction. This is a unique value.
[#BEGINDATE#]	The Begin Date selected by the donor for Recurring donations.
[#ENDDATE#]	The End Date selected by the donor for Recurring donations.
[#SCHEDULEMONTH#]	The Schedule Month selected by the donor for Recurring donations that use the Monthly type.
[#SCHEDULEDAY#]	The Schedule Day selected by the donor for Recurring donations.
[#SCHEDULETYPE#]	The Schedule Type selected by the donor for Recurring donations.
[#SHOPPINGCARTTABLE#]	Details when using the full Shopping Cart option. Includes: Product Name, Option1, Option2, SKU, Quantity, Price, Quantity Price
[#AMOUNTITEM1#] to [#AMOUNTITEM20#]	Amount Label. There are 20 amount levels that can be included.

## 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](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 1-888-955-5455, or [iatscs@iatspayments.com](mailto:iatscs@iatspayments.com).

## 9.5 Google Analytics Integration

[Google Analytics](#) is a freemium style analytics service offered by Google that tracks and reports website traffic.

To support the ability for our clients to call their own Google Analytics code when the Aura “Process” button is clicked, we added some event hooks that clients can implement within their own JavaScript in order to call your own google analytics code.

### Sample:

```
window.addEventListener('IATS_TRANSACTIONSUCCESS', function(e){
  TrackAnalytics("single transaction", e.data.transID, e.data.amount);
});
window.addEventListener('IATS_TRANSACTIONFAILURE', function(e){
  TrackFailure("single transaction");
});
window.addEventListener('IATS_RECURRINGTRANSACTIONSUCCESS', function(e){
  TrackAnalytics("recurring transaction", e.data.transID, e.data.amount);
});
window.addEventListener(' IATS_RECURRINGTRANSACTIONFAILURE', function(e){
  TrackFailure("recurring transaction");
});
```

### New Hooks:

- IATS\_TRANSACTIONSUCCESS
- IATS\_TRANSACTIONFAILURE
- IATS\_RECURRINGTRANSACTIONSUCCESS
- IATS\_RECURRINGTRANSACTIONFAILURE

These hooks are thrown out at various points in the AURA JavaScript, points which are inferable by reading the event name of the Aura form.

Everything inside the curved brackets {} can be replaced by the developer’s own code. For example, you could write the following:

```
window.addEventListener('IATS_TRANSACTIONSUCCESS', function(e){

  console.log(e.data);

  alert("IATS_TRANSACTIONSUCCESS");

});
```

in order to see information on the event that you just “hooked” onto within the form/processing.

## 9.6 Configurable Donor Redirect URL for Items 1-15

As of June 2017, you can now determine the landing page of your donor's dependent upon the answers they provide in your custom questions, Items 1-15.

For example, if you have a question such as "Please select a fund to contribute to:", with responses the donor can choose from such as:

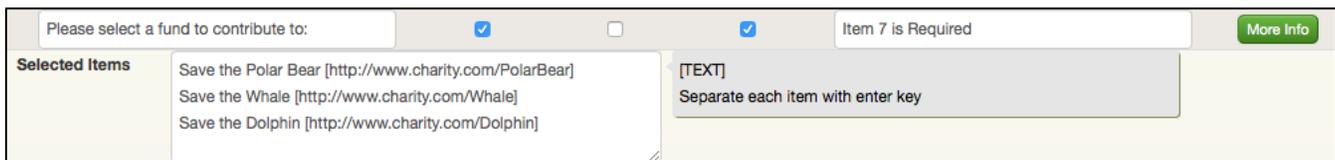
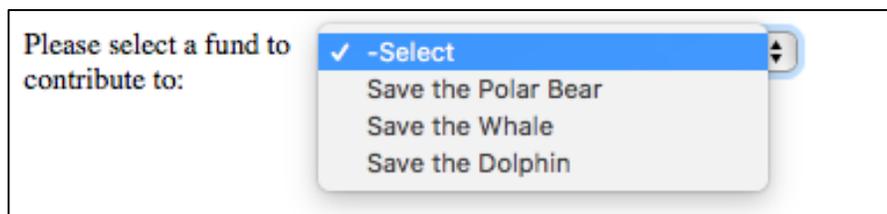
- Save the Polar Bear
- Save the Whale
- Save the Dolphin

you can direct the donor to a page you've designed to perhaps thank them for their gift, and give them more detailed information on the animal they've selected.

To accomplish this, follow the below instructions.

*Note, we don't recommend using this option in conjunction with the "Multi-Select" picklist options for answers as there may be different URL's in the options they choose.*

1. With Aura setup, click on the "Payment" Tab for the form you'd like to add a configurable URL.
2. For any question in Item's 1- 15, ensure the "Enable Select" checkbox is checked.
3. Type the options you'd like to display to the donor. Be sure to put one option per line. Use Enter to move down to enter another option.
4. At the end of each option, type an opening square bracket like this: [ , followed by your URL and a closing square bracket like this: ] . The URL must include an http:// or https:// from your website or the redirect will not work and will be visible on the form. When the http:// details are included, the URL will be hidden from the donor on the Aura form.

5. When the donor makes a successful donation they will be directed to your desired page.

## 10FAQ'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 1.2). The TLS protocol is the 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 `<p>` or `</p>` has not been added to the Aura script after inserted into your webpage. Either remove the `<p>` and `</p>`, or add a `<div>` tag between the `<p>` 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.

**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.

Field	Label	Visible	Required
Enable CAPTCHA	<input type="checkbox"/>	CAPTCHA Theme	red
Enable Email Notification	<input type="text" value="I would like to receive email."/>	<input checked="" type="checkbox"/>	<small>Send email notification to donor after payment is processed successfully.</small>
Email Type:	<input type="checkbox"/> For Single Approved Transaction <input type="checkbox"/> For Single Rejected Transaction <input type="checkbox"/> For Recurring Setup <input type="checkbox"/> For Recurring Approved Transaction <input type="checkbox"/> For Recurring Rejected Transaction		

- 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.

**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.