

## Using Stripe in Nanacast

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#### 1 - Adding/Managing Stripe accounts:

From the main Nanacast menu, click Manage >> Stripe Account

Click "Add New Account". Here you can supply your Secret Key and Publishable Key for both Live and Test mode.

You can find these from your Stripe account under Your Account > Account Settings, then click on the **API Keys** tab.

When you supply both Test and Live keys in your Nanacast account, this allows you switch from Test Mode to Live Mode at will for doing test transactions in Nanacast.

If you add multiple Stripe accounts under Manage >> Stripe Account, you must set one of the accounts as your primary Stripe account. The primary account is the one that will be used for any offers set to use Stripe as the payment method. You can make an account the primary account by clicking the Star icon in the top right corner of the account listing.

**Editing an existing Stripe account:** Simply update your existing account details and click the "Update" button at the top right of the Manage >> Stripe Account page. All existing accounts on the page will be updated.

**Note:** It is assumed (and recommended) that you will want to test a transaction after adding/updating your Stripe credentials, so the system will default the mode to 'Test' when you click the 'Update' button.

**Removing an existing Stripe account:** Click the X icon in the top right corner of the account listing. Confirm the deletion.

**Changing Modes:** When an account is set in Test Mode, the Test Mode icon in the upper left corner of the Manage >> Stripe Account page will be green. In Test Mode, Nanacast will use the Test keys you've provided to make test transactions for any offers using Stripe as the payment method.

To change to Live Mode, click the Live Mode icon in the upper left corner of the Manage >> Stripe Account page. The icon will be green. In Live Mode, Nanacast will use the Live keys you've provided to make live transactions for any offers using Stripe as the payment method.

You can switch between Live and Test mode at any time to test transactions as needed without using live credit card data or making an actual charge. (See the notes on Refunds below for refunding test transactions.)

**Note:** It is NOT necessary to click the 'Update' button after changing modes, you can change one mode to another on the fly and the mode change will take effect immediately.

## **2 - Set Stripe as the payment method in your offer**

Create a new or edit an existing offer.

From the Edit Pricing & Delivery step/page of your offer, in the "Payment Processor Settings" section, set the "Default Ordering Method" field to "Stripe"

## **3 - Get code for embedded form for your offer:**

From the overview menu of your offer, click "Create Button". (Alternately, from the main menu, click Create >> Forms, Buttons & Links, and then select your offer)

Copy the embedded form code and paste into your sales page. Text Links and Plain Checkout URL are also supported.

Stripe integration uses the Nanacast secure checkout form for checkout, so the same customization options for the checkout form are available.

## **Stripe and Upsell/Downsell/OTOs:**

One-click Upsells are supported with Stripe with the following limitations:

- » The original offer must be a Stripe offer in order for subsequent Stripe offers in the sales funnel to be true one-click

- » The original offer can also be a Free offer, but the first paid offer with Stripe as the payment method will of course use the secure checkout form to collect credit card data. Any subsequent paid Stripe offers in the upsell/downsell sales funnel will be one-click.

- » Having offers with mixed payment methods in an upsell/downsell sales funnel may work but is not recommended, and will not be true one-click.

## **Using multiple payment methods in the same offer with Stripe:**

Not all combinations of payment options available in Nanacast can be used in the same offer with Stripe. For example, PayPal can be an additional payment option, but Credit Card (via Merchant Account) cannot. Any incompatible payment methods will be hidden when Stripe is selected as the payment method, and vice versa.

As always, when multiple payment methods are available, you must use the optional Nanacast-hosted sales page or the Nanacast embedded form on a self-hosted page (recommended). Use of a text link or plain checkout URL is not supported for an offer with multiple payment methods. When multiple payment methods are selected, the customer can select the payment method via a drop-down selection on the embedded form before advancing to the checkout process.

The Payment drop-down option on the form for Stripe will appear as "Credit Card".

## **Refunds:**

Stripe refunds can be processed via the refund options on the Transactions page (from the main menu under Sales & Transactions >> Transactions) with the standard refund options. If a test Stripe transaction was made while in Test Mode, the refund should be made while in Test Mode also. Live

Stripe transactions made while in Live Mode should be refunded while in Live Mode also.

### **Free Trials for Paid Subscriptions/Recurring Offers:**

Free Trial periods for paid subscriptions or recurring offers are not supported with Stripe as the Payment method. There must be an initial charge on initial registration/checkout in order to capture payment data for the recurring payments.