

Erol 4 setup guide

Version 2.0

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Document revised on 23-Nov-2006.

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1 Introduction

This document explains how to use version 4 of Erol (Erol4) with ST Payment Pages. It may be possible to configure other versions of Erol in a similar way, but this has not been tested by SecureTrading. Visit <http://www.erol.co.uk> for the latest version of Erol.

1.1 SecureTrading terminology

SecureTrading secure server	The secure server that is accessed when the merchant's customers submit orders.
Merchant web server	The server that contains the merchant's website. This server does not need to be a secure server.
Test mode	In test mode, transactions are passed to the SecureTrading Test Bank, and not to the merchant's acquiring bank. The SecureTrading Test Bank is a "dummy" bank set up to behave like the real banking networks, so although the correct responses are generated, no funds are transferred. You will not be charged for any transactions made while you are in test mode.
Live mode	In live mode, transactions will be sent to a real bank for authorisation. Any authorised transactions will be charged for appropriately and will be settled unless otherwise instructed.

1.2 SecureTrading account

Before you can integrate your website with SecureTrading, you will need to apply for a SecureTrading account. For information on how to do this, see the page <http://www.securetrading.com/index.cfm?alias=getstart> on our website, or contact us at:

SecureTrading Ltd
European Operations Centre
Parc Menai
Bangor
Gwynedd LL57 4BL

Tel: 01248 672 070
Fax: 01248 672 079

Please let us know that you will be using Erol4 on your merchant web server, so that we can set up your account accurately.

1.3 Sitereference

You will be sent a "Welcome" email to confirm that your SecureTrading account has been set up. This contains your *sitereference*. Your sitereference is important: you will need to quote it in ALL correspondence with SecureTrading, so please make it available to any of your staff who are likely to contact us (such as your developers, or other technical staff). Also, you will need your sitereference to configure your website correctly.

2 Configuring Erol4

Erol4 allows you to set up a website where your customers can add items to their shopping basket, and also view the contents of the basket and see the details of what is being purchased.

Erol4 can be easily set up to work with ST Payment Pages. Once your customer wants to pay for your products (i.e. they select the checkout option on your website), he or she is taken to a credit card details form on the SecureTrading secure server. In this way, all credit card details are held in a secure location rather than on a “standard” web server.

2.1 Configuration

We will assume that you have installed Erol4 on the merchant web server, and have designed and set up your merchant website – or have at least created some fictitious items, so that you can send a test order to check that the system is working correctly.

Erol4 has an inbuilt option to allow your website to be integrated with SecureTrading. To select this option, follow these instructions:

1. In My Store, select the *Store Setting* tab on the left hand side. This will expand the tree.
2. Select the *Checkout* option. This expands another tree. Then select the *Payment* option.
3. Select the *Online* tab in the window and click on “Use a Payment Gateway” and select SecureTrading from the drop down box. Enter your sitereference in the *MerchantID* box (note: the sitereference is case sensitive; enter it **exactly** as quoted in your “Welcome” email).
4. You may also want to receive emails confirming that your customer has placed an order with you. To do this, click the *payment* tab and enter your email address in the *email* box.

3 Testing

Your SecureTrading account is set to test mode when it is first set up, so that you can test integration of your merchant website with the SecureTrading system. In test mode, the SecureTrading system generates the same responses as it does in live mode, but no transactions are settled, and so no money is transferred. We will not switch your account to live mode until you request us to do so, after finishing your testing.

To test the integration of your merchant website, browse to the site with a web browser and put together a test order. The customer email address that you enter on the checkout page should be a genuine one that you have access to, so that you can check that the customer receives the correct email response.

Click the *send order* button and you will be taken to the credit card details form on the SecureTrading secure server. If you enter the following credit card details:

```
Card type      VISA
Card number    4111 1111 1111 1111
Expires end    12/10
```

you will get a successful transaction response. You should see the page `success.html`, sent from the SecureTrading secure server, a confirmation email should be sent to both the customer email address and the merchant email address.

If you use the following credit card details:

```
Card type      VISA
Card number    4242 4242 4242 4242
Expires end    12/10
```

you will get transaction declined response. You should see the page `failure.html`, sent from the SecureTrading secure server, and a notification email should be sent to the merchant email address.

Note: you should **only** use these two test card sets while you are in test mode, though you can run a test as many times as you wish.

4 Customisation

The SecureTrading system uses several files – web pages and emails – which can be customised to match the appearance of the rest of your website. These are:

customeremail.txt	The email sent to the customer following a successful transaction
failure.html	The web page the customer is taken to following a declined transaction
failureemail.txt	The email sent to the merchant following a declined transaction
form.html	The form presented to the customer to enter his/her credit card details
merchantemail.txt	The email sent to the merchant following a successful transaction
success.html	The web page the customer is taken to following a successful transaction

The default versions of these files, which you can customise to your own requirements, are available as a .zip file at:

<http://www.securetrading.com/index.cfm?alias=erol3>

Once you have customised these files, you should upload them to the SecureTrading secure server using the file manager facility of My-ST, our online management system. If you do not upload the customised files then you and your customers will see the default files instead.

For information on customising these files, download the ST Payment Pages Setup Guide from:

<http://www.securetrading.com/index.cfm?alias=dl-stpp>

Although this guide is written for merchants who are using custom or bespoke systems rather than commercially-available shopping carts, the sections on customisation are relevant to Erol4. Ignore the references to `orderpage.html`, however, as the shopping cart software provides the functionality of this page.

Note: any changes to the default forms, web pages and emails must be in accordance with Article 4.1 of the SecureTrading agreement form, as signed by the merchant upon requesting a SecureTrading account.

5 Going live

Details of how to switch your SecureTrading account to live mode are explained in the *Going Live Guide*, available from:

<http://www.securetrading.com/index.cfm?alias=dl-genset>

You should only switch to live mode once you are completely satisfied with your site, you have tested the payment form with the test card sets and you have successfully uploaded any customised files to SecureTrading.

6 Checklist

- Ensure you have had your sitereference
- Tell SecureTrading you are using Erol4
- Install Erol
- In *Build Your Store| Basket| Payment| Online| Use a Payment Gateway* select *SecureTrading* from the drop down box
- Enter your sitereference
- Enter your email address in the *Your Email* box
- Download, customise and upload default files, if necessary
- Test your website to your satisfaction before requesting to switch your account to live mode.

7 Troubleshooting

- Make sure you are using an online version of your site.