Getting the Most Out of the E-Commerce Module

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1. Table of Contents

2. Introduction

The E-Commerce module gives you a secure way of accepting customer payments on the Internet. This is mostly used for credit card payments, though you can use it for cheque and other payments as well.

This User Guide describes how to integrate the E-Commerce module into your Web site. The next chapter is an overview of the functionality, and then the following chapters are organised broadly in the order in which you would do each of the steps:

- Technical overview
- Preparing your products for selling on the Web
- Promoting your products on your Web site
- Listing the detailed product information
- Using the affiliate program
- Creating order forms
- What happens when somebody sends an order
- Testing the system
- Paying MYOB invoices

How to Get the Most from This Guide

If you're using the E-Commerce module for the first time, we recommend that you read this guide from start to finish.

If you are a more experienced user, you can dip into this document for specific things. The Table of Contents is fully hyperlinked to specific pages, and throughout the guide you'll see hyperlinks to other parts of the guide.

Two versions

There are two versions of the E-Commerce module. The first version provides the basic functionality for taking credit card orders. The second version has some additional features, such as a shopping cart and MYOB invoice payments.

If you are paying an annual licence fee for the E-Commerce module, you are already using the second version, and it includes everything described in this User Guide.

Otherwise, you are using the first version only. You can upgrade to the second version at any time, and it will give you access to the additional features. Because you are an existing client, we have a special offer if you upgrade. Please e-mail support@firststep.com.au for further information.

This guide notes any features that are available in the second version only by using the text “version 2 only”. Otherwise, you can assume that it applies to both versions.

Request Enhancements

Is there anything you would like to see added to the E-Commerce module that would make it easier for you? Please e-mail us at support@firststep.com.au with your requests.

For simple requests, we do them free of charge. Even for enhancements for which we charge a fee, we offer a discount if we think it’s something that would be generally useful for other clients.

3. Overview of Functionality

The main purpose of the E-Commerce module is to take orders from a Web site.

It includes:

- Order forms for all products on your site
- Secure server for taking credit card orders
- Postage and handling calculations for different countries
- GST calculation
- Currency converter for non-Australian customers
- Automatic creation of tax invoices
- Exporting orders to Microsoft Excel for further processing
- Immediate download of electronic products
- Help for people downloading electronic products
- Shopping cart facility (version 2 only)
- Credit card payments for MYOB invoices (version 2 only)

What it *doesn't* do for you

The E-Commerce module handles the order processing parts of your sale, but some other parts of the total customer experience are in your hands.

Before the sale

It's your responsibility to bring the customer to the point where they are ready to order, including:

- Bringing people to your Web site
- Displaying your products
- Persuading them to buy

Although these are outside the scope of the E-Commerce module, we do touch on them briefly in the chapters on preparing your products and promoting your products.

After the sale

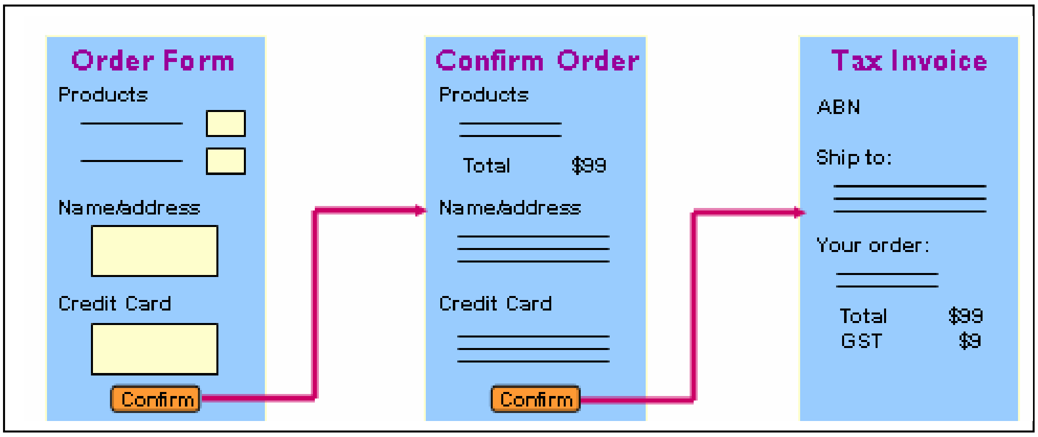
After the sale, it's also your responsibility to complete the order, including:

- Shipping the product

- Processing the credit card transaction (though there *is* an option to automate the processing of these transactions)
- Keeping in touch with customers (there is an option to automate this process as well)

What it does for you

We set up a three-step process on your Web site for the customer to place an order: Order form, confirmation page and invoice/receipt.



