



**ecBuilder Pro**  
Using ClickPay





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# CONTENTS

<b>Chapter 1</b>	<b>Introduction .....</b>	<b>1</b>
	How to Apply for a Merchant Account.....	2
	Set Up a Merchant Account Profile.....	3
<b>Chapter 2</b>	<b>Using ClickPay .....</b>	<b>7</b>
	ClickPay from the Customer's Point of View .....	7
	The Visitor's Point of View .....	8
	Behind the Scenes .....	13
	Using Maximizer OrderDesk to Process ClickPay Transactions .....	13
	Using the ClickPay Back Office .....	14
	Contact Information .....	15
	Account Settings .....	15
	Change Password .....	15
	Virtual Terminal.....	15
	View Transactions.....	16
	Remote Access Configuration (API) .....	16
	<b>Index .....</b>	<b>17</b>





## CHAPTER 1

# INTRODUCTION

**i** *In order to enable SSL-secured transactions, you must obtain and install a digital certificate on your IIS server. See the ecBuilder Pro User's Guide for more on digital certificates.*

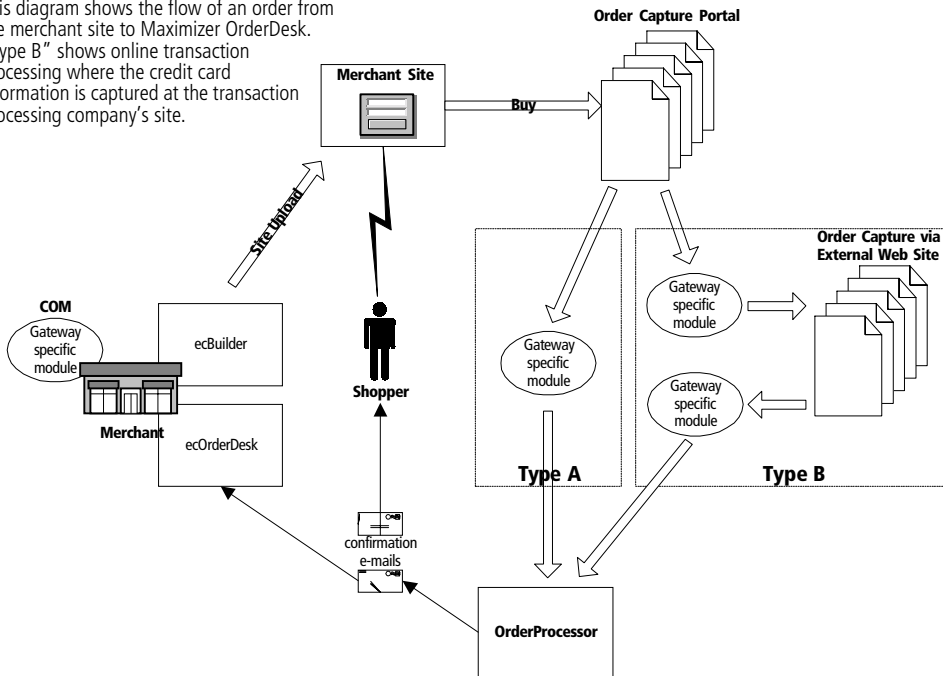
ecBuilder provides support for payment processing through plug-in extensions known as payment gateway modules (PGMs). PGMs encapsulate the interface to a third-party payment processor, and allow the ecBuilder-generated sites to forward merchant-authentication information from a transaction gateway to the respective payment processor.

The merchant authentication information is secured via public-key technology and embedded within the HTML pages generated by ecBuilder. At the time of purchase, the ecBuilder shopping cart forwards the encrypted processing information through a payment gateway module, where it is decrypted and used in conjunction with an SSL-secured order form to then log in to the payment processor and facilitate the credit card authorization process.

The transaction result—whether it is a pre-authorization, a capture, or a refund—is then returned by the processor and forwarded back to ecBuilder, which in turn sends the order information to the merchant as an encrypted e-mail attachment.

