ASICOMP.COM

PayPal (Using PayFlow Pro)

Angie K - 2024-02-26 - in Credit Card Processing

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Minimum System Requirements

Win 7 or Win 10 Professional

Requires Internet access for each station processing credit cards

PayFlow Pro Software Development Kit

PayFlow Pro is the gateway solution for Verisign, which has since been merged into PayPal. Once you establish a merchant account with VeriSign/PayPal, you may then download, install, and use the PayFlow Pro application for online credit card processing in ProfitMaker.

Getting started

Please contact PayPal for assistance with the installation of their software at 1-888-883-9770.

Note: Make sure ProfitMaker is closed on the computer when the comobj is being installed. The comobj will need to be installed on each workstation that will be processing credit cards.

Company Information

Edit the Credit Authorization window to enter information required for processing credit cards through PayPal. Selecting PayPal will enable the fields that need to be setup.

- Partner – enter the partner name to be used when logging into your credit card transaction manager's website.

- User – enter the username to be used when logging into your credit card transaction manager's website.

- Login - Enter the login name to be used when signing into your credit card transaction manager's website.

- Password – Enter the password to be used when logging into your credit card transaction manager's website.

For eCommerce Gold customers, your websites will need to be on version 5.40.00 or higher.

Once you are done updating your SDK for PayPal on the webserver here is what needs changed on your sites. In each site you will go into the payment options and look for this option.

That is what it is currently set to.

You will set it to PayPal v4 or later.

Then you will go to each website's directory on the server.

There will be a file called web.config

Open that in notepad. You will find this line of code.

<add key="PAYFLOW_HOST" value="pilot-payflowpro.paypal.com" />

You will want to remove the pilot-

It will look like this when you are done.

<add key="PAYFLOW_HOST" value="payflowpro.paypal.com" />

Payment Method

Use this option under Masters/Codes -> Maintenance to Create or Edit all relative Payment Method master records in ProfitMaker. Records will need to be created for both "Manual" and "Interface" processing for each credit card type that will be accepted (MasterCard, Visa, American Express etc...). The setup of both types are similar, except for the Authorization type, Add'l approval %, and the additional security options for address and CSC validation. For the Interface type, the Additional approval % is used for the pre-authorization process only. The order value at the time of pre-authorization is increased by the percentage entered here, and that amount is sent during the pre-authorization request. Later, when the order has shipped, only the actual value of the shipment will be charged to the card. Checking the boxes for "Enable address verification service" and "Enable credit card security code" will allow you to enter additional credit card information from ProfitMaker. This information (credit card holder's name and address, and 4 digit CSC #) is not sent to PayPal unless the "Line item information" checkbox in Company Information has been checked (see the above paragraph for more information).

Setting up a Payment Method

Use this option under Masters/Codes -> Maintenance to Create or Edit all relative Payment Method master records in ProfitMaker. Records will need to be created for both "Manual" and "Interface" processing for each credit card type that will be accepted (MasterCard, Visa, American Express etc...). The setup of both types are similar, except for the Authorization type, Add'l approval %, and the additional security options for address and CSC validation. For Interface type, the Additional approval % is used for the pre-authorization process only. The order value at the time of pre-authorization is increased by the percentage entered here, and that amount is sent during the pre-authorization request. Later, when the order has shipped, only the actual value of the shipment will be charged to the card. Checking the boxes for "Enable address verification service" and "Enable credit card security code" will allow you to send additional credit card information from ProfitMaker.
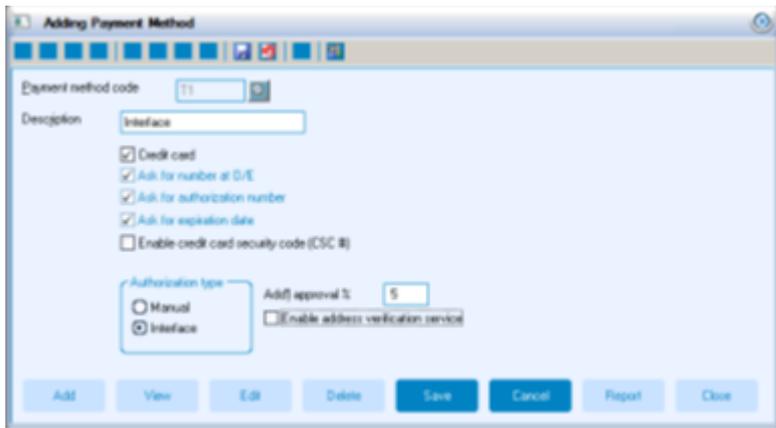
Procedure

Test by entering a sample order for an amount of 1.00 on each PC that will be processing credit cards. This will require a valid test credit card account number for processing (4111 1111 1111 1111). Currently PromoPayment, VeriSign/PayPal and USAEPay should be set to "test" mode.

Once the transaction has been processed and the operator has received notification that the transaction has been approved, load the appropriate gateway's web site to review the transaction details through their specific manager console. Once you are sure that each PC is operating and processing properly, then select to go "live" and make any required changes to "Company Information". These changes may include unchecking "Test mode" and may require a change to the identification codes used to confirm your merchant account information.

