

Setting up Payment Gateways

Using DataCash as a Payment Service Provider

What is on the EROL CD for Datacash

On the EROL CD you will find a DataCash folder containing a Templates subfolder. The folder contains the following HTML pages:

erol_datacash.html
dc_success.html
dc_failure.html

The default DataCash HTML pages

These are all the HTML pages you will need to successfully set up your EROL order process with the DataCash transaction system once you have an account with DataCash. These pages cannot be edited in EROL itself but can be customised to suit the look and feel of your store using any web editor. Ensure that all hidden fields already in these pages are not deleted or removed.

erol_datacash.html – The default page that will read in the order details from your EROL store and display them as non-editable fields and add the credit card input fields to the top of the page.

dc_success.html – The default page that gets displayed following successful authorisation of your customer's credit card.

dc_failure.html – The default page that gets displayed following unsuccessful authorisation of your customer's credit card.

Customising the HTML pages

The HTML files can be edited to allow you to customise the look of your order form. If you choose to edit these HTML files:

1. Ensure that all hidden fields required for your store are kept intact.
2. Any images used **must have** relative paths to the HTML document within the same directory. ie. . Do not include paths to any subfolders for any images or other media in your page.
3. Submit your file(s) to **support@erol.co.uk** who will upload your file(s) to the EROL Secure Server and give you a reference path for your EROL Store.

Setting up your EROL/Datacash Account

In the Store Settings window, click on Payment in the menu. This will bring up the Payment tabs. Click on Gateways tab and several fields will appear. To use DataCash, select DataCash from the Order Method dropdown. The fields required to enable the connection to your DataCash account will become active. The active fields are:

Your E-mail: The recipient e-mail address of, typically, the vendor to receive orders

Target Script: This will automatically be filled with the correct path to the DataCash script.

Merchant ID: This will be given to you by DataCash

Password: This will be given to you by DataCash

Secure Form: The name of your Secure Form HTML page containing Credit Card input fields.

Confirm Page: The name of your Order Confirmation HTML page, displayed after a successful card transaction.

Reject Page: The name of your Order Failure HTML page, displayed after an unsuccessful card transaction.

EROL Support will give the correct path(s) to these fields to you after you have sent the files in for upload to your account. If you do not put anything in these last three fields, they will default to the basic template forms.

Going Live

Your store, once set up to work with DataCash, is ready to trade. It is best to test your store 'behind closed doors' with some test credit card numbers that can be used to create successful transactions. These numbers are available from DataCash.

Using Secure Trading as a Payment Service Provider

What is on the EROL CD for Secure Trading

On the EROL CD you will find a Secure Trading folder containing a Templates subfolder. The folder contains the following files:

form.html
success.html
failure.html
customeremail.txt
merchantemail.txt
failureemail.txt

The default Secure Trading files

These are all the files you will need to successfully set up your EROL order process with the Secure Trading transaction system. These pages cannot be edited in EROL itself but can be customised to suit the look and feel of your store using any web editor. Ensure that all hidden fields already in these pages are not deleted or removed.

form.html – Your credit card Order Form. This gets displayed once a customer has clicked on 'Send Order' from EROL.

success.html – This page is displayed once a successful transaction has been made.

failure.html – This page is displayed if a transaction fails.

merchantemail.txt – This file contains the text contents sent via e-mail to you, the vendor, after a successful transaction.

failureemail.txt – This file contains the text contents sent via e-mail to you, the vendor, after a transaction fails. The customer will **not** receive this e-mail.

customeremail.txt – This file contains the text contents sent via e-mail to your customer after a successful transaction.

Customising the HTML pages

The HTML files can be edited to allow you to customise the look of your order form. Any images you use in these pages must be submitted to support@securetrading.com when you send your templates in for uploading to your server account.

To work on the Secure trading server, images used in the HTML files should have the image source path set to the following:

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where '\$path' is resolved automatically in the page once your pages are on the server.

With this in mind you can now add images to completely design and customise your order form pages on the Secure Trading server.