Order form

The customer fills in the order form, including all the information for their order (e.g. name, contact details, shipping address, quantity of each product, shipping options, credit card details).

Confirmation page

This repeats most of the information the customer entered, but also calculates the total amount of their order. So it adds up the quantities, adds the appropriate postage and handling fee and includes or excludes GST.

If the customer is ready to order, they click a "Confirm" button to confirm the order. They can also print this page and fax it or mail it to you if they don't feel comfortable sending their order over the Internet.

Invoice/receipt

The Web site displays a receipt or invoice, which the customer prints and keeps for their records. It also sends them a confirmation message by e-mail.

This step also sends you the details of their order for further processing (for example, for you to ship the product to the customer). If you accept credit card orders on the Internet, this step also processes the credit card transaction (more about this below).

Payment Options

Think about payment from your customer's point of view. If you're selling to consumers who are browsing from home with just one phone line, they can't order by phone while they are on the Internet. If you're selling to businesses, they might have specific procedures for making purchases, and many businesses can't pay by credit card.

Here are some of the payment options you can offer:

- Cash on delivery: The customer orders on-line and pays when you deliver the goods to them.
- Invoice: You enclose an invoice with the goods. Many business customers might request (or even require) this option.
- Cheque or money order: The customer prints the order form and sends it to you by mail, enclosing a cheque or money order.
- Credit card payment by phone, mail or fax: The customer pays by credit card, but not on the Internet.
- Online credit card payment: The customer pays directly over the Internet. This is a common option and we describe it in more detail below.
- eCash or eWallets: The customer has a pre-paid "wallet" of money, and uses it for payments. This is not yet common among Internet users, and is not currently supported in our E-Commerce module.
- Payment in advance: Sometimes customers pay for Internet-based products as part of another purchase. For example, if you sell a printed magazine, you could offer an option where customers can pay a small fee for access to an on-line supplement.

Online Credit Card Payments

This is the most popular form of payment for most Web sites, so we recommend that you use it on your site as well.

Broadly, you have two options for accepting payments:

- Manual processing: When the customer sends their order, you receive an e-mail message with their credit card details. You process this manually through your bank merchant account, in the same way as a telephone order.
- Automatic processing: When the customer submits their order, the E-Commerce module automatically processes the credit card transaction, so that the money is deposited in your bank account automatically. You still receive the e-mail message, of course, but you don't have to process the transaction yourself.

The automatic option sounds more appealing, of course. However, it's more expensive to set up, so many of our clients prefer to start with the manual processing option.

Bank merchant account

To accept credit card payments in your business, you need to apply to your bank to become a **credit card merchant**. This allows your customers to pay you by credit card.

You require this for both manual and automatic processing.

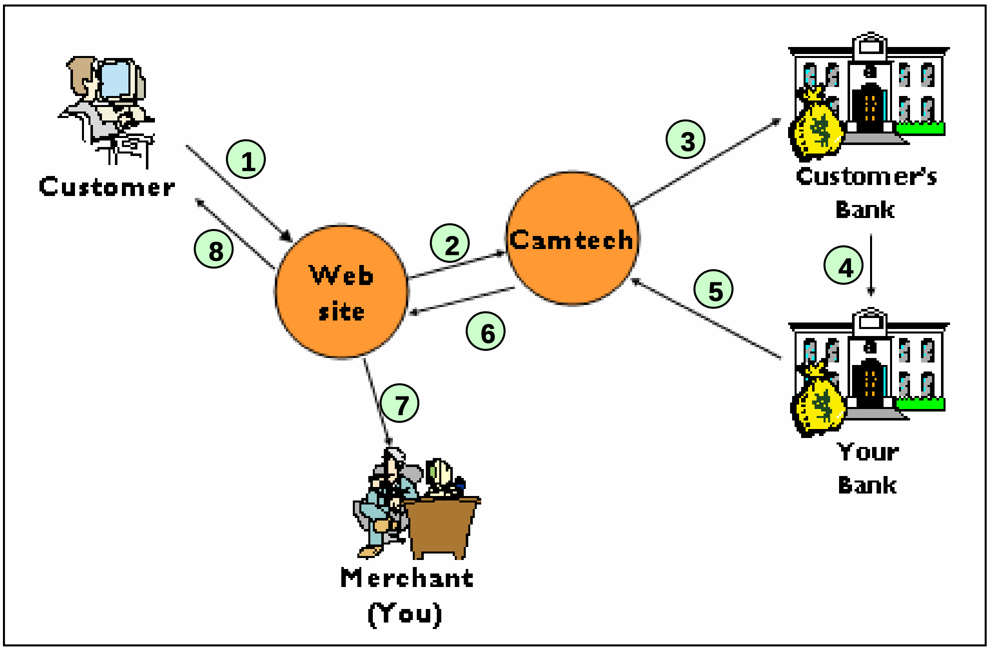
Depending on the merchant agreement you sign with your bank, you may or may not be allowed to accept telephone, mail and fax credit card orders. Be sure that your bank allows you to take Internet orders.

