



Guide for Evolve Users using a Secure Trading gateway

(to illustrate simple steps for integrating Evolve with Secure Trading).

The objective is to accept online payments through Secure Trading. So when customers order from your Evolve site they will be redirected to the Secure Trading payment page who will authorise and accept the credit card payment from the customer, and ultimately pass it on to you.

Integrated with Secure Trading, your store will adopt a 4-step ordering process:

- On your main site a customer buys a product. They are then taken to the Evolve Shopping Cart. In the Shopping Cart they choose the shipping zone and class, which will determine the shipping and tax for subsequent pages.
- From the Shopping Cart they are taken to the Order Form - here they complete their contact and delivery details. You can control what fields to display, their titles and the validation required (ie what fields must the customer complete). Credit card details will not be asked for here, as the payment gateway will ask for these.
- From the Order Form you are taken to the Secure Trading payment page. Here the customer is prompted for their credit card details. Secure Trading uses this information (together with the invoice address keyed in on the Order Form) to help validate the form.
- When the customer confirms payment on the Secure Trading payment page, he is taken to the final Evolve Confirmation Page (if the payment fails he is also taken to the Confirmation Page).

All these forms, except for the Secure Trading payment page (you can alter the look and feel in your Secure Trading Merchant Services area), can be customised in the Evolve admin area **Preferences -> Layout**. There is also a confirmation message that can be set to appear on the Confirmation Form. This is set in **Preferences -> Payment Options -> Step 2**.

You will be able to check the status of an order in a number of ways. These are discussed below under **Testing**.

Now follow these steps to integrate with Secure Trading:

1. Register with Secure Trading - By now you will have explored the services provided by the different Payment Gateways and decided Secure Trading is the one for you. From the Evolve area go to **Preferences -> Payment Options**, choose Secure Trading and click on the **Register** button, and follow the links to submit your registration form. Secure Trading will guide you through a registration process. As part of the process you will need to set up a Merchant account (a bank account allowing you to accept on-line payments). This can be with LloydsTSB, Natwest, Barclays, Bank of Scotland or HSBC.
2. Go to **Preferences -> Payment Options -> Step 1**. Enter the name of your site reference (provided by Secure Trading upon registering) into the Merchant ID box. Then click the Save button.
3. Logon to your Secure Trading Merchant Services area (Secure Trading will have provided you with all the relevant information to do this, and will have provided you with a logon and password). Go to the **File Manager**. In the File to Upload box key in the address "http://angel/merchant4_1/code/form.html" and then click Upload file.
4. Do the same for the addresses "http://angel/merchant4_1/code/callback.txt" and "http://angel/merchant4_1/code/callback-f.txt"
5. **Testing**
 - i. Your account with Secure Trading will automatically be in test from when you first register
 - ii. You can try ordering goods from your site and check that it is working. Use credit card number 4111 1111 1111 1111 (Visa) for testing valid payments and 4242 4242 4242 4242 (Visa) for testing failed payments.
 - iii. You can view the payment status in a number of ways:
 - Secure Trading will send you an email with details of the payment made, the customer, whether the payment was authorised or failed (and if not why not).
 - You will receive an email from Evolve with similar information about your order and a summary of whether the payment was authorised or cancelled.
 - You can log in to the Merchant Services area in Secure Trading to check payment status (from here you can make refunds etc)
 - In the Orders area of Evolve you can check the payment status (and the Secure Trading transaction reference).
 - If the payment has not been completed (for example the customer closes the browser window while on the Secure Trading payment page), then you will still receive an email and in the Orders area the status of the payment will show as "Not Completed"
 - iv. The customer will be aware of payment status in the following ways:
 - The Evolve Confirmation Page will display an error message if the credit card was not authorised
 - If the payment is successful then they are taken to the Evolve Confirmation page and a Secure Trading banner is included confirming payment and a Secure Trading reference number.
 - They are sent an email from Evolve, including status of the payment
6. **Go Live**. When you are happy that payments are being processed correctly then contact Secure Trading to go live.