

# Methodology

## QuickClick

### Button Types

- Shopping Cart Button: Will connect products built with this button type so customers can add several products to the cart system. Also supports Recurring Billing.
- Fixed Price Button: Does not connect to the 'Shopping Cart' system and will only process one item at a time.
- Donation/Payment Button: Allows the customer to enter an amount and checkout.

### Adding Buttons to Your Site

#### HTML

QuickClick buttons can be added to your website using an HTML form. This form can be created using our Button Generator or using the values found in the 'Variables' section. The form should use the "POST" method and the action should be <https://secure.planetauthorizegateway.com/cart/cart.php>.

#### Link Alternative

Some websites do not allow for entry of HTML, and can sometimes act finicky. If this is the case with your website, you have the option of using the Link Alternative which can be pasted on your website as a link. The only way to create this link is by using the Button Generator.

Please note that use of this link will nullify any shopping cart product options or text input (amount) fields as these options appear alongside the HTML button.

#### IFrame Support

Please note that QuickClick is NOT supported via iframes as there are documented browser bugs (notably in Safari) that do not allow the user to view QuickClick due to Safari's documented blocking of third party cookies.

## Customization

### QuickClick

You will need to have the Administrative Options permission set in order to access QuickClick settings. These can be found by clicking on the QuickClick link under Settings(the link, not in Integration).

### Look and Feel

## Choose a Profile

In order to choose a pre-existing profile, select 'Make Default' to the right of the profile name. If there is no 'Make Default' link, the profile is already set.

## Add New Profile

1. Name the profile (no spaces).
2. Choose the colors of the Text, Form fields, Form Headers, Required Fields/Errors, and Background. If you do not see the HEX value desired, you can input any web friendly HEX value into the fields provided.
3. Enter in one of the following: a Direct Link to an image file (ex: `http://www.mywebsite.com/images/logo.png`) or a direct link to an HTML/PHP file that contains a header with the same look of the Merchant Website. (ex: `http://www.mywebsite.com/header.html`)
4. Within Header Text, you can paste a style sheet HTML string like so: `<link rel="stylesheet" href="http://www.mywebsite.com/css/style.css" />` and QuickClick will use that style sheet to make the form look like forms on the Merchant website.
5. You may use a Footer file as well to round out the page, but do NOT enter the same style sheet link into the footer text field.
6. Click Save. This will bring you back to the Look and Feel page, and you will see your new profile in the list. To make it active, click 'Make Default'.

## Customer Information

While field names can not be altered, fields that are not required can be hidden if not needed. Here, you will see a list of all available QuickClick fields.

- It is recommended to choose 'Required' for the Card Security Code.
- You may choose 'Hidden' for any other fields not wanted/needed.
- If you have created any Merchant Defined Fields and want them visible on the Form, please make them 'Optional' or 'Required' at the bottom of the list as they are Hidden by default.
- Click 'Save' at the bottom of the page when you are done.

## Payment Methods

This is where you can decide which payment methods (Credit Card, Electronic Check) will be accepted by QuickClick.

## Security

QuickClick 'Verification' involves a hashing so that malicious users are unable to alter the button HTML. This can be turned on and off using this interface. If you do not wish to use Verification you must uncheck 'Require that all values be verified using a security key'. This will associate your Buttons with your GATEWAY USERNAME.

Please advise that buttons can become void if a username is ever deleted from the Gateway. Using Verification eliminates this possibility.

QuickClick also has the option of requiring your customers to enter a CAPTCHA entry in order to process. This makes it more difficult for fraudsters to use your button for fraud using a bot or brute force tool. This can be disabled and enabled using this interface.

## **Tax**

In order to set tax, choose the State from the drop-down, and enter the percentage Tax Rate in the field to the right. When you click 'Save', QuickClick will automatically calculate Tax based on the State entered into the Billing Address form when checking out. Tax will NOT appear until this occurs. This setting is specific to the Shopping Cart Button and does not apply to Fixed Price or Donation Buttons.

