## PayPal Discussion Fellesraad Annual Meeting 2025

Paypal has been a peer-to-peer payment platform for 25 years. Over the last decade, it has partnered with almost every major financial institution, including Barclays, American Express, Visa, Discover, and Bank of America. It has 426 million consumer and merchant accounts and over 25 billion transactions as of 2023. These stats alone make it a frontrunner when considering an online payment platform. Paypal is so generally trusted that there is a 74% increase in the likelihood of users completing an online purchase when PayPal is present at checkout. PayPal's 180-day buyer protection policy, ability to pay in multiple ways (bank transfer, credit, or debit card), and reputation likely account for this increase.

But why do we need an online payment platform at all? According to AARP, nearly two-thirds of the U.S. adult population uses a peer-to-peer banking platform. 57% of Americans have not written a check in the last 30 days. Only one in twenty non-cash purchases is made with checks. And of those check users remaining, the majority are over age 65. Many young people are not even given an option to purchase checks when opening their first bank account.

Additionally, electronic payments are widely considered safer than checks. In 2023, the USPS issued a warning to the public advising against sending checks through the mail due to an increase in mail theft and fraud. Check fraud accounts for almost half of bank deposit fraud losses annually.

If Lags are looking for members under age 65, we need to accommodate those consumers' purchasing habits. PayPal facilitates this in a way that is both easy and low-risk for both the merchant and the consumer.

You can use PayPal for payments by adding buttons or links to your website OR by just using the Invoicing or Request Money Features and email.

## Good To Know

- Paypal can be linked to almost any online storefront, registration platform, or form builder.
- There are several ways to get paid using only the PayPal platform and tools.
- Paypal fees are 2.89% of the transaction amount plus \$ 0.49.
- Paypal nonprofit fees are 1.99% of the transaction amount plus \$ 0.49.
- Paypal business accounts allow for multiple users and login credentials.
- Paypal fees are competitive with other peer-to-peer payment platforms.

## Set up a PayPal Business Account

#### You Will Need

- Designated account owner (with verification of identity, see below)
- EIN of the Lag (optional, see below)
- Banking Information of the Lag and account access for verification
- An Email account
- Password
- Proof of tax-exempt status (can be provided later, see below)

#### Account Owner

The account owner will provide their personal information, name, address, phone number, date of birth, and the last four digits of their Social Security number. Proof of identity will need to be provided via a photo or scanned copy of a valid photo ID. If the Lag does not have an EIN, the account holder will be listed as a sole proprietor. I suggest the webmaster or treasurer for this role. Once the account is set up, additional users can be added to the business account as needed.

#### Email and password

If you have a business email account, you can use this. If not, setting one up might be helpful. The email address will be used for both logging in and for all transaction information. PayPal will send you an email about each transaction, so email traffic can get heavy at times. Using a personal email address also works fine. The password can be saved locally by your device, but two-factor authentication is common if new devices are used or when new links are set up. Two-factor authentication is often completed through the account holder's phone number or email. However, sometimes it requires the last four digits of the account holder's Social Security number to authenticate, even if an EIN is on file.

#### Redundancy

After the business account is set up, I recommend adding additional users with the necessary permissions to the account. The webmaster, vice president, president, and treasurer are all options. Having at least one other person with permission to make bank transfers, access customer data, and make user changes to the account is essential to smooth transitions when leadership changes happen by vote or by circumstance. If there is always someone with access to changing the account holder information, then the last four digits of the SSN can be worked around if necessary. Losing access to the account might mean having to start over from scratch. (Accounts->Account Access->Manage Users)

#### Fees and Tax Exempt Status

When setting up the account, if you are a 501(c)(3) organization, select "Non-Profit Organization" as the business type. You will need to provide the IRS letter showing this status to PayPal via a photo or a scanned copy of the document. You do not have to do this at setup; PayPal will email you to do this later. Regular transaction fees are 2.89% of the transaction amount plus \$ 0.49. With nonprofit status, fees are 1.99% of the transaction amount plus \$ 0.49. This is comparable to other services, such as Stripe and Square, but with more favorable international fees. Merchants often increase the prices of their products to cover these fees, either on a per-transaction basis or on a global scale. For Telelaget, the increased engagement has largely offset the fees.

