



psiGate Gateway Configuration Guide

How to integrate the psiGate automated billing gateway into Helm

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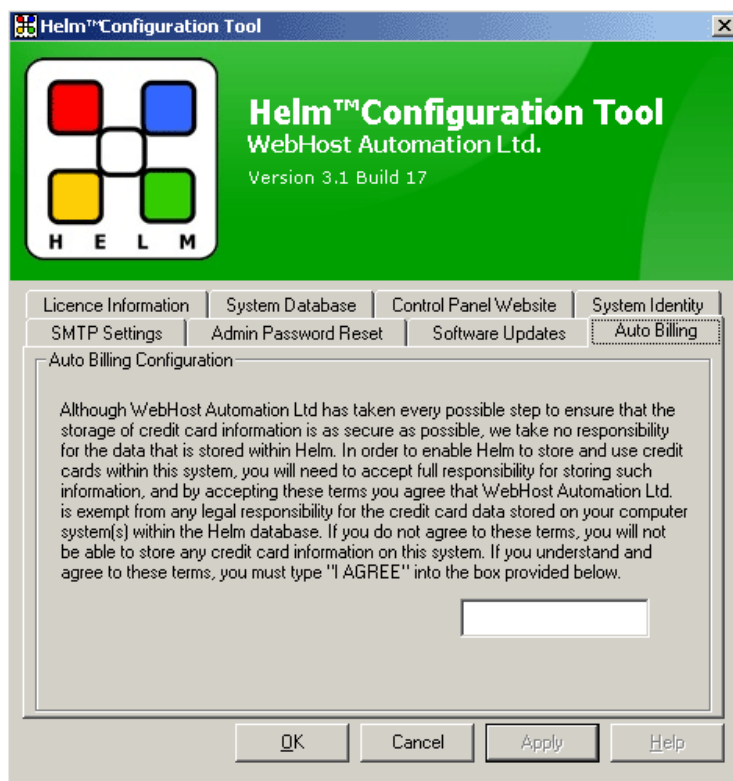
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Billing Settings and Card Payments

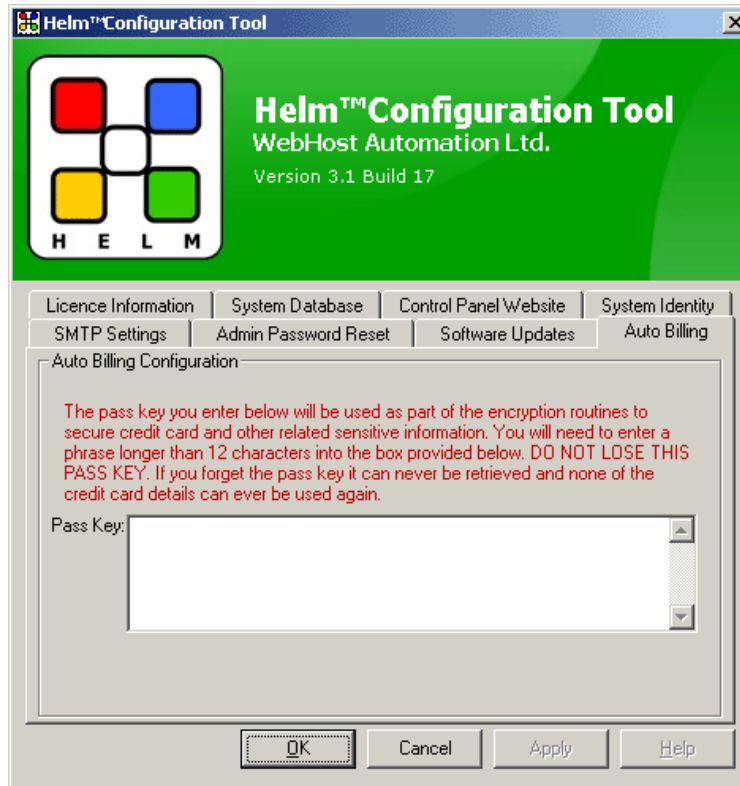
a) Terms and conditions for Storing Card Details

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.

The screenshot shows the 'Billing Settings Menu' for a reseller named 'SAMPLE_RESELLER'. The user account is 'SAMPLE_RESELLER' and the 'Enable Billing System' checkbox is checked. There are 'Back' and 'Save' buttons. Below the header are seven icons representing different settings: Billing Configuration, Tax Settings, Invoicing, Payment Receipts, Payment Gateways, Payment Reminders, and 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".