## **Shipping**

Rather than charging shipping on a 'per item basis' most merchants prefer to use the Shipping threshold module. The threshold is based off of dollar amount. For example, the very first threshold should be below the lowest priced item -- it's suggested to use .01 as the first threshold, and then set both the domestic and international rate. It is not possible to exclude the International field from this threshold.

For example: if you want to offer free shipping on purchases over \$100.00, enter shipping threshold as such:

### **Threshold Domestic International**

100.00    0.00    0.00

You can also choose specific shipping types and mark them up by percentages (including 0% if necessary). For example, if 'Ground' is checked, and a 15% markup entered, QuickClick will use the Threshold table and add 15% to the total Shipping dependent on the total amount in the cart. As an example:

Shipping Threshold is 50.00 @ 15.00 Domestic. If I, as the customer, buy 53.00 of product and choose Ground Shipping, my total shipping cost will now be \$17.25.

## **Convenience Fee/Surcharging Configuration**

The Gateway supports a Convenience Fee/Surcharge feature which can be used with QuickClick. To change these settings, please navigate to 'Settings'->'Convenience Fee/Surcharging Configuration' and activate the option, set the fixed and percentages and the Default Type and click 'Save'.

Once those are saved, the Default Surcharge Type for QuickClick can be set.

## **Button Generator Fields**

### **QuickClick**

# Shopping Cart Button

## Product Information

- **Item Description:** This is the description a customer will see in their Cart. A detailed, but not lengthy, description of the item should be typed here.
- **Item ID (SKU):** This is the SKU or Unique ID for that product. This can also be a SKU associated with a Recurring Plan. If this isn't a recurring charge, do not enter a Plan SKU in this field.
- **Item Price:** Enter the price of the item in this field without including any currency symbols. (ex: 10.00)
- **Shopping Cart Language:** There is the option of having the cart display in English or Spanish. Choose accordingly.
- **'Quantity' checkbox:** This option is a little unclear. If you check this box, a field will display on the Merchant's website. If you do not, the customer will be able to change the quantity when on the cart page.

## URLs

- **Cancel URL:** Enter a Fully Qualified URL to direct customers to should they wish to empty their cart and exit the system. (ex: <http://www.mywebsite.com/cancel-purchase>).
- **Continue URL:** Enter a Fully Qualified URL to direct customers back to the merchant's website to add more product. Typically merchants prefer this link to be that of their shop page. (ex: <http://www.mywebsite.com/shop>)
- **Finish URL:** Enter a Fully Qualified URL to send customers to after they've successfully checked out. Typically merchants prefer a thank you page. (ex: <http://www.mywebsite.com/thank-you>) or something similar.

## Shipping Amount

- If you want to charge shipping on a PER ITEM basis, use this field. If not, leave it blank. This field will not accept a 0.00 entry.

## Product Options

You are not required to use these, but they are helpful if the product has variations or special features. These fields appear alongside the button itself, and NOT within the actual cart system.

An example of the use of these fields would be sizes (Small, Medium, Large, etc.) and/or colors (Blue, Red, Yellow, etc.). Some developers even use these to customize monogrammed items. Here is an example of both:

- **Size Variation**
  - Option Name: Size
  - Field Type: Dropdown Menu
  - Option Choices: (Enter each option and hit 'enter' after, so they are stacked.)
    - Small
    - Medium
    - Large
- **Text Entry Option**
  - Option Name: Custom Monogram

- Field Type: Text Entry
- Option Choices: \*Leave Blank\*

## Key Verification

It is strongly recommended that you always select a key and not 'No Verification'. This protects the button HTML and prohibits malicious users from altering the code.

## Fixed Price Button

### Product Information

- Item Description: This is the description a customer will see in their Cart. A detailed, but not lengthy, description of the item should be typed here.
- Item Price: Enter the price of the item in this field without including any currency symbols. (ex: 10.00)
- Shopping Cart Language: There is the option of having the cart display in English or Spanish. Choose accordingly.

### URLs

- Finish URL: Enter a Fully Qualified URL to send customers to after they've successfully checked out. Typically merchants prefer a thank you page. (ex: <http://www.mywebsite.com/thank-you>) or something similar.

## Key Verification

It is strongly recommended that you always select a key and not 'No Verification'. This protects the button HTML and prohibits malicious users from altering the code.