Payment gateway

For the automatic processing option, you also require a **payment gateway**, which takes the customer's credit card, completes the transaction and puts the money in your bank account.

We work with a company called Camtech that provides the appropriate facilities for you. Using Camtech, all your credit card transactions take place automatically on the Internet, and the money is deposited into an Australian bank account, without any intervention on your part.

Here is a diagram that illustrates the flow of information:



1. Your customer fills in the order form and clicks a button to confirm their order.
2. The E-Commerce module extracts the credit card information and the payment amount, and sends it to Camtech for processing.
3. Camtech contacts the banking network, which checks the customer's bank account to ensure the credit card is active and the account has sufficient funds for the transaction.

4. The banking network transfers money from the customer's credit card account to your merchant account.
5. The banking network replies to Camtech, confirming that the transaction is complete.
6. Camtech notifies the E-Commerce module.
7. The E-Commerce module creates a new page as a receipt and tax invoice for the customer.
8. It sends you, the merchant, an e-mail message containing the details of the order. You take whatever action is required - for example, shipping the order to them.

Camtech works with most Australian banks. All transactions are in Australian dollars.

If you would like to work with Camtech, please contact us at support@firststep.com.au and we will put you in touch with our local Camtech agents, who have integrated their system with our E-Commerce module.

4. Technical Overview

This chapter gives you a glimpse into the technical aspects of the E-Commerce module. This is an overview only, and we'll expand on it in other chapters.

Logging In

The E-Commerce module is part of the suite of interactive Web modules provided at the E-Service Web site at www.fsplugins.com.

Note: If you have an older account, it might be hosted at www.eservice.com.au instead. So if your login doesn't work at www.fsplugins.com, try www.eservice.com.au. If it *is* at www.eservice.com.au, then use this in place of fsplugins.com throughout this document.

To log in to the E-Commerce module, go to the E-Service site at and log in using your user name and password. If we designed your site for you, you might have a link to this on your administration page, or the E-Service commands might be on your administration page itself.

After logging in, you'll see a page with a list of links. The exact contents of the page depend on which E-Service modules you have bought in your account. The items relevant to the E-Commerce module are as follows:

E-Commerce Settings

These are the general settings for your overall use of the E-Commerce module. This is described in more detail below.

Price/Product List

This is the main part of the E-Commerce module. You'll find that this is the section you will use most often. It's used for adding products, creating order forms and downloading orders.

MYOB Invoices (version 2)

- List invoices
- Add invoices
- Upload from MYOB
- Add this to your Web site

The E-Commerce module allows your customers to pay their MYOB invoices by credit card. You export your current unpaid invoices from MYOB and transfer them to your Web site. A customer comes to your Web site, finds their invoice, and pays it by credit card. The payment comes through to you in the usual way (either for manual processing if you don't have a payment gateway, or it's processed automatically if you do).

Affiliate Program (version 2)

- List affiliates
- Add an affiliate
- List actual sales

An affiliate program allows other people the chance to sell products from your Web site. Your nominated affiliates refer potential customers, and earn a commission from any completed sales.

E-Commerce Settings

When we set up the E-Commerce module for you, we will initialise some settings for you. It's unlikely that you will have to change them yourself (except when testing the system). However, we'll document them here for your reference.

Click the "E-commerce settings" link to see the current settings.

Please don't change the settings, except as described here.

Gateway

If you're using a payment gateway for automatic processing of credit card payments, this specifies the gateway.