In addition to allowing merchants to view the order information received, Maximizer OrderDesk can provide an interface to the payment processor which will enable merchants to submit capture and refund requests to the payment processor post-fulfillment. Maximizer OrderDesk can also operate as a “point-of-sale” terminal for merchants, allowing them to perform authorization requests directly to their third party payment processing company right from their own computer. Both of these features are dependent upon which third-party payment processor you choose.

This diagram shows the flow of an order from the merchant site to Maximizer OrderDesk. "Type B" shows online transaction processing where the credit card information is captured at the transaction processing company's site.



There are several third-party transaction gateway providers directly supported by ecBuilder.



**Note**

In order to take advantage of the online credit card processing capabilities provided by a payment processing gateway, you must set up a merchant account with one of the transaction processing companies.

## How to Apply for a Merchant Account

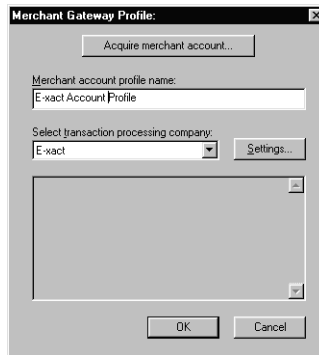
Applying for an ClickPay account is an easy process that you can start in ecBuilder. The ClickPay Web site lets you apply for a merchant account.

For more information, contact ClickPay International customer support.

**i** Rather than following these steps, you may also obtain a merchant account by going directly to the ClickPay site at <http://www.clickpay.net>.

### ➤ To apply for a ClickPay merchant account

1. In ecBuilder, go to the Online Processing screen.
2. Click the Add button. The Merchant Gateway Profile dialog box appears.
3. Select ClickPay from the drop-down list and click the “Acquire merchant account...” button. ecBuilder opens the ClickPay application Web page.



4. Follow the instructions on the screen to complete the application.

Upon approval of your merchant account application, ClickPay provides you with the information you need to configure ecBuilder to work with your ClickPay account.



#### Note

See the following topic “Set Up a Merchant Account Profile” on page 3 or press F1 for additional help.

## Set Up a Merchant Account Profile

**i** Before you can enable online transaction processing in ecBuilder, you must have a merchant account with a credit card company or your bank and a transaction processing company.

If you have a merchant account with a credit card company or your bank, you may wish to set up online transaction processing. Once this is set up, credit card transactions are processed from your Web site and are tracked and maintained through Maximizer OrderDesk. You set up online payment processing in ecBuilder’s Transaction Processing screen by creating a Merchant Account Profile for each account you have with a payment processing company.

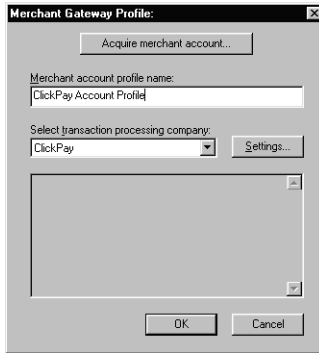
The method and procedures for online transaction processing will vary depending on the transaction processing company. ClickPay allows you to pre-authorize funds, process transactions after the product has shipped, and issue refunds.

➤ **To create a new Merchant Account Profile**

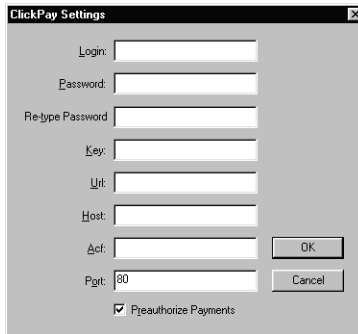
1. In ecBuilder, select Go > Online Processing to change to the Online Processing screen.

The Online Processing screen lets you select the merchant account that you wish to use for your ecBuilder catalog, or add a new profile for a merchant account.

2. Click the Add button to open the Merchant Gateway Profile dialog box.



3. Under "Merchant account profile name", type a short, descriptive name for the profile.
4. From the drop-down list, select the ClickPay transaction processing company. Note that you must have a merchant account set up with ClickPay to proceed.
5. From the Merchant Gateway Profile dialog box, click Settings. ecBuilder prompts you to enter the settings for the merchant account.



