

PSiGate HTML Conversion Kit

This document contains instructions to help merchants and their developers transfer control of their transaction requests to PSiGate's new payment engine. The new payment engine is backwards compatible for merchants who previously sent their transactions to PSiGate's old payment engine using an HTML form.

The instructions below are meant to convert merchants, who currently use a customized HTML form, to our new payment engine via the HTML Messenger. Review the HTML Messenger document included within the conversion kit and take advantage of the enhancements of our new payment engine by adding HTML elements such as "CardIDNumber" (CVV2, etc.) to your HTML form.

IMPORTANT: Before you convert, you must contact our Merchant Services department and request to go LIVE. You will shortly receive a Welcome Email from one of our Merchant Services representatives. The email will contain your account information. You will use some of this information to configure your HTML capture settings and your HTML form.

Conversion to our new payment engine is a two-step process. The first step involves configuration of your HTML Capture Settings and the second step involves configuration of your HTML form.

Step ONE – Configure your HTML Capture Settings

The HTML capture settings must be configured in order to receive transaction requests from your HTML form. The HTML capture settings also control the behavior of the system in response to transaction requests sent by your HTML form.

- 1) Login to <https://secure.psigate.com> and click on your StoreID.
- 2) Select "HTML Capture Settings", from the Store Menu.
- 3) The HTML Capture Settings Panel below shall be displayed.

HTML Capture Settings Panel

PSiGate™
payment services interactive gateway inc.

Return to Merchant Menu

StoreID: teststore
Curr: CAD

New Order
Express Order

Confirm Orders
Search

Credit Orders
Search

View Orders
Search

View Transactions
Search

View Settlements
View Current
View History

Store Configuration
General Setting
Fraud Setting
E-mail Setting

HTML Capture Setting

Logout

HTML Capture Settings
This is new setup. Make sure you save your changes or they will not take effect.

A Enabled: No

B StoreKey: NEWSETUP

C DBA Display Name: Teststore

D Default Approved URL: https://order.psigate.com/test/thankyou.asp

E Default Declined URL: https://order.psigate.com/test/nothankyou.asp

F Capture Setting: PSiGate Captures Card Data

G Capture Form:

```
<html>
<head>
<title><DBA> Credit Card Validation</title>
<meta http-equiv="content-type" content="text/html; charset=utf-8">
<link rel="stylesheet" href="<ImagePath>/styles/psigate_orders.css">
</head>
<body>
<a name="top"></a>
<div id="container">

<div id="contentsection">
<CardInfoForPSiGate>
```

H Restrict Referring Hosts: No

I Allowed Hosts:

Results Version: 1.2

Save

- 4) Set the Enabled dropdown, labeled "A" in the screenshot above to "Yes". This setting informs our system to accept HTML transaction requests. The system is set to accept XML transaction requests by default.
- 5) Input your Store Account Name (StoreID) given within your Welcome Email within the StoreKey field, labeled "B" above. This setting informs our system of the store account that is to receive the transaction request.
- 6) If you wish to use PSiGate's SSL-secured credit card collection form, enter within the DBA Display Name field, labeled "C" above, your company name, as you would like it to appear within the form PSiGate's SSL-secured credit card collection form.
- 7) Leave blank the Approved and Declined URL fields, labeled "D" and "E" above.
- 8) Choose from the Capture Setting dropdown, labeled "F" above, "PSiGate Captures Card Data" if you wish PSiGate to collect the credit card information within its SSL-secured webpage OR choose "Card Data is passed to PSiGate" if you wish to collect the credit card information from your SSL-secured webpage. Setting this incorrectly will cause an error.
- 9) If you chose "PSiGate Captures Card Data" in Step 8, you may modify the HTML script labeled "G" above to create a collection form that matches the style and background of your website. If you wish to add logo(s) to your collection form, please email your logo(s) to support@psigate.com with your CID, Store Account Name and the subject heading, "Capture Form Logo Upload".
- 10) Select "No" from the Restrict Referring Hosts dropdown menu, labeled "H" above.
- 11) Leave blank the Allowed Hosts field, labeled "I" above. If you choose not to use the new variables included within the HTML Messenger API, set the Results Version dropdown menu, labeled "J" above to "Backwards Compatible" else set it to "1.2".
- 12) Click the Save button in the bottom right
- 13) Notice that characters have been added to the StoreKey. You will use this new StoreKey when you configure your HTML form.

Step TWO – Configure your HTML form

HTML transaction requests use the customer's browser to transmit instructions to PSiGate. You must modify these instructions so that PSiGate's new payment engine receives the complete transaction request and applies the request to your account.

If you have the ability to test changes below without affecting your LIVE online store, please do.

- 1) Replace your current Merchant ID with the StoreKey, obtained within Step One.
- 2) Change the ACTION to <https://checkout.psigate.com/HTMLPost/HTMLMessenger>.
- 3) Test a transaction. If successful, congratulations otherwise email support@psigate.com with your CID, Store Account Name and the error you received and we will resolve the error promptly.

Testing Instructions

If your company decides to add or modify transaction requests sent to PSiGate, you may perform test transactions outside of your accounts so you do not incur transaction fees. To view the comprehensive list of functions available to you, refer to the HTML Messenger API.

If you are able to test offline, please do so your customers do not experience any difficulties while you are testing.

To test offline:

Change the ACTION to <https://devcheckout.psigate.com/HTMLPost/HTMLMessenger>.

If you use PSiGate's SSL-secured webpage,

- 1) Change your MerchantID (StoreKey) within your test form to "psigatecapturescard001010".
- 2) Change the UserID so that you can easily identify your test from among other testers and do NOT change the credit card number.
- 3) Make your edits.
- 4) Process a transaction with the card number "4111111111111111" and an expiration date in the future.

If you use your own SSL-secured webpage,

- 1) Change the MerchantID (StoreKey) within your test form to "merchantcardcapture200024".
- 2) Change the UserID so that you can easily identify your test from among other testers and do NOT change the credit card number.
- 3) Make your edits.
- 4) Process a transaction with the card number "4111111111111111" and an expiration date in the future.

To view the result of your test transaction(s), log into <https://dev.psigate.com> with the following account information:

CID: 1000001
User ID: teststore
Passphrase: testpass

If you receive an error while performing your tests or your conversion, please notify our Technical Support department by email to support@psigate.com with your CID, StoreName and the details of the error.