The screenshot shows the 'Automatic Recurring Billing Gateways' selection screen. The 'Online Payment Gateway' dropdown menu is open, showing a list of options: ProTx VSP, Authorize.Net AIM, LinkPoint Secure, Moneris eSelect Plus, psiGate Gateway, eWay EPayment, SecurePay (USA), E-xact Transactions, Velocity, and psiGateXML Gateway. The 'psiGate Gateway' option is highlighted. There are 'Back' and 'Next' buttons, and a 'Show QuickHelp' link. The version number '3.2.9' is visible at the bottom right.

Below are the setup instructions for psiGate.

c) psiGate Integration

This guide assumes that you have installed the necessary files (where appropriate) to use the psiGate 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 psiGate, which you will need to customise as appropriate:

The screenshot shows a configuration window titled "Automatic Recurring Billing Gateways". It contains the following fields and controls:

- Online Payment Gateway:** psiGate Gateway
- Enabled:**
- CC Failure Retry Limit:**
- Payment Description:**
- psiGate DLL Path:**
- psiGate Store Number:**
- psiGate Certificate Path:**
- psiGate Store URL:**
- psiGate Store Port:**

At the bottom, there are two buttons: "Back" (with a left arrow) and "Save" (with a right arrow).

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.

psiGate DLL Path:- The location of the psiGate DLL file. You will get sent this DLL when you sign up for a psiGate account. The path to this file can be altered as necessary to wherever you wish.

psiGate Store Number:- This will be provided to you by psiGate.

psiGate Certificate Path:- This certificate will be provided to you by psiGate. In here, you need to type the physical path to the certificate on your server.

psiGate Store URL:- This is the URL that psiGate's store is located at (leave as default).

psiGate Store Port:- This is the port that psiGate's store uses (leave as default).

Once you have entered the relevant details, click the “Save” button to save them. You now need to choose which credit/debit cards you will accept to use with this gateway.

d) Adding cards to psiGate

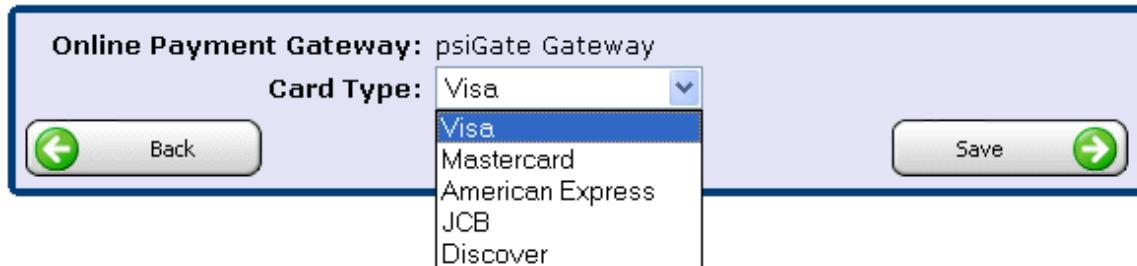
Credit/Debit Cards Supported by psiGate:

- Visa
- Mastercard
- American Express
- 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.

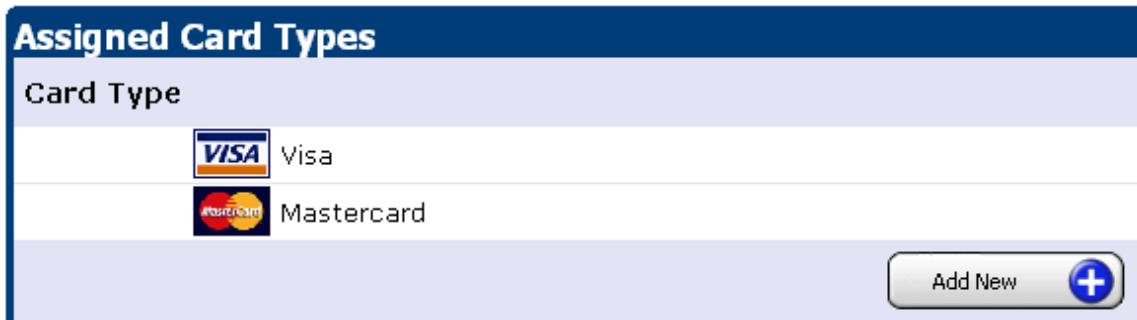


Online Payment Gateway: psiGate Gateway



Card Type:


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 |
|--|
|  Visa |
|  Mastercard |

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 psiGate gateway is now complete.