Note: This button does not support shipping and/or tax options.

## Donation Button

### Product Information

- Item Description: This is the description a customer will see in their Cart. A detailed, but not lengthy, description of the item should be typed here.
- Shopping Cart Language: There is the option of having the cart display in English or Spanish. Choose accordingly.

### URLs

- Finish URL: Enter a Fully Qualified URL to send customers to after they've successfully checked out. Typically merchants prefer a thank you page. (ex: <http://www.mywebsite.com/thank-you>) or something similar.

## Key Verification

It is strongly recommended that you always select a key and not 'No Verification'. This protects the button HTML and prohibits malicious users from altering the code.

Note: This button can also be used for Bill Pay. Once the button has been generated, you can change the button text from 'Donate' to 'Pay Now' or your desired text by altering this line of code:

```
<input type="submit" name="submit" value="Donate" />
```

# Variables QuickClick

## All Buttons

Name	Value: Description
action	show_cart: Displays the customer's shopping cart. process_cart: Adds one or more products to the customer's cart. process_variable: This processes a variable amount transaction. During the checkout process, the cardholder is given the ability to specify the amount. This is useful for donations. process_fixed: This processes a fixed amount, single item transaction. This is basically a "Buy Now" type transaction. The customer is not able to specify an amount during checkout.
username	Specifies a merchant username. Either this or a key_id is required. Using a key_id method is the preferred.
key_id	Specifies a development key id. Either this or username is required, this method is preferred.
hash	The hash field is used to pass a verification hash. By using a verification hash, you can ensure that no one will be able to pass an unauthorized price, SKU, shipping price, or tax information.
product_taxable_#	Controls whether the product will be affected by the tax rates configured in your QuickClick tax options. Set this to '0' or 'false' to ensure that a customer doesn't get charged taxes on a product/service. The default is true.'
order_description	Specifies a description for the product.
currency	Applies to USD and CAD currencies only. The currency is included with the hash, so it will need to be hashed outside of the button generator, or hashing will need to be turned off.
language	Specifies the language to be used for the cart and checkout webpages. Current valid values are 'en' for English and 'es' for Spanish.

url_finish	Specifies a page that the customer should be sent to after finishing their order. This page will receive several pieces of information concerning the completed order. If you have some programming knowledge, you can have your page process and store this information. The information can be useful for order fulfillment, amongst other things. Please ensure URLs are fully qualified (example: http://www.example.com).
return_link	Used in place of url_finish in order to skip the QuickClick receipt page. Value should be the url to your own receipt/thank you page.
return_method	Used to skip the QuickClick receipt page. Value should equal "redirect"
profile	Specify the profile the button should use.
customer_receipt	Specifies whether to email the customer a receipt after their transaction is complete. If multiple customer email receipts exist, the name of the desired receipt can be passed as the value, otherwise 'true' should be passed.
merchant_receipt_email	Specifies a list of email addresses to send merchant receipts to. Our system will send merchant receipts to all of the specified recipients in addition to any users that are configured to receive transaction receipts in the Merchant Control Panel. If there are multiple recipients, separate them with a comma. You can also set this to 'false' if you do not want any merchant receipts to be send.
merchant_defined_field_#	A merchant defined field can be used to pass any type of information you'd like. For example, if you wish the user to specify their mother's maiden name, you could use a merchant defined field. This information shows up in reports and customer/merchant receipts. The # can be any number 1-20. Descriptions for the merchant defined fields can be set within the Merchant Control Panel's 'Gateway Options'.
shipping_same	Indicates whether the shipping information is the same as the billing information. The default setting is 1 (true). Set this to 0 to always ask the customer for separate shipping information. If you plan on passing other shipping_ parameters (i.e. shipping_first_name), ensure that you set this to 0. For additional options regarding the Shipping Address, examine the QuickClick Customer Information Options in your Merchant Control Panel.
first_name	The customer's first name.
last_name	The customer's last name.
address_1	The first part of the customer's street address.
address_2	The second part of the customer's street address.
city	The customer's city.
company	A company name.
postal_code	The customer's postal (zip) code.
state	If they're in the US, this should be the customer's 2 letter state code. Otherwise, this can be used to pass a province or region.
country	The customer's 2 letter country code.
phone	The customer's phone number.
fax	The customer's fax number.
website	The customer's website address.
email	The customer's email address.
shipping_first_name	The receiver's first name.