#### Directions

 From PayPal.com, click Sign Up and then choose Business Account and click Get Started

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	<ul> <li>No credit checks required, just provide</li> </ul>	Enter between 8 to 20 characters.     An upper and lowercase letter.	
	some business details and link your bank to accept payments.	A number or a symbol.	
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- Fill in the account owner's name, email, password, and phone number. Click Agree and Create Account
- Confirm your email with a code. Paypal will use the email you provided to send you a security code. Navigate to your email, find the code, navigate back to PayPal, enter the code here, and click submit.
- Click Let's Go
- Choose either Sole Proprietor or Nonprofit

 Enter account holder personal information (the name and address here needs to match the account holder's personal tax information) and click Next

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 Enter business information including name, type of business, web address etc. (the business address can be whatever address your lag uses for correspondence or the treasurer's address) and click Next

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	Street address

- Click Link a Bank
- Scroll to the bottom and click Link Bank Manually.
- Enter banking information, including account type, routing, and account number. Click *Authorize and Link*
- Paypal will deposit two small amounts into your bank account. You will need to access your bank account to find those deposit amounts, navigate back to PayPal, enter the amounts in the form, and click *Confirm*.

## Getting Paid via PayPal

Create a payment link or button

Use for: Email, Facebook or Website

Directions

- From the top menu, go to Pay and Get Paid-> Create Payment Links
- Choose Payment Link & QR Code
- Fill in the Item Name and Description
- Set a Price
  - \*The gray pane on the left shows you the preview
- Optionally add Photos

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Next

- Click on Checkout (underneath Build Your Pay Links and Buttons)
- Choose whether or not to collect the customer's shipping address
- Choose whether or not you will add automated shipping fees
- Choose whether or not you will add taxes

Next

• Click on Confirmation (underneath Build Your Pay Links and Buttons)

- Turn on Auto Return with the button
- Add your web address to the field

#### Next

• Click the *Build It* button on the upper right-hand side. This will bring you to the payment link. This hyperlink is specific to this product and can be shared via email or added to your website.

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Under the item title, you can choose *QR Code*, *Stacked Buttons*, or *Single Button*. If you choose a button option, the HTML is provided for you. It is specific to this product.

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Examples:

## Request Money

Use for: Email or snail mail orders.

- From the top menu, go to Pay and Get Paid, and then Request Money
- Type in the Email Address and click Next
- Add the Dollar Amount
- Add a Description
- Click Request Now

## Send an Invoice

Use for: Email or snail mail orders

- From the top menu, go to Pay and Get Paid, and then Create an Invoice
- Type in the customer's name or email address (customer info will be saved by PayPal for future use)
- Click Create New Item and list the item name, price, and description
- Turn off Ship Items To unless required
- From here, you can optionally add reference numbers, notes for the buyer, and notes for yourself
- On the bottom left, Upload Files can be used to attach order forms.
- On the right-hand side of the screen, you can toggle between the *Invoice Summary* and a *Preview*.
- Under *Invoice Summary*, customize invoice number, date, due date, and additional discounts or fees.
- Click Send, and a payment invoice will be emailed to the customer.

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## **Registration Forms with Payment Options**

#### Jotforms

https://www.jotform.com

Easy-to-make registration forms that will simply link to your PayPal account. Form responses can be automated and fed to a spreadsheet, but this requires an additional step/integration.

\$39.00/mo for 100 payment-linked form submissions per month. Free for 10 payment-linked form submissions per month.

#### Wufoo

https://www.wufoo.com

Similar to Jot Forms, payment fields are easily linked to PayPal. Form responses can be automated and fed to a spreadsheet, but this requires an additional step/template.

\$29.08/month for payment-linked forms. The free option does not include payment-linked forms.

#### Google Forms+Payable Forms Add On

https://www.payableapps.com/start

Google Forms can be customized, but they aren't as user-friendly. Drag and drop building is limited, templates are limited, and features are limited. However, it is sufficient for event registration. The Payable Add On easily makes any Google form payment-linked. When launched, the add-on will walk you through the payment linking process step by step. It will sync with your form's theme and title and automatically send all your form responses to a Google spreadsheet. Email notifications are sent with each transaction; if the customer does not complete checkout, it automatically sends them an email and a link.

Google Forms is Free. Payable Forms requires no subscription, but charges per transaction. For transactions under \$3.00 - No fee For transactions \$3.01-\$50.00- \$0.30 fixed fee For transactions over \$50.00 - 0.6% of the transaction total

Step by Step video tutorial for Payable Forms: https://support.payableapps.com/en/articles/9287332-getting-started-with-payable-forms

# How to Use Google Forms for Registration? [6 Easy Steps Guide]

How-to, Google Forms for Registration / By Nikita Chandola

There are plenty of ways to make good use of Google Forms. The most obvious ones are surveys, tests, and quizzes, but apart from that, you can also use forms for creating event registrations or such cases. This post will tell you how to use <u>Google Forms for registration</u> for webinars or any events.

