Data collection form

Back Office user manual

Document version 1.5

Contents

1. HISTORY OF THE DOCUMENT

Version	Author	Date	Comment
1.5	Natixis Payment Solutions	10/07/2019	• **Customizing the form**: update of the screenshot • **Generating a URL**: redrafting of phrases • **Sending the form to the buyer**: update of the title
1.4	Natixis Payment Solutions	03/04/2019	Update of the document title
1.3	Natixis Payment Solutions	28/05/2018	Addition of information on the process of making the form available online (chapter **Request to make your form available online**)
1.2	Natixis Payment Solutions	08/02/2017	Addition of the chapter **Generating a URL**
1.1	Natixis Payment Solutions	21/07/2016	Initial release of the documentation in DITA format
1.0	Natixis Payment Solutions	20/03/2016	Initial version

2. OBTAINING HELP

For technical inquiries or support, you can reach usfrom Monday to Friday, between 9 a.m. and 6 p.m.

by phone at:	0810004724 Service fee 0,06 € / min + call charge
	for the clients of Banque Populaire
by phone at:	0811363364 Service fee 0,06 € / min + call charge
	for the clients of Caisse d'Epargne
by e-mail:	*supportvad@lyra-network.com*

and via your Merchant Back Office, menu **Help** > **Contact support**

To facilitate the processing of your demands, you will be asked to communicate your shop ID (an 8-digit number) .

This information is available in the "registration of your shop" e-mail or in the Merchant Back Office (**Settings** > **Shop** > **Configuration**).

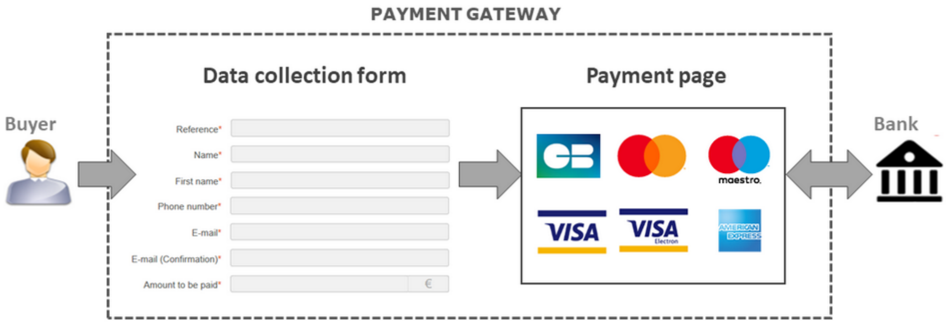
3. PRESENTATION OF THE SERVICE

The payment gateway provides its clients with the **Data collection form** service.

This solution is destined to merchants who do not have an e-commerce website but wish to offer their clients the opportunity to pay online.

The principle is simple:

- The payment gateway provides you with a data collection form hosting service.
  You build your data collection form by inserting as many fields as you wish with all the functionalities of a form (mandatory, optional and pre-filled fields, etc.).
- Your client uses this form to enter the amount of his/her transaction and personal details (first and last name, address, etc.).
- The client validates the form and is automatically redirected to the payment page.
- The client makes an online payment.



Notes

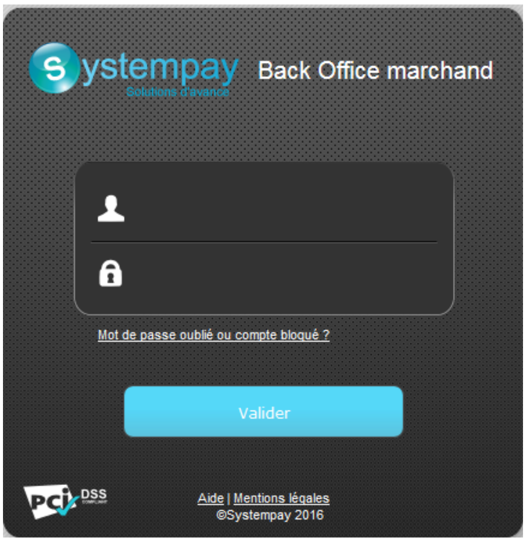
This document provides information only on the implementation and use of the form. For information on:

- *The personalization of your logo on payment pages, see the **Shop logo customization** user manual.*
- *The management of payment orders by e-mail, see the **Payment orders** user manual.*
- *Manual payments, see the **MOTO payment** user manual.*
- *The management of your Back Office, see the **Transaction management** user manual.*

4. SIGNING IN TO THE MERCHANT BACK OFFICE

Sign in the Back Office:

https://paiement.systempay.fr/vads-merchant/



1. Enter your login.

   The login is sent to the merchant's e-mail address (the subject of the e-mail is **Connection identifiers- [your shop name]**.