shipping_last_name	The receiver's last name.
shipping_address_1	The first part of the receiver's street address.
shipping_address_2	The second part of the receiver's street address.
shipping_city	The receiver's city.
shipping_company	A receiving company name.
shipping_postal_code	The receiver's postal (zip) code.
shipping_state	If they're in the US, this should be the receiver's 2 letter state code. Otherwise, this can be used to pass a province or region.
shipping_country	The receiver's 2 letter country code.
shipping_email	The receiver's email address.

## Fixed/Donation Buttons Only

amount Specifies the amount, in US dollars. This is used only for fixed and variable price buttons.

## Shopping Cart Buttons Only

product_description_#	Specifies a description for the given product.
product_sku_#	Specifies a SKU for a given product to uniquely identify it.
product_quantity_#	Specifies the quantity for a given product number. If this parameter isn't passed, '1' is assumed.
product_amount_#	Specifies the amount, in US dollars, for the given product.

Product options can allow your customers to make some additional choices before adding a product to their cart. For example, if you're selling a T-Shirt, you may want to allow the customer to define a size (Small, Medium, or Large) before adding the product to their cart. Up to 3 product options can be defined for a single product. The first number field is the product option number, and the last number field is the product number. For product #1, the product option field names would follow this form:

product_option_#_#	product_option_1_1 (option #1, product #1)
	product_option_2_1 (option #2, product #1)
	product_option_3_1 (option #3, product #1)

Ultimately, any option values passed in are appended to the product description. This can be very useful when fulfilling orders. If your T-Shirt was defined to have a color option and a size option, the resulting description might look like this:

T-Shirt (Red) (Large) The value can be anything you want, and you can utilize any form elements to pass it in (i.e. text, a dropdown, or radio buttons). Also note that our Button Creator is able to generate buttons with product options.



The `product_option_values` field can be used for two main purposes:

- Unless the `product_option_values` field is used, a customer would technically be able to pass any option values they want. For most merchants, this is not of great concern, but if this is a concern for you, the `product_option_values` field can be used to restrict which options can be passed in. Setting a `product_option_values` field to "Red|Green", for example, would only allow Red or Green to be passed in as options for a particular product. In this case, passing anything else would generate an error.
- The `product_option_values` field can also be used to create an option that increases the price of an item. For example, a large T-Shirt may cost slightly more than a smaller T-Shirt. Setting a `product_option_values` field to "Small|Medium:1.00|Large:2.00" would ensure that medium shirts would be charged \$1.00 more than the product's amount, large shirts would be charged \$2.00 more than the product's amount, and that small shirts would not be charged extra at all.

`product_option_values_#_#`

The `product_option_values` field's naming convention is very similar to that of the `product_option` field.

The first number field is the product option number, and the last number field is the product number. For product #1, the product option field names would follow this form:

`product_option_values_1_1` (option #1, product #1)  
`product_option_values_2_1` (option #2, product #1)  
`product_option_values_3_1` (option #3, product #1)

Specifies a set of shipping overrides for a particular product. This field allows you override shipping prices on a per-product and per-country basis. The shipping parameter overrides any settings configured in the Merchant Control Panel QuickClick Options.

### Examples

fixed|10.00

Charge \$10.00 per item for shipping.

fixed|10.00|5.00

Charge \$10.00 for the first item, and \$5.00 for each additional item.

- When shipped within Canada, charge \$15.00 for the first item, and \$10.00 for each additional item.
- When shipped elsewhere, charge \$10.00 for the first item, and \$5.00 for each additional item.

product\_shipping\_#

fixed|10.00|5.00|country:CA|15.00|10.00

url\_continue

Specifies a page that the customer should be sent to when they wish to continue shopping. This only applies to shopping cart buttons. Please ensure URLs are fully qualified (example: <http://www.example.com>).

url\_cancel

Specifies a page that the customer should be sent to after they cancel their order. This only applies to shopping cart buttons. Please ensure URLs are fully qualified (example: <http://www.example.com>).

checkout

When set to true, the shopping cart page is skipped and the customer is sent immediately to the customer information screen or directly to checkout. This is useful if you need to pass SKUs, but still want a 'Buy Now' feel to the checkout process.