Merchant

If you have a payment gateway, this is your merchant name. If you're using PayPal, this is your PayPal e-mail address.

E-mail

This is the e-mail address to which orders are sent (usually your own address). If you would like orders sent to more than one address, you can list them here, separated by a comma.

Gateway mode

If you don't have a payment gateway, this is blank.

If you are using the Camtech payment gateway, it should be ENABLE when the system is live and blank during testing.

Password

Not in use.

ABN

This is your ABN, which will appear on your tax invoices. If you're not an Australian business, this will be blank.

Take Prices From

This determines how the E-Commerce module determines prices – either from the database or directly from the form.

In general, leave this as "Database" – it's more secure.

Special Settings

You can set various things here:

- Security Code: Tick this if you're doing manual processing of credit card transactions, and your bank requires the 3-digit security code for Visa and Mastercard orders.
- Ask for E-Mail Twice: This prompts the customer to type their e-mail address twice, and the system checks they are identical, to reduce the possibility of them mistyping it.
- Compulsory Field - Suburb (or State, Postcode, etc.): This makes these fields compulsory rather than optional, on order forms that ask for them. **Think twice before ticking these boxes** – for two reasons:
    1. People are protective of their privacy, and don't like disclosing any more information than absolutely required. Forcing them to disclose extra information might prevent them from completing the order.
    2. Some countries don't have some of these address fields (For example, Singapore doesn't have Suburb or State). So making these fields compulsory makes it difficult for people in those countries to order from you.

GST Exemption

For international clients and any others who are not required to charge Australian GST for products and services, this is the reason for GST exemption.

If you're based outside Australia, type in "Based in XXX" here, where "XXX" is your country – for example, "Based in South Africa". The system will automatically insert the default country name into your order forms.

Currency

By default, the order form shows prices in Australian dollars, and if you have the shopping cart (version 2 only), it has an optional currency converter.

Specify your currency here by listing four comma-separated items:

- The default currency symbol
- The full name of the currency (or use the word "UNSPECIFIED" to omit it)
- The three-letter abbreviation for the currency
- The three-letter abbreviation for the default conversion currency (version 2 only).

For example, to list prices in U.S. dollars, with a currency converter that defaults to South African rand, use this:

```
US$,US Dollars,USD,ZAR
```

If you're not using the shopping cart, only the first two fields are required:

```
U$,US Dollars
```

Note: If you're using the payment gateway, it only accepts orders in Australian dollars, so you cannot use another currency here.

Encryption key

This is a special security option that you probably won't require.

If set, the E-Commerce module will XOR the order e-mail with this key. It requires some software at the other end to decrypt it.

Other Payments

By default, the system allows for Visa and Mastercard only. If you accept Amex, Diners or cheque payments, tick the appropriate boxes.

Note: Cheque payments only apply to physical products. For electronic products (e.g. e-books and on-line courses), even if you tick the Cheque box, the system won't offer this as an option. That prevents scammers from choosing the Cheque option, completing the order, downloading the product, and never sending payment!

5. Preparing Products

Product development is a complex issue, and it's beyond the scope of this guide to provide detailed information. This chapter does, however, have some general guidelines for you to consider.

Physical or Electronic?

Traditional marketing has revolved around physical products – that is, things you can touch and feel.

Now, the spread of the Internet has helped to make electronic products more popular, and many businesses are considering ways of converting their physical products to electronic form.

Obviously, some products only make sense in physical form (a car, for example)! Others can be converted to electronic form, and made available either in addition to, or instead of, the physical version.

Although it's usually (relatively) easy to convert a physical product into electronic form, it's not always easy to determine whether this is a good idea.

Here are some of the differences between physical and electronic products. Keep in mind that these are *differences*, not necessarily advantages or disadvantages. Almost every one of these differences can be an advantage *and* a disadvantage, depending on how it is applied to a particular product. For example, electronic products are easier to copy. This is a disadvantage because it makes copyright violation easier; but it can also be an advantage if you sell, say, a "master copy" of a product to a company and give them permission to copy it for all their staff.

Feature	**Physical**	**Electronic**
Familiarity	Customers are more familiar with physical products	Newer and less familiar, so it takes more to convince customers to buy them. But the fact that they are newer might appeal to some customers.
Tangible	Can be held and felt, so customers might feel more reassured about getting value for money. But this also means that it's more difficult / expensive to give free samples.	Intangible, so customers have to be educated on its intrinsic value. Easier and cheaper to offer free samples.