2. Enter your password.

   The password is sent to the merchant's e-mail address (the subject of the e-mail is **Connection identifiers- [your shop name]**.

3. Click on **Sign in**.

   After 3 password entry errors, the user's account is locked. Click on the link **Forgotten password or locked account** to reset it.

5. ADJUSTING SETTINGS IN THE MERCHANT BACK OFFICE

The implementation of **Data collection form** is very simple. There is no need to have any knowledge about development or technical skills.

In order to allow your clients to pay online via the data collection form, you must follow these steps:

- In your Merchant Back Office (complete only the first time)
  - Step 1: specify the fields to be displayed in your form.
  - Step 2: switch your form to production mode.

  The Merchant Back Office provides the URL that allows to access the form.
- Step 3: send the URL to your clients by e-mail (via your own means or using the pay by e-mail function of the Merchant Back Office).

5.1. Configuring the form

To access form configuration

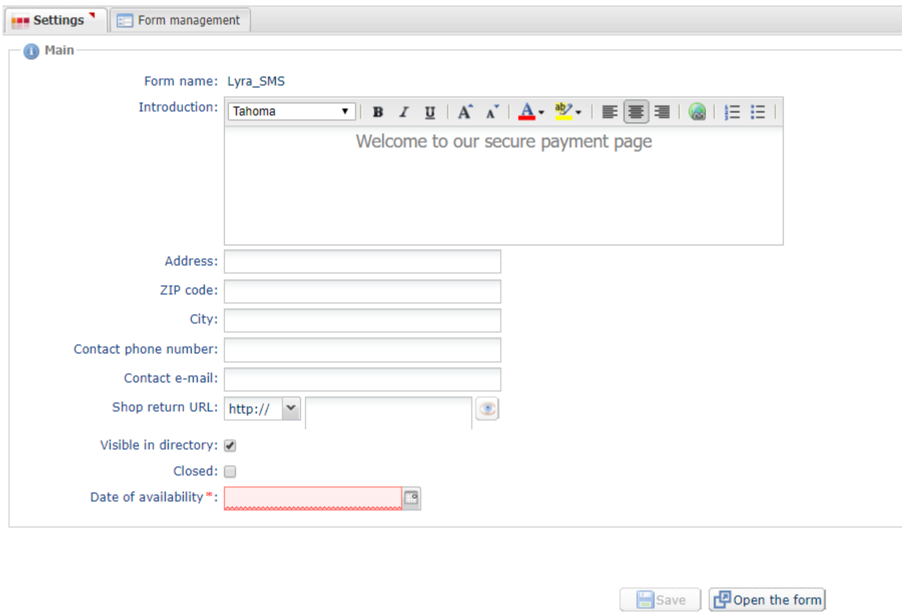
1. Display the menu **Management**
2. Click **Data collection form**
3. And select your shop

   Configuration is done in the **Settings** and **Form management** tabs.

   Note: *Default configuration is available. It can be left unchanged or be adapted to your needs.*

Personalizing the form

In the **Settings** tab



1. Customize the **Introduction**.

2. Change the font, if needed, by choosing another one from the list.

3. Personalize the layout of the text, if you wish, using the icons (alignment, bold, italic, underline, bullet points, etc.)

4. Click the **Source code** button to display the HTML code if you prefer to work in html tag mode.

5. Enter the shop contact details (exact address, phone number, e-mail).

6. Enter the URL for returning to the shop.

   You can test the web address by clicking the **Eye** icon.

   This URL will be used for returning to the shop on the payment pages.

7. Check the **Visible in the directory** box if you would like your website to remain visible in the **"Data collection form"** site directory.

8. Check the **Closed** box if you would like to make your website inaccessible.

   This box defines whether the form is currently accessible online or not.

   Note

   If closed, the website displays the following message:

   This online payment service is temporarily unavailable as requested by the organization that you intend to pay.

9. Enter the **Date of availability** of the form.

   While the website is closed, this date allows to program the date of reopening the website in advance.

10. Click **Save**.

    The confirmation message **Your changes were saved successfully** appears.

11. Click **Open the form** to view the result of the configuration.

Building the form

The form can be created in the **Form management** tab. This tab consists of 3 areas:

- A list of available fields.

  A field list is provided to the merchant. The merchant can also add new fields and configure them.