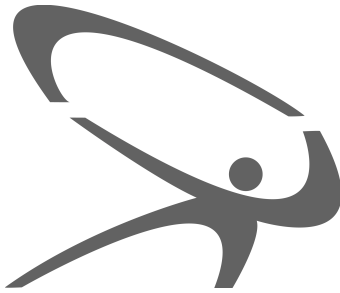
6. Enter the settings for your merchant account and click OK. If you need help with any of these settings, **press F1 in the Settings dialog box** or see the documentation provided to you by ClickPay.

7. Once the settings are entered, click OK in the Merchant Gateway Profile dialog box to finish creating the new profile. The new profile is now selected in the Transaction Processing screen. You also use this profile in Maximizer OrderDesk.

**Note**

You are not limited to the number of profiles or merchant accounts you can use with ecBuilder. The process of setting up different profiles allows you to switch your profile selection in both ecBuilder and Maximizer OrderDesk.





## CHAPTER 2 USING CLICKPAY

ClickPay allows for the pre-authorization, capture, and refund of funds to and from the consumer's credit card. Depending on the settings you enter in ecBuilder for your ClickPay merchant account profile, the orders you receive in Maximizer OrderDesk from your online catalog may also contain credit card pre-authorization information. The consumer's e-mail message will contain confirmation information from the merchant indicating the order has been received.

In addition to allowing you to view the order information, Maximizer OrderDesk provides a direct interface to the ClickPay payment processing server which enables the merchants to directly submit, capture, and refund requests to the ClickPay Processing server after the order has arrived in Maximizer OrderDesk.

If you would like to use ClickPay as a payment gateway for online credit processing, you must set up a merchant account with ClickPay. For more information, visit <http://www.clickpay.net> to learn more about how their system works.

### ClickPay from the Customer's Point of View

If you set up your online catalog to use ClickPay for credit card transaction processing, the result is a seamless integration of the credit card transaction into the visitor's Web experience. At the time that the visitor places an order, ecBuilder collects the visitor's credit card information after the visitor enters his or her name and address.

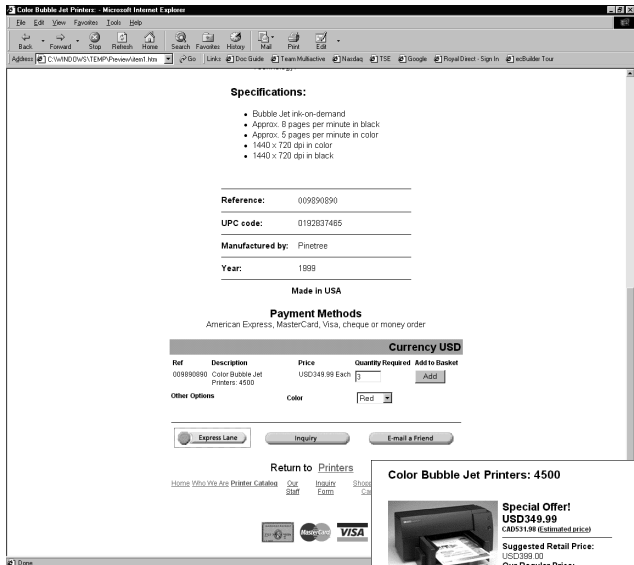
ecBuilder processes the order "behind the scenes". The order arrives as an encrypted e-mail attachment that, when opened, is

automatically imported to Maximizer OrderDesk and marked with the status of the credit card transaction—Payment Received, Payment Declined, Payment Preauthorized, and so on.

## The Visitor's Point of View

If you use ClickPay for processing credit card transactions, here's what a typical shopper will experience:

1. The shopper examines the online catalog, reads the description of a product and decides to buy it, choosing quantity and options, and then clicking Add.



**NOTE:** The shopper has the option on this page of clicking the Express Lane button, which skips the Shopping Cart (step 2) and goes directly to the invoice page (step 3).

- On the Shopping Cart page the shopper reviews the order, including price and quantity, and then clicks "Order Items Now".

