

E-xact Transactions Gateway Configuration Guide

How to integrate the E-xact Transactions automated billing gateway into Helm

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<http://www.webhostautomation.com/>
January 2006
Doc: HELM300.02.09

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Table of Contents

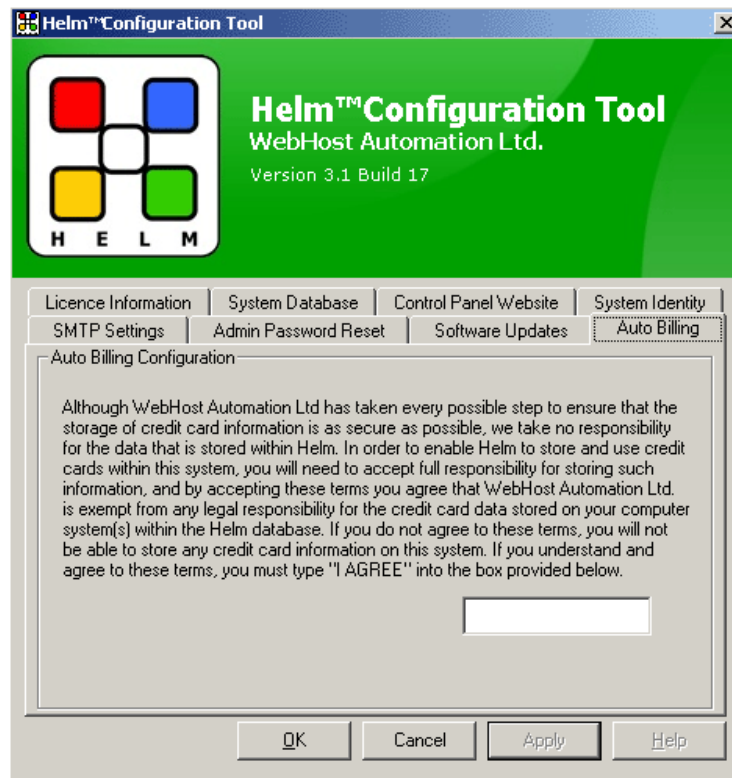
BILLING SETTINGS AND CARD PAYMENTS	3
a) Terms and conditions for Storing Card Details.....	3
b) Current Supported Online Payment Gateways.....	4
c) Authorize.Net Integration	6
d) Adding cards to Authorize.Net	8

Billing Settings and Card Payments

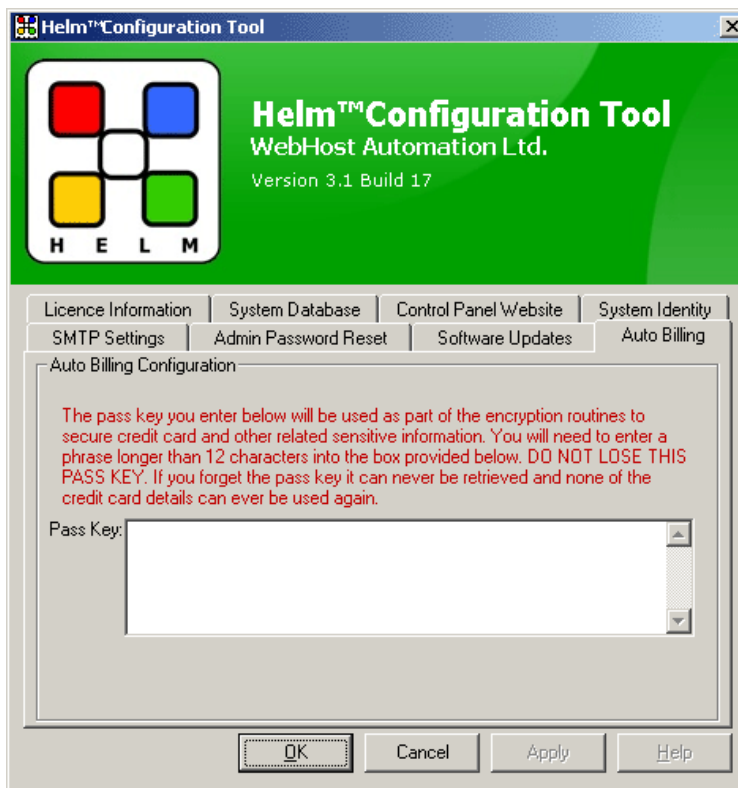
a) Terms and conditions for Storing Card Details

The latest version of Helm supports auto-billing, which allows you to store and charge your customers' credit and debit cards automatically, by allowing them to store their card details in the database. If you wish to use this facility, you first need to do the following:

1.) Open up the Configuration Tool and choose the "Auto Billing" tab. Read and agree to the terms and conditions, and then type **I AGREE** into the box provided, and click "Apply".