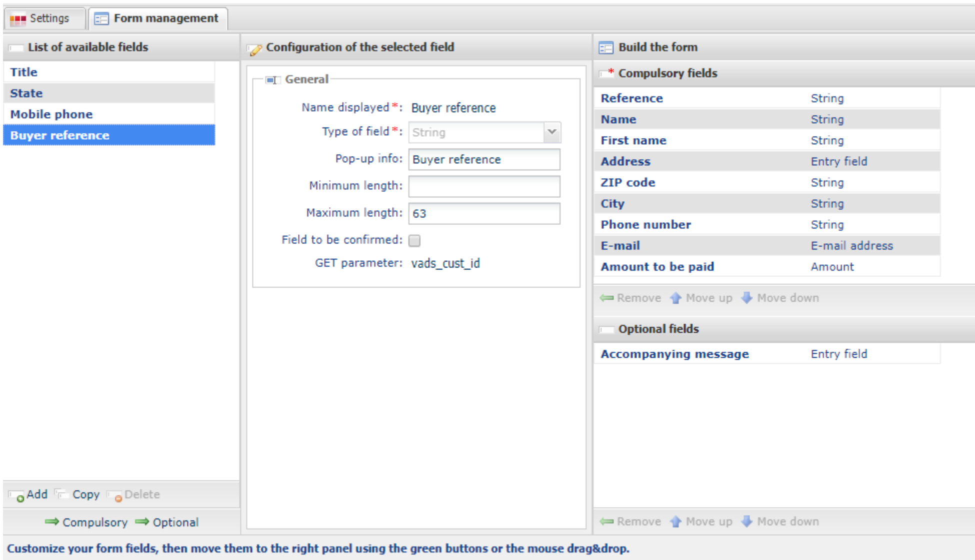
  > *The fields available by default (**Title**, **Last name**, **First name**, **Address**, etc.) are displayed in the language of the shop. If you wish to change the display language of these fields, please contact E-commerce customer service.*

- The field configuration area is selected.

  This area allows to configure the existing and newly created fields.

- The form building area including mandatory and optional fields.

  The merchant uses this area for arranging the form.



<u>In order to add a field or configure existing fields in the **List of available fields** area:</u>

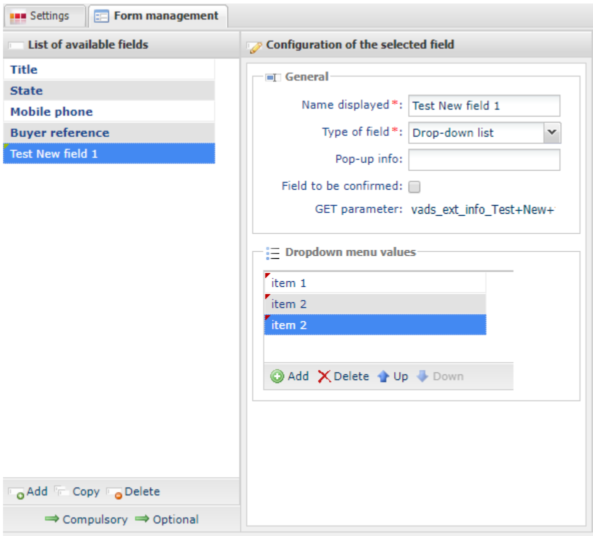
1. Click **Add** to create a new field.
2. Select a field to configure it. You can:
   - configure it by editing its contents displayed in the configuration area of the selected field,
   - **Delete** it,
   - **Copy** it,
   - send it to the mandatory field area, using the **Mandatory** button or the drag and drop feature,
   - send it to the optional field area, using the **Optional** button or the drag and drop feature,

<u>To configure a field:</u>

1. Select the field.
2. Make the desired changes.
   - Personalize the field name in **Name displayed** in case of creating a new field.
   - Personalize the **Field type**, if possible.

     The list includes *Alphanumeric*, *Numeric*, *E-mail address*, *Drop-down list*, *Free-form entry field*, *Date*, *Amount*.

Example of configuration of a new field:



Tip

The merchant can create a new field using a drop-down list. This list will offer the entire field of activity via one single form. It will allow buyers to specify for which activity field they would like to make a payment.

- Personalize the text of the **Tooltip**.

  The tooltip is the information displayed when the cursor hovers over an element that helps users when they fill in information.

- Define the **Minimum** and the **Maximum** number of characters of a field value.

- Check the **Field to be confirmed** box if you want the buyer to confirm the entry of the field value.

  For instance, enter an e-mail and confirm the entry in another field to make sure that the specified address is valid.

To arrange the form display:

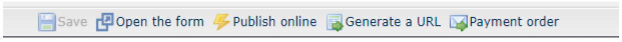
1. Use the **Up** and **Down** buttons for choosing the position of the fields in the form.
2. Use the **Remove** button for deleting a form field or for placing it among the mandatory or optional fields.
3. Click **Save**.

   The confirmation message **Your changes were saved successfully** appears.
4. Click **Open the form** to view the result of the configuration.