By default, the HTML files contain all the necessary fields to work with EROL. You may, however, choose to edit these files to remove some of the fields that your store does not require ie. 'Additional Field'.

Similarly, you may edit the three e-mail TXT files by removing fields labels or adding additional copy pertaining to your store.

Testing your EROL store before going live

Your Secure Trading account is automatically set to Test Mode. Whilst in Test Mode, the server simulates your live store functionality, allowing you to thoroughly test your EROL store before actually going live.

Setting up your EROL/Secure Trading Account

In the Store Settings window, click on Payment in the menu. This will bring up the Payment tabs. Click on Gateways tab and several fields will appear. To use Secure Trading, select Secure Trading from the 'Order Method' dropdown. The fields required to enable the connection to your Secure Trading account will become active. The active fields are:

Target Script: This will automatically be filled with the correct path to the script.

Merchant ID: This will be given to you by Secure Trading.

Your Email: Insert the recipient email address for all orders.

Testing your EROL store before going live

Whilst your account is in Test Mode, your payment order form is secure but only valid test card numbers can be used to create successful transactions. These numbers are available from Secure Trading. E-mail support@securetrading.com with your Merchant ID reference number.

Going Live

After activating your Secure Trading account, you do not need to change any of the settings within EROL.

Using Worldpay as a Payment Service Provider

What is on the EROL CD for Worldpay

On the EROL CD you will find a WorldPay folder containing a Templates subfolder. The folder contains the following HTML pages:

submit.html
input.html
confirm.html
thanks.html
sorry.html

As well as the image file:

logo.gif

Should you wish, you can also download these files from your WorldPay account FTP area.

The default Worldpay HTML pages

These are all the HTML pages you will need to successfully set up your EROL order process with the WorldPay transaction system. These pages cannot be edited in EROL itself but can be customised to suit the look and feel of your store using any web editor. Ensure that all hidden fields already in these pages are not deleted or removed.

submit.html – A test order submission form with basic information to enable the testing of your other template pages during the testing phase. Once your store is live, this page is not used.

input.html – The main credit card input form which is displayed when order details are submitted to it, either via the EROL order form (or submit.html during your testing phase). This page contains the credit card input fields.

confirm.html – An intermediate page that gets displayed immediately after submission of card details, but before authorisation of the card. The page will display the customer's order and card details. This page is not editable by the customer, but will allow them to go back to input.html should they need to change any of their card details.

thanks.html – The page that gets displayed following successful authorisation of your customer's credit card.

sorry.html – The page that gets displayed following unsuccessful authorisation of your customer's credit card.

Customising the HTML pages

The HTML files can be edited to allow you to customise the look of your order form. Any images you use in these pages should have the following path:

`/worldpay/mystore/logo.gif`

where 'mystore' is the Store Name reference given to you by WorldPay. For example, if your Store Name reference is BLOGGS, your path to images would be:

`/worldpay/bloggs/logo.gif`

With this in mind you can now add images to completely design and customise your order form pages on the WorldPay server.

Testing your EROL store before going live

When your account is set up, you will be given a path to a 'staging' server. The staging server simulates the live store functionality, allowing you to thoroughly test your EROL store before actually going live.

Setting up EROL for your Worldpay Account

In the Store Settings window, click on Payment in the menu. This will bring up the Payment tabs. Click on Gateways tab and several fields will appear. To use WorldPay, select WorldPay from the Order Method dropdown. The fields required to enable the connection to your WorldPay account will become active. The active fields are:

Target Script: This will automatically be filled with the correct path to the script.

Merchant ID: This will be given to you by WorldPay.

Password: This will be given to you by WorldPay. (Important Security Note – Your password is only required by EROL when your store is in 'test mode'. When your store goes live, you will have to change the Secure Form path (see below) and you must remove your password from the Password field.)

Your Email: Insert the recipient email address for all orders.