**PINE TREE**  
DOCUMENT SOLUTIONS

Home Who We Are Order Catalog Our Staff Inquiry Form Shopping Cart Our Policies Web Links

### Shopping Cart

Items in Your Shopping Basket Currency USD

Reference	Description	Ordered	Amount	Remove
00980090	Color Bubble Jet Printers: 4500 Unit Price: each @ USD349.99 (Color:Red)	3	1049.97	Remove
<b>SUBTOTAL</b>			<b>1049.97</b>	

\*The subtotal does not include tax or shipping. Selecting Order Now will allow you to calculate the final cost.

**Order items now**

**Clear the shopping basket**

[Return to Previous Page](#) [Return to Catalog](#)

Home Who We Are Order Catalog Our Staff Inquiry Form Shopping Cart Our Policies Web Links

**PineTree Document Solutions**  
432 Forest Road, Springfield, OR 97100 United States of America  
Tel: 1 800 555 9899 Fax: 604 555 8888

- The shopper then sees a summary of the invoice, reviews it, and clicks Continue.

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**INVOICE** All prices in: USD

Reference	Description	Ordered	Amount
00980090	Color Bubble Jet Printers: 4500 PRL: each @ USD349.99 (Color:Red)	3.00	1,049.97
<b>SUBTOTAL</b>			<b>1,049.97</b>

**NOTE:** If you receive an error message when you try to use the above link, your browser may not support SSL encryption. You will need a more recent version of your browser, which contains security enhancements, in order to process the transaction.

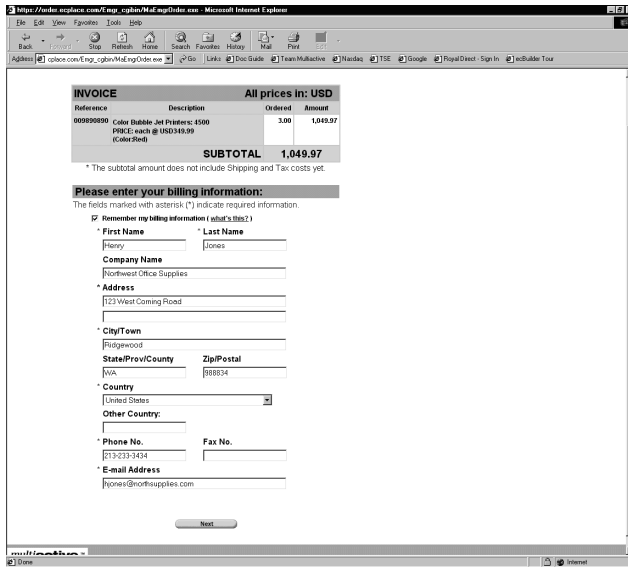
Click on the icon below to download the most recent browser version of Netscape Navigator or Microsoft Internet Explorer.

The Vision: Your Web Security: FAQ.

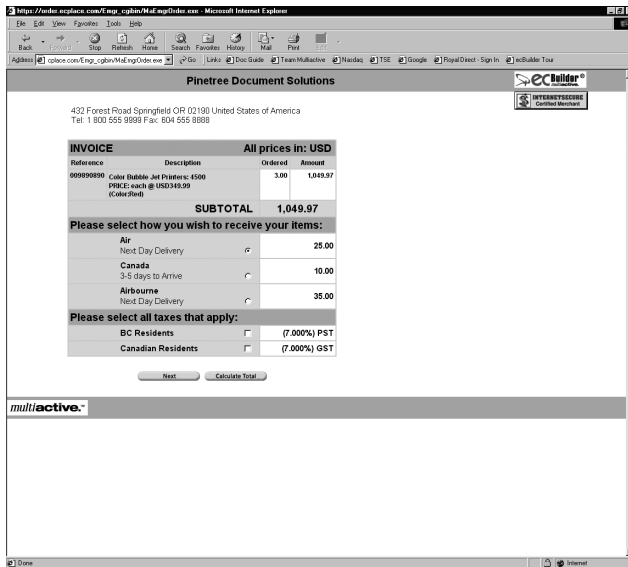
**Disclaimer:**  
The service provided by Multiaactive EC Services Inc. consists of delivering the shopper's order or inquiry requests to the merchant. Multiaactive EC Services Inc. does not assume any responsibility for the fulfillment of the shopper's order, or responding to the shopper's inquiry.