You can create Google forms for registration for various different reasons like registering your attendees for an event or understanding your attendees' preferences, etc.

Google Forms is a great online form builder for various things and using Google Forms for registration is one of them. We will discuss the benefits of online registration and the process to create one in 6 easy steps guide, so let's get into the article.

## Steps to Use Google Forms for Registration

Here are the steps to follow if you want to use Google Forms for registrations;

## Step 1: Create the Form

To create Google Forms for registration you must navigate to Google Forms site, or go through the G-Drive

> Google Forms and select the event registration form template.

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It will open up a form with pre-made questions and a header image that you can modify easily. I will explain that in further steps.

Looking for extensive customization of the timer in Google Forms? Read, <u>ExtendedForms Unveils:</u> <u>Customized Timer Themes</u>.

## **Step 2: Add Online Registration Questions**

So, the next step is to add questions to a registration form. If you select the online registration Google Forms template, you will see a few pre-added questions. If you find them appropriate then that's perfect, you can add more.

Enter an appropriate title and description that's relevant to your event. However, here are some key questions to consider if you want to collect the information for webinars or any event.

#### Question Types for Event Registration Form:

- First & Last Name
- Contact Details Mobile No. & Email-id
- Name of their organization
- Social media handles

- Any food allergies or dietary restrictions?
- Session and event preferences
- Which event will you be attending/participating in? (if there is more than one event happening)

For questions, click on the specific question tab and it will expand & give you options to modify. Select the question and make your changes.



To add a new question click on "Add a new question" ( $\oplus$  icon) on the floating menu next to the question tab. Google Forms provides various question formats that you can view in the dropdown in the question tab.

Google automatically selects the answer type based on your question but you can change it from the dropdown menu.

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Further, you can duplicate the questions, trash them, and even make them required. Apart from that, you can 'respond to and validate' your short/long paragraph questions.

You can create answer validation for numerical, text, regular expression, or length and add custom error text that your respondents will see if they don't write answers based on a certain category. Click on the '**:**' at the bottom and select 'Response Validation.'

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Once you are done adding questions, it's time to tweak the settings of Google Forms for registration. Go to the 'Settings' tab, where you can configure all the form settings. For example, under the 'Responses' option, enable the 'collect email addresses' option because they are needed for further communication.

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Then, you can enable the 'limit to 1 response' option as well. Under the 'Presentation' option you can edit the 'confirmation message which will be seen after submitting the form. You can also make all your questions default by enabling the same option. Questions Responses

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Show link to submit another response	<b>_</b> _
View results summary	
Share results summary with respondents. Important details	
DESTDICTIONS	

## **Step 4: Customize Forms**

This is an optional step, Google Forms for registration template is quite well-built in itself. However, if you want to make changes to the form like header image, and theme color, then you can do so under the <u>'Customize Forms'</u> option.

Click on the Customise Theme at the top bar in the color palette icon. A theme dialogue box will appear on the right side. From there, you can choose the text style and font size for the header, questions, and text (description), there are limited fonts to choose from.

<b>Event Registration</b>		☆
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Furthermore, you can choose your own header image, either selecting it from the present theme options or uploading it from your device. Then, add a custom theme color and background color effect.

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Further, if you have a team for an event/webinar and want to share the form responses with them you can add them as a collaborator.

To do so, go to the 'More' option at the top right corner with this icon – ':' and click on '<u>Add Collaborators</u>.' Add people with Google accounts and then they will also be able to access your form.



#### Step 5: Preview & Send Forms

Once all the above steps are done, it's time for you to preview your form to see how it's looking. Just click on the 'eye' icon at the top bar to preview the form. Then to share the form, click on the 'Send' button.

If you are using your business Google account, then you'll get an option of – automatically collecting respondent's company email addresses, you can enable that option if you want to default collect emailids.

You can send forms, either through invites, links, embedded HTML (add it to your webpage), or social platforms.

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Also, once your deadline is over you can also stop accepting responses, in the 'Responses' tab you will see an option of 'accepting responses' just disable it, Google Forms will then not accept any further responses.

z responses		Link to Sheets
		Accepting responses
Summary	Question	Individual

## Step 6: Collect & Analyze Form Responses in Spreadsheet

The last step here is that you can connect <u>Google Forms with Google Sheets</u> so that you can <u>collect data</u> in an Excel sheet and you can share that sheet with anyone. It will help you to analyze the attendees further and based on that data, you can work on making your registration process easier.

- So, for that, go to the 'Responses' tab in Google Forms,
- Click on the spreadsheet icon and a new sheet will be made



- You can also select the response destination, click on three dots,
- Navigate to the 'select response destination,' create a new sheet, or add it to any previous ones.