Secure Form: During your (compulsory) testing phase input the path to your staging server account i.e. <http://mystore.staging.worldpay.com> (where 'mystore' is your merchant ID)

After testing you will need to change this to the default live transaction server by inputting the following path: <https://secure.worldpay.com>

Using the Worldpay Administration area

When you have a WorldPay account set up, you will be given access to an Administration area where you can set various parameters of your account. These parameters include setting global fonts, styles and colours and, more importantly, allows you to set up to eight fields for EROL to use. Five of these fields are compulsory.

How to change the fields for EROL:

1. Log in to your WorldPay staging account Administration section.
2. Click 'Customise your credit card entry page'.
3. Click 'Custom Data Entry'

You will see a list of 8 available fields which will be labelled 'Custom 1' through to 'Custom 8'. By default, these fields are all inactive, but to use your EROL store you will need to set them up with the following attributes:

<<INSERT SCREEN GRAB: Custom1 Field>>

In Use: This dropdown can be set to 'Yes' or 'No' depending on whether the field should be displayed in the credit card order form or not.

Prompt: The label given to the field to be displayed in the credit card order form. The value of this field will be completed by EROL on the order form page.

Mandatory: This dropdown can be set to 'Yes' or 'No' depending on whether the customer is required to complete the field. By default this is set to 'No'.

Size: This value sets the character width of the field on the credit card order page. The default is 40 characters.

Type: This dropdown can be set to 'Standard' or 'Password'. The default is 'Standard'. Selecting 'Password' will set the field to display the contents as asterisks. It is not recommended to set any of the fields to 'Password'.

Enabling the five compulsory fields

The first five fields in the list are labelled 'Custom 1' to 'Custom 5'.

1. Set the first five fields to be 'In Use'. Select 'Yes' from the 'In Use' dropdown.
2. Change the first five field labels (Prompt) to the following:
Change 'Custom1' to 'Order Reference'
Change 'Custom2' to 'Phone Number'
Change 'Custom3' to 'Fax Number'
Change 'Custom4' to 'Delivery Type'
Change 'Custom5' to 'Additional Info'

Important:

- i) The first field, 'Order Reference', allows the generation of unique order numbers for each EROL order.
- ii) The first five fields must be set in the same sequence as above or you will receive incorrect field values.

If you have used any of EROL's three optional Auxiliary Fields in your order form, set 'In Use' the same number of extra fields on this page. This enables the values of these fields to be sent to you as part of an order.

Change the last three field labels to match the field name(s) you have given to your Auxiliary Field(s) in EROL. Your three Auxiliary Fields match the fields: 'Custom 6', 'Custom 7' and 'Custom 8'.

For example, if you have labelled your three Auxiliary Fields in EROL to 'Purchase Order No.', 'Customer Account No.' and 'Comments', you would then:

Change 'Custom6' to 'Purchase Order No.'
Change 'Custom7' to 'Customer Account No.'
Change 'Custom8' to 'Comments'

Testing your EROL store before going live

When your account is set up, you will be given a path to a 'staging' server. The staging server simulates the live store functionality, allowing you to thoroughly test your EROL store before actually going live.

Note that whilst your account is in staging server mode, your payment order form is not secure. Only test card numbers can be used to create successful transactions. These numbers are available from WorldPay.

E-mail 'receipts' for you and your customer

When an order is authorised, a confirmation e-mail 'receipt' will automatically be generated by WorldPay and sent to:

- a) Your customer
- b) You, as the vendor

This 'receipt' will only contain a unique reference number, a list of the item(s) ordered and the order value. The receipt will *not* include invoice address, delivery address, additional fields etc.

To ensure that the extra details relevant to the vendor (including invoice address, delivery address, additional fields etc.) are listed on the vendor 'receipt', you will need to contact WorldPay support and notify them of your requirement to receive all default and custom field values.

Going Live

Step 1. After activating your WorldPay account, you will need to change the URL of Secure Page in EROL's Payment > Gateways tab in Store Settings.

Change the URL to:

<https://secure.worldpay.com>

Step 2. Delete your password from the Password field.

Step 3. Re-publish your EROL store to the web.