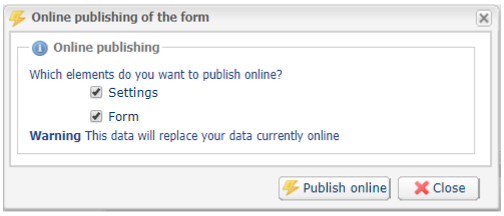
5.2. Publishing the form online

Once the configuration process is complete, you can publish your form online.

1. In the **Form management** tab, click the **Publish online** button at the bottom of the page.



The **Online publishing of the form** dialog box appears.

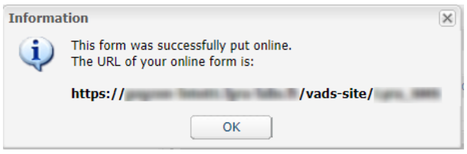


Note

*Clicking the **Publish online** button automatically shifts the shop into Production mode. If the shop is in Test mode, it shifts into Production mode. If it is already in Production mode, nothing changes.*

2. Click **Publish online**.

In case of successful publishing, the information message appears.



Your form is now available in production mode in **Management** > **Data collection form** > [*Your shop*]. You also receive a confirmation e-mail.

In case the publishing fails, you can contact our technical support team and communicate the error message.

Note

*When an online publishing is successfully completed, the additional **Get the online form** button appears. This button allows to retrieve the form in Production mode and to use it in place of the Test form.*

The merchant can generate the production key in the **Settings** menu > **Shop** > **Keys** tab by clicking **Generate the production key**.

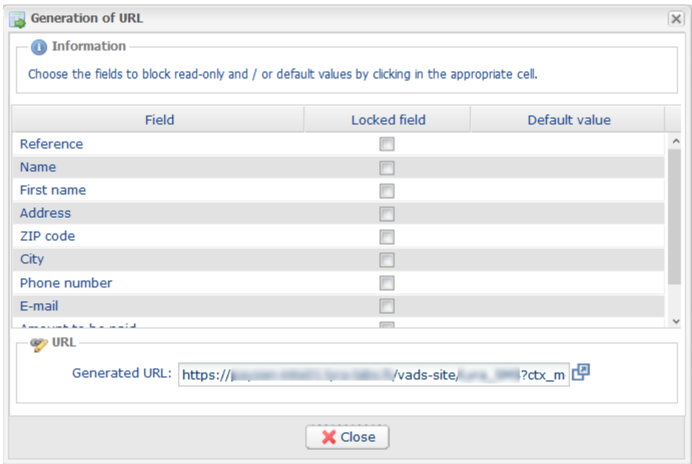
5.3. Generating a URL

The merchant has the possibility to pre-fill a data collection form and generate a URL for accessing this form.

The merchant locks one or more fields and enters the values that he/she wishes to display by default in this form.

1. In the **Form management** tab, click **Generate a URL** at the bottom of the page.

   The URL generation page appears



2. Select one or several fields that you wish to lock by checking the corresponding box.
3. Click the corresponding **Default value** field and enter the desired value.

   For example, the merchant can pre-fill the buyer coordinates, the amount to be paid, the provided service, a supporting message, etc.

   If no values have been entered, the locked field will remain grayed out and will not be editable in the generated form.

   The locked fields and the specified information are added in the payment URL.

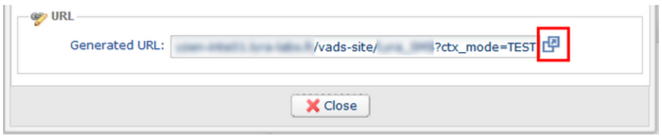
   Example:

```
https://mapagedeformulaire.ledomaine.com/vads-site/MaBoutique?
ctx_mode=TEST&lck_vads_order_id=123654&lck_vads_amount=6999
```

4. Your pre-filled URL is ready.

   Two ways of retrieving the value of the URL:

   - Select and copy the value of the URL in the generated URL field.
   - Or click the **Open the link in a new window** icon.



   The generated URL appears on a web page.

After checking the web page, you can save the URL or send it by e-mail to the buyer. All you need to do is paste the URL in the body of the message.

By clicking the hyperlink received by e-mail, the buyer will display the pre-filled data collection form.

6. SENDING THE FORM TO THE BUYER

In order to allow the buyer to make an online payment, all you need to do is send him/her the URL of the form.

The merchant can send the URL in an e-mail or provide it directly on his/her website in the form of a hyperlink or a clickable button.

Note

The pre-filled information or the information specified by the buyer in the form are accessible in the transaction details via the Merchant Back Office.

In order to define the mode of capture in the bank (automatic/manual), please see the *Hosted Payment Page implementation guide*.