SOP PROCESSING CUSTOMERS' CREDIT CARD PAYMENTS WITH DIRECT CONNECT

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TABLE OF CONTENTS

AIM

The use of Direct Connect as a payment gateway to *Priority* enables the automatic transmission of credit card data and approval of credit card payments received from customers. You can also use Direct Connect to create a standing order of credit card payments for a given document (e.g., order, invoice). This is done by getting a token from Direct Connect, which is then used to fill in credit card details automatically when payment is received.

This document describes the setups required to work with Direct Connect, as well as the operations performed in order to record credit card payments.

INITIAL SETUPS

- If you work in the Windows version of *Priority*, install the Priority Lite application server. For details, see Installing the Application Server.
- Fill out the Eshbel referral page to Direct Connect. Under "I have a customer interested in," select Credit/Debit Card Processing. Add your contact details and submit. Direct Connect will then supply you with the following information:
    - The URL of the Direct Connect server (e.g., https://gateway.1directconnect.com/paygate/home.aspx).
    - Your user name and password to enter the Direct Connect server.
    - Your user name and password to enter the web service.
    - Your merchant key.

PROCEDURE

STAGE ONE: SETTING UP THE DIRECT CONNECT HOSTED PAGE

1. Access the Direct Connect web site via the URL you received, using your user name and password to enter the Direct Connect server (see Initial Setups above).
2. In the web page that opens, select Tools. Tip: Consult the User Documentation offered in this menu.
3. Select Hosted Page. This allows you to define the page on which you will record credit card details in Direct Connect.
4. In the Options tab, flag "Page is active" and make any other desired definitions.
5. In the Fields tab, do the following:
    - In the Submit button URL and Error URL fields, record the URL of the *Priority* page to which Direct Connect will send a response. In Windows installations, use the URL of the *Priority* Lite application server (see Initial Setups above); in *Priority* Rich installations, use the URL of *Priority* Rich. Add to the URL the name of the page: directconnect.htm. Example: https://www.eshbelsaas.co.il/eshbel/priority/directconnect.htm.
    - Under Field Visibility, click the + sign next to Order Information and select Total Amount. Select any other fields you wish to display on the hosted page (optional).
6. Use the Appearance, Button and Panels tabs to design the page as desired.
7. In the Security tab, click Generate. This will create a user name and password with which to enter the hosted page. Record these details, as you will need to store them in *Priority* (see below).

Note: You can also click Generate (again) to change your password to the hosted page. If you do so, be sure to revise the settings in *Priority*.

STAGE TWO: RECORDING DIRECT CONNECT SETTINGS IN *PRIORITY*

1. Enter the Direct Connect Settings form.
2. Define a code and description for the installation and flag the Default column.
3. Record the Server Domain. This is part of the URL received from Direct Connect (see Initial Setups above). For instance, if the URL is https://gateway.1directconnect.com/paygate/home.aspx, the domain would be gateway.1directconnect.com
4. Record the Merchant Key received from Direct Connect.
5. Record your user name and password for the hosted page, as created in Stage I (step 7).
6. Record your user name and password for the web service, as received from Direct Connect.

STAGE THREE: RECORDING RECEIPT OF A ONE-TIME PAYMENT

Aim: To record a credit card payment for a customer receipt or over-the-counter invoice, using Direct Connect.

1. Open a receipt/invoice in the Receipts or Over-the-Counter Invoices form and enter the Other Forms of Payment (Details) or Payment by Credit Card/Coupon sub-level form, respectively.
2. Select the desired credit card in the Payment Means column. Tip: Use the Payment Means form to add a new credit card to the Choose list.
3. Designate the Payment Amount.
4. Select Send to Direct Connect from the list of Direct Activations.
5. A web page will open in Direct Connect (this is the hosted page; see Stage I). Use it to record credit card details and then submit the page. You will receive a message indicating that the transaction has been completed. Result: In *Priority*, in the line for the current transaction, the Approved column is flagged, a Confirmation Number is recorded and the transaction ID appears in the Credit Card Slip column.
6. Finish recording the receipt/invoice and finalize it.

STAGE FOUR: CREATING A STANDING ORDER FOR CREDIT CARD PAYMENTS

Aim: To receive a token from Direct Connect, in order to create a standing order for credit card payment for a given transaction (e.g., order, invoice) and to use that token to process future payments.

1. Enter the document in question (e.g., Sales Orders).
2. Enter the Credit Card to Charge sub-level form.
3. Select the desired credit card in the Payment Means column. Tip: Use the Payment Means form to add a new credit card to the Choose list.
4. Select Get Token from Direct Connect from the list of Direct Activations.
5. A web page will open in Direct Connect (this is the hosted page; see Stage I). Use it to record credit card details and then submit the page. You will receive a message indicating that the transaction has been completed. Result: In *Priority*, credit card details (including the token) are recorded in the Credit Card to Charge sub-level form and the Approved column is flagged.

6. When payment is received, open a receipt/invoice in the Receipts or Over-the-Counter Invoices form.
7. Enter the Other Forms of Payment (Details) or Payment by Credit Card/Coupon sub-level form, respectively. Credit card details are recorded there automatically.
8. Select Send to Direct Connect from the list of Direct Activations. You will receive a message when the transaction has been completed. Result: In *Priority*, in the line for the current transaction, the Approved column is flagged, a Confirmation Number is recorded and the transaction ID appears in the Credit Card Slip column.
9. Finish recording the receipt/invoice and finalize it.