Initial cost	Varies depending on the product	Varies depending on the product. Sometimes higher set-up costs than for physical products, but the low marginal cost (below) makes up for it.
Cost of each sale	Higher than electronic products because it does require manufacturing something	Zero or very low (e.g. only the credit card processing fee).
Inventory	Required	No inventory required
Pricing	For commodities, the price is set by competing products in the marketplace. Price can sometimes be set as a mark-up on cost.	As for physical products, the price can sometimes be set by competing products. For non-commodities, there's a wider scope for setting prices based on value rather than mark-up.
Additional costs to customer	Fulfillment costs such as postage, handling, insurance, etc. add to the total cost.	None
Delivery	Delays in shipping the product.	Can be available for immediate download.
Copying	Harder to copy.	Easy to copy, which makes it harder to enforce copyright protection. But it can be an advantage if copying is desirable.

Setting Prices

Existing products

If you're using your Web site to sell existing products, then you have set prices already for these products, so you should set the same price on your Web site.

In fact, it's often cheaper to sell the product on the Internet, so you might even offer a discount for Internet orders.

New products

If you're selling **new** products on your Web site (for example, a "subscription fee" for access to an on-line newsletter or a private section of your site), you need to determine the price.

There is no easy formula for setting the right price, and you might need to experiment to see what your customers are willing to pay.

Keep these things in mind:

- The cost of each sale (known as the "marginal cost") is probably very low, so you can afford to keep the price down. For example, sending an e-mail newsletter to a thousand customers costs no more than sending it to a hundred customers.
- Many people expect information on the Internet to be free, so you need to overcome this barrier.
- Compare your prices with similar offerings on the Internet.
- Focus on the **value** you are offering - for example, "If you make just one extra sale from the ideas in this newsletter, you will pay for your subscription twenty times over!"
- Be willing to experiment with prices.

Free Products

Sometimes you might choose to give products away – for example, a free sample, a promotional e-book or a bonus e-book. This is more common with electronic products rather than physical products, of course, because electronic products can be given away at no cost to you.

One way of giving away an electronic product like an e-book or special report is to simply add a download link on a Web page. However, you might choose to use the e-commerce system instead, so that customers have to fill in an order form before they can download it. This is useful for tracking who downloads it, for example.

For this reason, the e-commerce system allows you to **enter a price of 0 for a product.** This indicates that it's a free product, so the e-commerce system does not ask for credit card information, and uses the word "Receipt" rather than "Tax Invoice" at the end of the order.

In all other respects, though, it's treated the same way as any other product. So it can have its own order form, and can be added to a shopping cart.

Additional Fees

Postage

Try to make your postage charges as simple as possible for customers to understand - for example, one price for Australian orders and another for international orders. Don't worry about getting the postage exactly right each time

– set an “average” price. Even if this doesn’t correspond to the exact postage, it’s easier for customers to understand than offering a large list of postage options.

Depending on your business, you might also wish to offer different delivery options, such as Next Day Delivery, Air Mail, Sea Mail, and so on.

Handling fee

Even if you’re handling all the orders yourself, include a small handling fee for each order (This is often bundled together with the postage fee as “Postage and Handling”). This way, you can pay somebody else to manage your orders when you start receiving too many orders to handle yourself.

GST

Remember to charge GST on products sold to Australian customers. Some products and some sales to international customers might be GST-exempt, so check this carefully with a qualified tax accountant.

How should I cater for international orders?

If you’re catering to an international market, take some time to consider your Web site from an international customer’s viewpoint.

- Specify the currency explicitly on your Web site - for example, if you quote prices in dollars, make it clear whether you’re talking about Australian dollars, American dollars, or others.
- Include a currency converter on your Web site to help international customers determine how much your products will really cost them. The E-Commerce module includes a link to a currency converter.
- Warn international customers that they might need to pay customs duties when you ship products to their country. If you expect a lot of orders from one country, you might even choose to bear these costs yourself by reducing the total price.
- Regardless of your product pricing, international postage fees can make the total price unattractive. So keep these fees as low as possible (One of our clients even offers free postage anywhere in the world to overcome this barrier).

Creating E-Books

There is nothing special for you to prepare physical products (except to have them ready for shipping, of course). However, e-books can be downloaded immediately, so you have to make them available for download.