# Testing Information

## QuickClick

### Transaction testing credentials

Transactions can be tested using one of two methods. First, transactions can be submitted to any merchant account that is in test mode. Keep in mind that if an account is in test mode, all valid credit cards will be approved but **no charges will actually be processed.**

The Payment Gateway demo account can also be used for testing at any time. Please use the following key id or username for testing with this account:

key\_id: 3785894

username: demo

### Transaction POST URL

Transaction details should be POST'ed to the following URL:

POST URL: <https://secure.planetauthorizegateway.com/cart/cart.php>

### Test Data

Transactions can be submitted using the following information:

Visa: 4111111111111111

MasterCard: 5431111111111111

Discover: 6011601160116611

American Express: 3411111111111111

Credit Card Expiration: 10/25

account (ACH): 123123123

routing (ACH): 123123123

### Triggering Errors in Test Mode

- To cause a declined message, pass an amount less than 1.00.
- To trigger a fatal error message, pass an invalid card number.

- To simulate an AVS match, pass 888 in the address1 field, 77777 for zip.
- To simulate a CVV match, pass 999 in the cvv field.

# Example Response

## QuickClick

QuickClick buttons will return a response to the 'Finish URL' using a query string which can be read in using GET. Here are the variables that will be passed back:

### Response Variables

- type
- response
- responsetext
- authcode
- avsresponse
- transactionid
- orderid
- amount
- cvvresponse
- first\_name
- last\_name
- address\_1
- address\_2
- company
- city
- state
- country
- phone
- postal\_code
- email
- ip\_address
- key\_id
- action
- product\_sku\_#
- product\_description\_#
- product\_amount\_#
- product\_shipping\_#
- url\_continue
- url\_cancel
- url\_finish
- customer\_receipt
- hash
- referrer\_url
- merchant\_defined\_field\_#

# Finish Methods

## QuickClick

Below are some examples of alternative redirect methods available when using QuickClick HTML. This functionality is not available by default through the button generator and must be added after the fact. Enhanced functionality is not available on Link Alternative URLs.

All URLs provided must be fully qualified (Example: <http://www.example.com>)

### No Return/Redirect:

If no redirection is wanted after the transaction a receipt is displayed, leave the 'Finish URL' field blank in the Button Generator or exclude url\_finish variable from button HTML.

### Standard Return/Redirect:

This displays a receipt to the customer and asks them to click 'Continue' to finalize the order.

When the customer clicks on continue, the non-sensitive transaction response data is returned via GET to the page included. This allows the Merchant's website to record a SUCCESSFUL transaction in cases where a programmer has built logic to read our response.

In the button generator, enter a fully qualified URL in the 'Finish URL' field or include url\_finish variable within the button HTML.

Example:

```
<input type="hidden" name="url_finish" value="http://www.example.com/finish.html">
```

### POST Back with No Data:

This displays a receipt to the customer and asks them to click Continue to finalize the order. When the customer clicks on continue, they are sent to the page included but the transaction data is not posted back to that page.

Useful if a return to the website is needed, but the site is not recording the transaction data. Not available through the button generator or link alternative. Code must be customized.

Example:

```
<input type="hidden" name="return_link" value="http://www.example.com/finish.html">  
<input type="hidden" name="return_method" value="post" />
```

### Skip the Gateway Receipt page:

This skips our receipt page and automatically redirects the consumer to the return link URL automatically without clicking Continue to finalize the order. The transaction data is posted back to the website as normal.

Quickclick will not display success to the customer, so the page must be built/programmed to tell the customer that the charge went through. To use this method, do not include the 'url\_finish' variable within your HTML.

Example:

```
<input type="hidden" name="return_link" value="http://www.example.com/finish.htm">  
<input type="hidden" name="return_method" value="redirect" />
```