**multiaactive.**

- The ecBuilder order page redisplay the invoice and collects the shopper's name and address. If the visitor is a returning customer, the address information is displayed automatically. The shopper clicks Next.



- The shopper selects a method of delivery and any applicable taxes, then clicks Next.



- Invoice and address information are displayed. Near the bottom of the page, the shopper can choose to pay by credit card or another method.

The screenshot shows a Microsoft Internet Explorer browser window displaying a web page with an invoice and a payment options form. The browser's address bar shows the URL: `http://order.northsupplies.com/emp_cgbin/Mkt.asp?order=...`

**INVOICE** All prices in: USD

Reference	Description	Ordered	Amount
000000090	Color Bubble Jet Printer: 4500 PWE: each @ USD349.99 (ColorJet)	3.00	1,049.97
<b>SUBTOTAL</b>			<b>1,049.97</b>
<b>Shipping/Delivery</b>			
Air	Next Day Delivery		25.00
<b>Taxes</b>			
PST (7.000%)	BC Residents		0.00
GST (7.000%)	Canadian Residents		0.00
<b>TOTAL</b>			<b>USD 1,074.97</b>

**Billing To:**

Name: Jones, Henry  
 Company Name: Northwest Office Supplies  
 Address: 123 West Coming Road, Ridgewood, VA, 000694, United States  
 Phone No: 213.233.3434  
 Fax No:  
 Email: hjones@northsupplies.com

**Please enter your shipping/delivery information:**

Same as Billing contact.

\* First Name: [Henry] Last Name: [Jones]  
 Company Name: [Northwest Office Supplies]  
 Address: [123 West Coming Road]

**Payment Options:**

**Credit Card**  
 Selecting this option will require you to enter your credit card information on a subsequent page.

**cheque or money order**  
 Please enter Payment Detail (cheque or money order):  
 With this payment option, your order will be processed after submitting this page. There will be NO further request for confirmation.

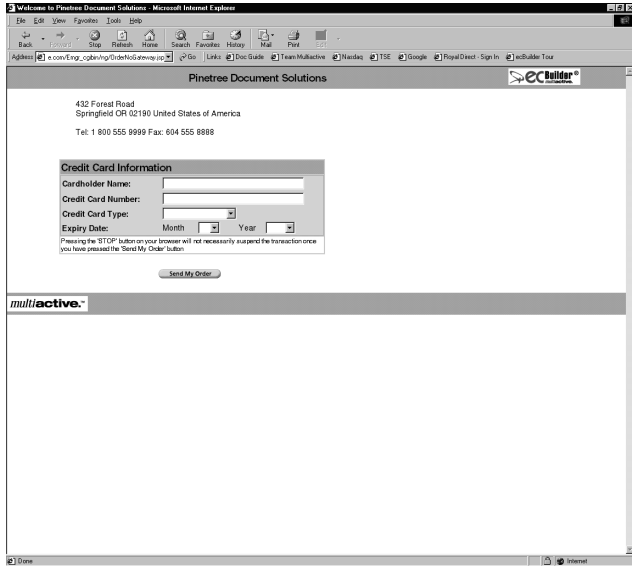
**Please complete the following:**

The fields marked with asterisks (\*) indicate required information.