Create the e-book

Create your e-book as an electronic document. The most common format is a PDF file, but it can be an .exe file, Word document, Excel file, etc.

If a product consists of a number of files, consider combining them into a single ZIP file, to make it easier for the customer to download. The E-commerce module will automatically add instructions on how to download ZIP files.

Disk space for e-books

Your e-books are loaded on your own Web site, and the E-Commerce module provides links to them when customers order them.

E-books and other electronic products can take up a lot of space, so contact your Web host and ask them whether you have sufficient space. There is usually a small fee for extra space.

If you would like to get **lots** of disk space, other Web hosts might offer a more economical deal. For example, ICDSoft, at www.icdsoft.com gives you 333Mb for just US$50 per year. You don't have to move your entire site there; you can just use it for uploading your e-books and other files.

Automatic link expiry (optional)

The E-commerce module can create temporary download links that expire after 48 hours. This gives the customer a limited time to download the file, and ensures that they can't just give away the download link to other people after that time.

Note: This doesn't offer full security. Although it's a neat way to remove one possible fraud option, it certainly doesn't guarantee that your customers can't cheat you. After all, regardless of what you do, they can just e-mail the e-book to their friends! So if you do go ahead with this option, please be aware of its limitations.

Assuming you do go ahead, we have to install some software on your Web server, so please e-mail support@firststep.com.au and ask for help.

Then make sure that your e-book file names include a string of random letters and digits. For example, if the normal file name is, say, “ProfitMaking.pdf”, you could rename it as “ProfitMaking-1943.pdf”. When making the temporary link, the e-commerce system will replace that random sequence with another sequence.

Upload the e-book

Use a meaningful file name for the e-book. Use letters, numbers, underscore or hyphen in the file name, but nothing else. In particular, don't use spaces.

Then upload the file to your Web site. We recommend creating a separate folder on your site (e.g. "docs") for all your e-books.

6. Promoting Your Products

The E-Commerce module handles the customer transaction from the order form onwards. Before it gets to this stage, though, you have to do the following things on your Web site:

1. Attract people to your Web site
2. Display the products you have available
3. Persuade them to buy

A full discussion is beyond the scope of this User Guide, and we only cover the broad principles here.

For more ideas on these areas – particularly getting people to your Web site and persuading them to buy – see the e-book ***Make More Money From Your Web Site***, available from www.firststep.com.au/make-more-money.html.

Displaying Products

The biggest Internet retail sites set up sophisticated shopping cart systems for customers to order products. But this is not necessarily the best system to use for your site. To evaluate what works best for you, you need to consider:

- Do you have one, a few or many products?
- Are the products related?
- Are they aimed at different customers?

We'll help you decide the best system for your specific needs. Here are some common situations we face with our client sites.

One product

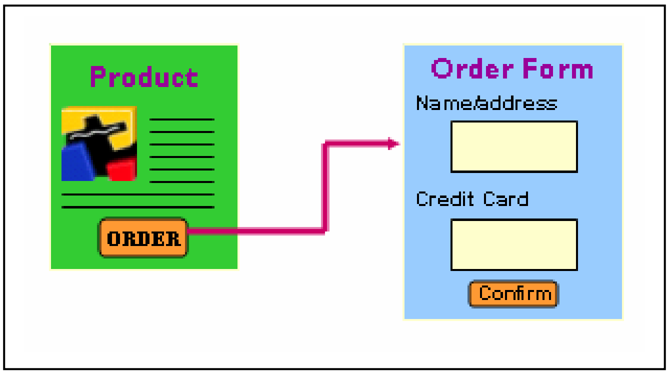
If you're only selling one product on your Web site, you can promote it with a product sales letter. This could be just one page describing the product or it could extend to many pages.

Some things you might use on the page:

- A strong headline to grab the reader's attention
- Benefits of using it
- Reasons why they should buy it from *you*
- Description of the product
- Photographs of the product
- Photographs of people using the product

- Added-value items such as free bonuses, support material, etc.
- Testimonial comments from other customers
- Free sample
- Money-back guarantee or other form of risk reversal
- Price

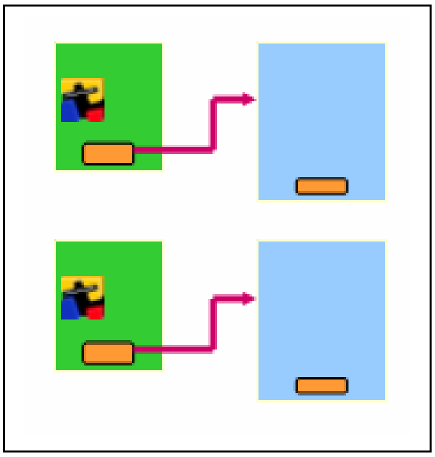
The product sales letter links through to a simple order form, which asks for the customer's contact information and credit card details. If the customer can order more than one item at a time, you also need to ask them for a quantity.