2.) You will now need to choose a passkey with which any stored card details will be encrypted. This needs to be at least 12 characters and should be memorised. **If you lose this key in future, you will not be able to recover any encrypted credit card details, should your server's registry become corrupt or lost.**



Once done, you now need to set up Helm so that it will accept your customers' card details.

b) Current Supported Online Payment Gateways

Helm supports the following online payment gateways for automated billing:

- **Authorize.Net**
- **ProTx VSP**
- **Moneris eSelect Plus**
- **LinkPoint Secure**
- **psiGate Gateway**
- **eWay EPayment**
- **SecurePay (USA)**
- **E-xact Transactions**
- **Velocity Pay**
- **psiGateXML Gateway**

To set one or all of these up for your reseller to use, go to:

Home > Billing > Billing Settings

Billing Settings Menu

This is the main billing settings menu. From this location you can access all settings that affect billing.

Reseller, Reseller (SAMPLE_RESELLER)
User Account: SAMPLE_RESELLER
 Enable Billing System
Back Save

Billing Configuration Tax Settings Invoicing Payment Receipts Payment Gateways
Payment Reminders Credit Card Failure Notification

Choose "Payment Gateways" from this screen. Now, select the payment gateway you wish to enable from the Automatic Recurring Billing Gateways list, and click "Next".

Automatic Recurring Billing Gateways
Online Payment Gateway: ProTx VSP
Back Next
ProTx VSP
Authorize.Net AIM
LinkPoint Secure
Moneris eSelect Plus
psiGate Gateway
eWay EPayment
SecurePay (USA)
E-xact Transactions
Velocity
psiGateXML Gateway
Show QuickHelp
3.2.9

Below are the setup instructions for E-xact Transactions.

c) E-xact Transactions Integration

This guide assumes that you have installed the necessary files (where appropriate) to use the E-xact Transactions gateway. If such files are required, these should have been provided to you by the gateway directly. Your gateway will have told you if the installation of such files is needed. If you have not done this, you should contact the billing gateway directly.

Below is the Payment Gateway Settings page for E-xact Transactions, which you will need to customise as appropriate:

Automatic Recurring Billing Gateways

Online Payment Gateway: E-xact Transactions

Enabled:

CC Failure Retry Limit:

Payment Description:

E-xact Login Id:

E-xact Login Password:

E-xact DLL Path:

Auto EPN:

User Static IP:

Primary IP for E-xact Transaction Server:

Primary Port:

Secondary IP for E-xact Transaction Server:

Secondary Port:

Enabled:- Check this box in order to make this gateway available for your resellers to use.

CC Failure Retry Limit:- The number of times (after the initial attempt) that Helm will try and pay the gateway. For instance, if this is set to 3 then Helm will attempt to contact the gateway a total of 4 times.

Payment Description:- The description that your resellers will see for this gateway. One useful feature here is if you put the variable [CreditCardName] into the payment description, Helm will replace this variable with the "friendly" name of the user's card. E.g. you could put "Payment by [CreditCardName]" in this field.

E-xact Login Id:- The login Id provided to you by E-xact.

E-xact Password:- The password for logging in to your E-xact account.

E-xact DLL Path:- The path to the E-xact DLL installed on your server. You will get sent this DLL when you sign up for a E-xact account. The path to this file can be altered as necessary to wherever you have installed it.

Auto EPN:- This is E-xact's automated IP lookup to get to their payment servers. This is set to "False" by default and means that this system won't be used, and instead the IPs specified in the Primary and Secondary IP boxes will be used. Unless the E-xact server IPs change, then this can be left as False. If set as False, make sure that the Static IP dropdown is set to "True".

Use Static IP:- This is set to "True" by default in conjunction with the Auto EPN field above. If set to True, it will use the IPs and ports specified in the Primary and Secondary fields.

Primary IP for E-xact Transaction Server:- The Primary IP that the E-xact Transaction server is set on. This doesn't need to be changed by default.

Primary Port:- The Primary Port that the E-xact Transaction server listens on. This doesn't need to be changed by default.

Secondary IP for E-xact Transaction Server:- The Secondary IP that the E-xact Transaction server is set on. This doesn't need to be changed by default.

Secondary Port:- The Secondary Port that the E-xact Transaction server listens on. This doesn't need to be changed by default.

d) Adding cards to E-xact Transactions

Credit/Debit Cards Supported by E-xact Transactions:

- Visa
- Mastercard
- American Express
- Diners Club
- JCB
- Discover

On the Payment Gateway Settings screen, you will see that it currently displays "There are no credit card types assigned to this gateway". Click Add New to add one:

Add Card Type


You can use the form below to allow a card type to be assigned to the online payment gateway so that customers may use that particular type of card when making purchases. A card type can only be assigned to a single gateway at any one time.


Online Payment Gateway: E-xact Transactions

Card Type:
 Visa ▼

Visa



 Mastercard
 American Express
 Diners Club
 JCB
 Discover


 Back

 Save 

Choose a card from the dropdown menu and click Save. This will get added to the supported cards that your resellers can pay with. Repeat this action for as many cards as you wish to support:

Assigned Card Types

Card Type
<div style="display: flex; align-items: center;">  Visa </div>
<div style="display: flex; align-items: center;">  Mastercard </div>

Add New 

To remove any cards from a gateway, simply select them from the list, then in the new screen choose "Delete". Once completed, click "Back" to return to the Payment Gateway Settings page.

Configuration of the E-xact Transactions gateway is now complete.