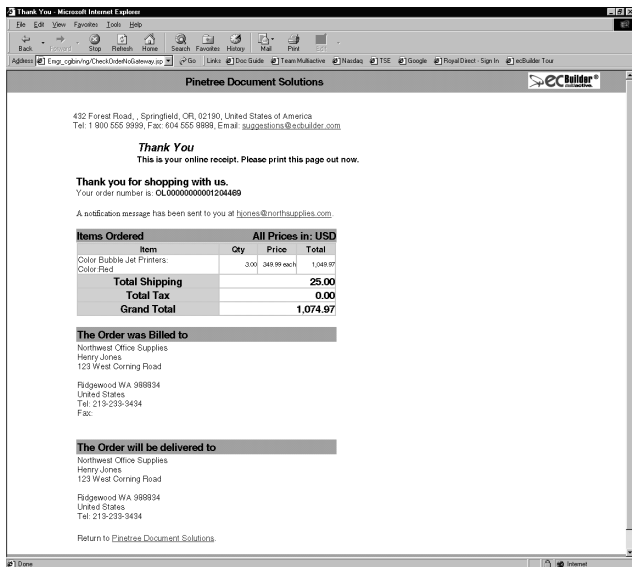
\* How did you hear about our site?  
 [from a friend]  
 \* Did you find what you were looking for?  
 [yes]  
 \* Would you like us to contact you?  
 [please]

**Additional information:**  
 Please supply additional information for your order (maximum 600 characters)  
 [Text area]  
 [Next] [Cancel My Order]

- If paying by credit card, the shopper enters the credit card information and clicks Submit.



- A thank you page notifies the shopper that the transaction is complete and displays the details of the order, including an order number that will be sent by e-mail.



## Behind the Scenes

**i** The e-mail address you enter in the Site Builder Profile screen appears in the Contact Person Profile screen as the “Contact’s E-mail Address”. If you’d like this address changed, do so in the Site Builder Profile screen.

Behind the scenes, the ecBuilder order page sends the visitor’s credit card information to ClickPay, which responds by sending the transaction record back to the server. The order and the results of the credit card transaction are automatically sent to you (the merchant) as an encrypted e-mail attachment, which you open to bring the information into Maximizer OrderDesk. As well, the ecBuilder order page generates a notification e-mail. Both of these e-mails are sent to the e-mail address you enter in the Site Builder Profile screen of ecBuilder. You can also specify to have orders and inquiries sent to three additional e-mail addresses in the Contact Person Profile screen.



### Note

If you are using multiple e-mail addresses (entered in the Contact Person Profile screen) for e-mail notification of orders and inquiries, make sure you install the same digital certificate that you use to publish your site on each computer receiving notification. For more information, please refer to the section on “Importing and Exporting Digital Certificates” in the ecBuilder Pro User’s Guide.

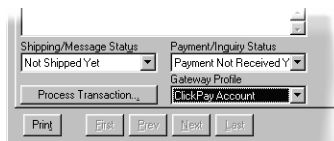
## Using Maximizer OrderDesk to Process ClickPay Transactions

If you’re using ClickPay as an online transaction processing gateway, you can process credit card transactions online using Maximizer OrderDesk. You can use Maximizer OrderDesk to perform one of four types of transactions: Purchase, Pre-authorize Purchase, Complete Pre-authorize Purchase, or Refund.

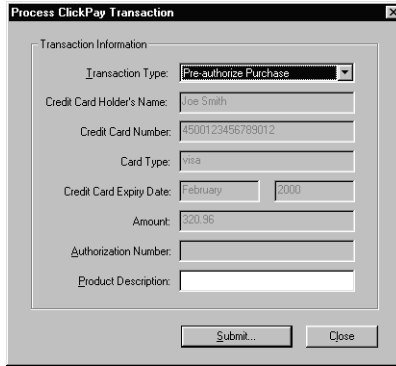
**i** One of the options when you set up your ClickPay merchant account profile in ecBuilder is the “Pre-authorize Payments” option. With this option selected, ecBuilder uses ClickPay to pre-authorize the purchase only—no funds are transferred. In this situation, you use Maximizer OrderDesk to “Complete Pre-authorize Purchase”.

### ➤ To process a credit card transaction in Maximizer OrderDesk

1. Open Maximizer OrderDesk.
2. Locate and double-click the order to open the Order dialog box.
3. Under “Gateway Profile”, select the merchant account profile for ClickPay and click the Process Transaction button.



4. In the Process ClickPay Transaction dialog box, select the type of transaction you wish to perform: Purchase, Pre-authorize Purchase, Complete Pre-authorize Purchase, or Refund.




**i** If any information is incorrect in the Process ClickPay Transaction dialog box, simply click Close to return to the Order dialog box and make the necessary changes.