Order Processing

All order entry processes (including Fulfillment) contain a credit card processing window. For Regular orders, activate credit card processing in each order by checking "Cr card" on the Order Info tab window. Continue to process the order as normal. Once all line item details have been entered, use the "Method of Payment" button located on the Options tab window to enter credit card information. If the payment type is set up as Interface, a Pre-Authorize button will be enabled. Selecting this button will transmit order-related information to the appropriate gateway service and, if approved, the funds will be allocated against the card.
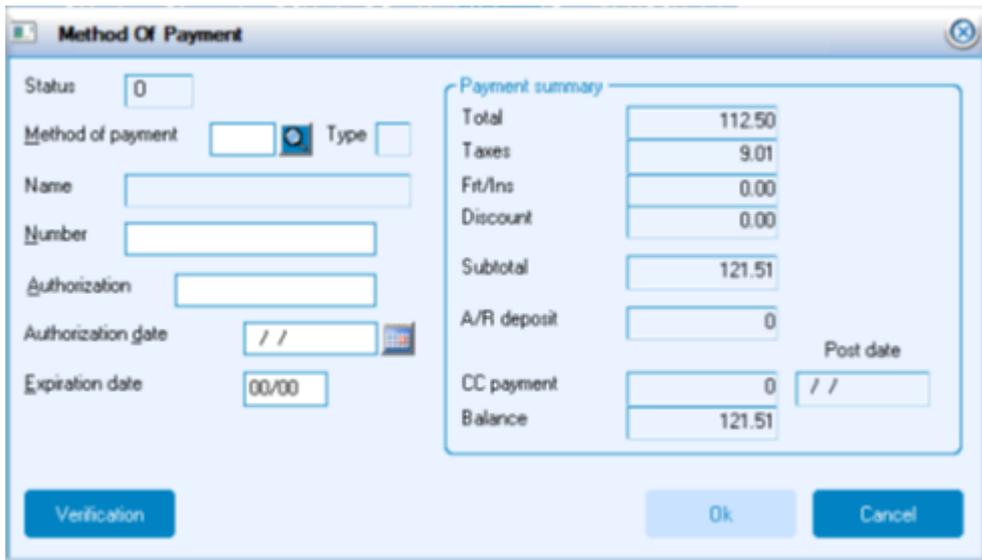
The Verification button will allow additional information to be captured on the order and transmitted to the appropriate gateway.

For Fulfillment orders, activate credit card processing by entering "CC" in the payment type field located on the Edit Summary window. This will activate the Method of payment button where credit card information is entered. If the payment type is set up as

an Interface type, the Pre-Authorize button will become enabled. Selecting this button will transmit order-related information to the appropriate gateway and, if approved, the funds will be allocated against the card.

If the selected Payment method is set up to capture additional credit card information, the Verification button will be enabled. Clicking this button will allow you to enter more information, including the cardholder's name, address, and CSC #. If the checkbox in Company Information is checked for Level 3 support, this additional information will be transmitted to PayPal.

Post Credit Card Deposit

To minimize transaction fees it is recommended by ASICS that posting of Interface orders occur after shipping. This reduces the need to issue new charges/credits against the card due
to changes that occur at billing time, such as adding freight. This application allows the ability to select credit card orders to be processed by program, order #, customer #, unit #, or payment type. This allows the ability for different operators to be in the application at the same time to handle the processing of their specific orders. Once the selections have been processed a list of the orders will be displayed. Interface orders are identified by the "*" that appears in the 2nd column of the listing of orders to be processed. Orders that have been shipped will show a status (St column) of "S" (shipped complete), "P"(shipped partial) or empty (not shipped).

To process one order at a time, select an order by double clicking or highlighting and selecting Edit. The "Pre-Authorize" button will transmit the AuthOnly request and the "PostAuthorize" button will complete the capture of the order information
and transmit the information to the appropriate gateway.

To authorize a batch of orders at once, click the Process CC button at the bottom of the Post Credit Card Deposits window. This will bring up an options window to select which orders to process. Choose Pre-Authorize to process all Interface orders waiting for a pre-authorization. Choose Post-Authorize to process all Interface orders waiting for a post-authorization. Choose to "Include backorder amount now" if you wish to authorize the card for the entire amount of the order, including backordered items. Choose "Include backorder amount later" to only authorize the card for the amounts shipping on this order, not including any backordered items. Credit memos will not be processed; they must be authorized separately. When OK is pressed, the system will go through each order and try to pre- or post-authorize the order (based on your selection). A message box will pop up for each order that is declined, stating the reason the card was declined.

An order can only be post authorized once. Any changes made

after the post authorization will require a manual transaction using the appropriate gateway manager console. Manual entries may include Voids (due to deletion of order), new transaction (for changes that may occur after "PostAuthorize") etc.

Once the order has been "PostAuthorize", the icon to the left of the order on the Post Credit Card Deposits window will turn green. When the Post button is pressed, all orders with a green status will post a cash deposit to the general ledger against the order(s). You may then print the invoice in the normal manner.

Additional information

Deleting credit card orders that have been processed through the appropriate gateway as a "PostAuthorize" will require a Manual transaction to either void or credit the transaction against the original credit card. This is done on the appropriate gateway manager console.

Settlement is performed using the appropriate gateway's manager console and should be completed at the end of each business day.