Unrelated products

Some Web sites have more than one product, but they are not related and they cater for different customers. It's unlikely that customers will order more than one product in a single order, so you treat each product as if it was the only product you are selling.

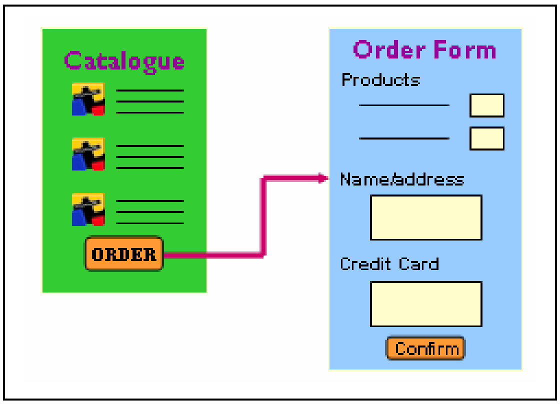
So each product has its own sales letter, and each links through to its own order form.



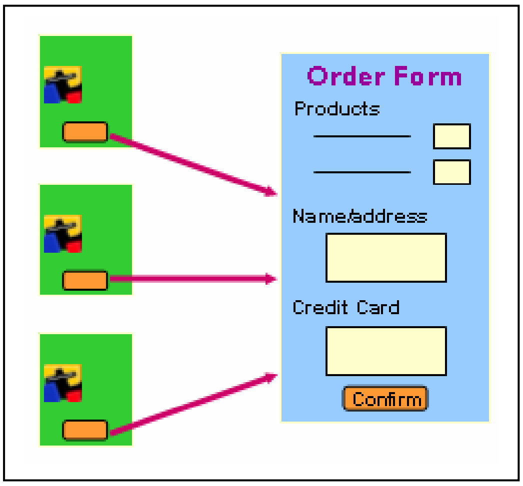
A few related products

More commonly, your Web site will sell more than one product, and you want to give customers the opportunity to buy more than one product in a single order.

The most common way of displaying your products is to list them all on the same page. This product page, which is now a catalogue rather than a sales letter, links through to a single order form for your customer to select the quantity of each product.



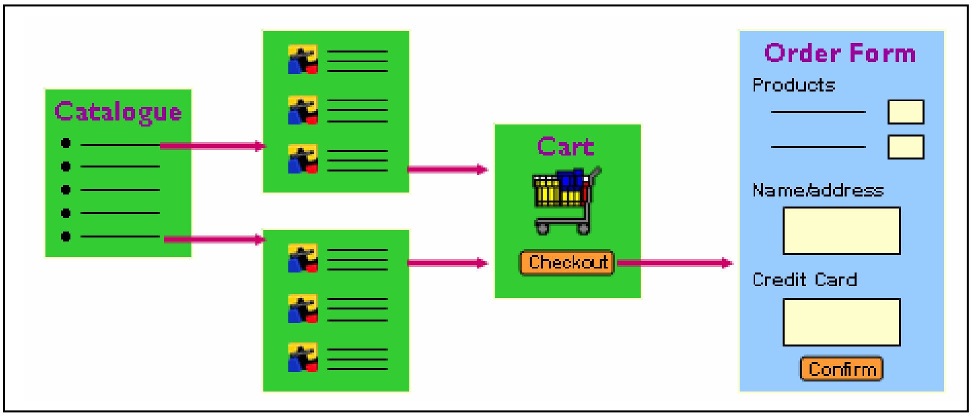
Another option is to use a separate sales letter for each product, but link them all through to a common order form. Unlike the earlier example with unrelated products, all the sales letters lead to the **same** order form, allowing a customer to order more than one product.



Many products

(version 2 only)

If you have too many products to list on one page, you can use a “shopping cart” system. Your products are set up in different categories (like aisles in a supermarket), and your customer browses each category, choosing products and adding them to a “shopping cart”. When they finish their selections, they click a “Checkout” button that displays an order form.