5. Verify the credit card information and the transaction amount.
6. Under "Product Description", type a short description of the transaction or use the default description.
7. If the information displayed is correct, click the Submit button to submit the information to ClickPay for processing. Maximizer OrderDesk displays a message indicating the result of the transaction.

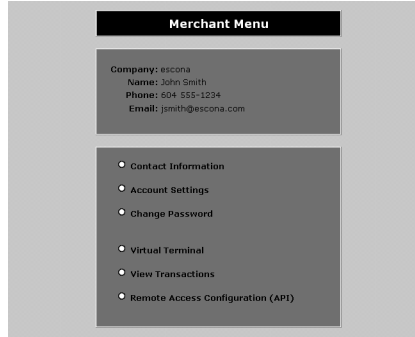
## Using the ClickPay Back Office

ClickPay has a "Back Office" Web site in which ClickPay members can perform administrative functions. Among other options, you can:

- Change the contact information for your ClickPay merchant account
- Change your ClickPay password
- Use the ClickPay Virtual Terminal to enter transactions
- Track all your transactions
- Access the settings you need to create a merchant account profile for ClickPay in ecBuilder
- To log into your ClickPay account using the ClickPay Back Office, use your Web browser to go to <http://www.clickpay.net/login.htm>.

 To find out more about any of the options in the ClickPay Back Office, refer to the documentation provided by ClickPay.

After you enter your ClickPay member name and password and click Submit, the Merchant Menu page opens.



## Contact Information

This option in the Merchant Menu lets you view or change the contact information that you provided to ClickPay for your merchant account.

## Account Settings

This window allows you to change the currency in which you charge your customers with ClickPay's Virtual Terminal. This option only affects the manually processed transactions, and not your ecBuilder online catalog. Neither does it affect the currency in which you will receive payments. You can choose from the twenty-six currencies accepted by the credit card networks.

## Change Password

This function lets you change the password needed to log in to the ClickPay Back Office.


## Virtual Terminal

With ClickPay, your customers' payments are normally processed directly and automatically from your Web site, in real-time. The Virtual Terminal options enables you to process a transaction manually, if you have a customer's credit card number.

It is important to note that any transactions that you enter using the ClickPay Virtual Terminal will not be recorded in Maximizer

OrderDesk. You should, therefore, use Maximizer OrderDesk for processing ClickPay transactions.

## View Transactions

 For more on viewing transactions using the ClickPay Back Office, refer to the documentation you received from ClickPay—“ClickPay Back Office Manual and FAQ”.

This function allows you to track all your transactions, whether they have been entered by your customers directly on your Web site or by you (manually using the ClickPay Virtual Terminal).

## Remote Access Configuration (API)

This option lets you view the production variables that you need to set up a merchant account profile for ClickPay in ecBuilder. See “Set Up a Merchant Account Profile” on page 3.

# INDEX

## A

- account application 2
- account settings 15
- application 2

## B

- Back Office 14

## C

- capture 7
- ClickPay 7
  - account settings 15
  - Back Office 14
  - contact information 15
  - password 15
  - remote access 16
  - view transactions 16
  - Virtual Terminal 15
- configuration 3
- confirmation 7
- contact information 15

## D

- digital certificate 1

## E

- ecBuilder Pro 3
- e-mail attachment 7, 13
- e-mail notification 13
- encrypted attachment 7

- encrypted e-mail 13

## M

- Maximizer OrderDesk 3, 7, 8, 13
- merchant account 2, 3
- Merchant Account Profile 3
- merchant authentication 1

## O

- online transaction processing 2, 3

## P

- password 15
- Payment Declined 8
- payment gateway modules 1
- Payment Preauthorized 8
- Payment Received 8
- PGM 1
- point-of-sale 1, 15
- POS 15
- pre-authorization 7
- pre-authorize funds 3
- process transactions 3

## R

- refund 7
- remote access 16

## S

- Site Builder Profile 13

SSL 1

## T

transaction gateway 2

transaction processing company 3

ClickPay 7

## V

view transactions 16

Virtual Terminal 15