

Anonymising 7th Tradition PayPal Donations [long guide]

A guide for groups for setting up a new email account and new PayPal account in a group name:

This is a guide to treasurers of CoDA groups in the UK wishing to set up a PayPal account in their group name. This serves to help protect anonymity and helps to comply with the General Data Protection Regulation (GDPR). The new email address (used for PayPal 7th Tradition fund) could also be used by GSRs of groups which could be passed on to the next GSR in service.

Steps to set up a PayPal account using a new email account:

1. **1st Step is to set up a group email account (same email as your group PayPal email [IMPORTANT: with different password]):**
2. If your group has a PayPal account in a personal name using a personal email address, you will want to close the account so that no future 7th Tradition donations are made into it. Do not close the account until you have opened a new PayPal account in your group's name and have informed members of the PayPal link.
3. Treasurer to create a new email account which will become the PayPal email address. (eg: gmail), eg: Oxford.Tuesday630@gmail.com
4. Decide on a name that isn't your personal name, but which best describes your group. The reason for this is so that the email account can be passed on to the next treasurer with each new rotation of service.
5. Instead of using your first and last name, use the group names.
6. Choose a first name: OxfordTuesday
7. Choose a surname: SixThirty
8. Choose a username: Oxford.Tuesday630
9. Choose a password: Oxford630 (IMPORTANT different from the PayPal password)
10. Provide your own telephone number and date of birth.

A recovery email doesn't have to be set up, but if the group wants one, open a new email account also in the group name with a small difference, eg OxfordVerification@gmail.com. You could also use the Zoom email address. (if you use Zoom) so long as it's a generic email address and not in someone's personal name. This set-up allows for rotation of service, while maintaining the same accounts in the group name. Change passwords when members leave service positions.

11. Verify your phone number. Click Send.
12. The verification code will be sent by text to your phone if you select Text.

DONE

13. **2nd step is to set up a PayPal account for your 7th Tradition donation fund (same email address as used for the group email [IMPORTANT: with different password]):**

14. <https://www.paypal.com/uk/signin>

15. Sign up
16. Select "Personal Account". Agree to the Terms & Conditions.
17. Enter your mobile number.
18. Security prompt (solve a puzzle)...enter
19. Receive code via text.
20. Enter the code
21. Set up profile: Enter the group email and group name (Not your own first and last name). Enter your date of birth. Enter your address and post code. (this can be changed with each rotation of service, but the group name cannot)
22. Enter first name: OxfordTuesday
23. Enter surname: SixThirty
24. Enter the email (previously set up as above)
25. Example (same as Gmail email address: Oxford.Tuesday630@gmail.com)
26. Create a password for the PayPal account, eg: Oxford630T& (IMPORTANT different from the email accounts).
27. Enter your telephone number
28. Important for security: Do not use the previously set-up email password; choose a different password that only the account holder (usually the treasurer) would use, which is passed on upon rotation of service.
29. An email will come through to Oxford.Tuesday630@gmail.com asking you to confirm your email address.
30. Log into your email address, and receive the email, and confirm.

DONE

1. Before closing your old PayPal account, download transactions (to keep a record of all transactions)
2. Transfer all funds from your old PayPal account to this new one.
3. Create a PayPal.me link and share it to your group. You do not need to connect a bank account, but you can do, for example to make payments to payees who can't receive PayPal payments. Ideally, your group would also have a bank account in the group name which is connected to its PayPal account.