The advantage of the shopping cart is that it makes it easy for customers to browse a large number of products. It's ideal when you have a lot of products.

Persuading Them to Buy

To persuade customers to buy your products and services from your Web site, you need to convince them that you can deliver what you promise. In other words, you need credibility. This is true in all your sales, but especially so on the Internet, when customers don't have the reassurance of dealing with real people, real buildings and real products that they can pick up and feel.

Here are some ideas for increasing credibility and trust on your Web site.

Brand name

People buy from companies they trust, which is many of the largest companies spend millions on building their brand. If you have an established brand name, feature it prominently on your Web site.

Samples

If you can offer a free sample from your Web site, it allows them to try before they buy.

Obviously, this is easiest - and cheapest - if you're selling information-based products because you can give your samples over the Internet itself. Here are some examples:

- Software: Often sold as "shareware", where customers can download it and use it for a limited time before they need to pay for it.
- Books: Offer a chapter free on your Web site.
- Magazines and newsletters: Offer a subscription for a limited time.

But with a little creativity, you can use the same principle for other products as well.

Guarantee

If you can't offer a free sample, the next best thing is a money-back guarantee. If you can assure your customers that you're willing to offer them a full 100% no-questions-asked money-back guarantee, it reduces their risk.

If you know that you're selling a good product, you shouldn't worry about offering a guarantee. Sure, a few people might try to take advantage of you, but this is offset by the greater sales due to the guarantee. And if you find that the guarantee is really costing you much more than you can afford in returns, then you can just remove it from the site.

Testimonials

Ask past customers for their comments, and ask for permission to use them on your Web site. This helps to convince potential customers that your products and services can serve them as well.

Add strength to your testimonials by including the person's name, company name, contact details (with their permission!) and even a photograph.

Some Web sites even go to the extent of including an audio or video clip of the customer speaking their testimonial. This is a powerful tool, but remember to include the printed text as well for people who won't go to the trouble of listening to the audio and video clips.

Referrals

No amount of advertising can give your products and services as much credibility to a potential customer as a referral from a friend.

There are a number of techniques for encouraging referrals, including loyalty programs, affiliate programs and referral e-mails.

7. Listing Product Information

Many on-line order forms have a security hole because they have all the product information - including prices - stored in hidden fields. This means that hackers can copy the form, change the prices and submit it from their own Web server.

The E-Commerce module has a more secure way of handling prices. The products are stored in a database list, each with a product ID. Only the product ID appears in the order form; E-Service gets other information, such as the title, price and postage, from the prices you set in the database.

To start, log in to the E-Service site and scroll down to the section “E-Commerce Price List”:

If you have already added products, click “List items” to see them. Otherwise, add “Add an item” to add a new item.

The rest of this chapter takes you through the process of adding a new product to the list.

Product Identification

- Section: This allows you to group the products. Make up whatever sections you like; this is for your convenience only.
- Item Code: A unique code to identify this product. Use letters, digits, hyphens and underscores only for the code.
- Description: A short description of the product. This is the product title, which will appear on the order form, confirmation page and receipt. If your product has a long title, use an abbreviated form here; otherwise it won’t print on the receipt.

Price

The Price field is for the GST-inclusive price of the product. E-Service will automatically subtract GST and charge a lower price if the country is not Australia.

Specify the price here *without* any currency symbol, and E-Service will use the currency as set in the E-Commerce Settings (Or default to dollars). However, if for some reason you would like to specify a different currency, include the currency here.

Note: If you're using the payment gateway, it only accepts orders in Australian dollars, so you cannot use another currency here.

If there is any reason for changing the price for different countries, you can specify the price as a comma-separated list like this:

```
Australia,55,New Zealand,50,other,80
```

Note: "other" is a special value that applies to all other countries.

Postage

If this is a downloadable product or you offer free postage, leave this field blank.

If you offer one postage price worldwide, set the price here, without a currency symbol.

If the postage price varies between countries, you can specify prices in a comma-separated list as for Prices above:

```
Australia,5,New Zealand,9.50,other,13
```

If you require a more sophisticated way of calculating postage, please contact us at support@firststep.com.au and we can set that up for you.

Text for Receipt

After the order is complete, E-Service displays a receipt/invoice page.

You can provide specific text for each product in both of these places. For example, for downloadable products, you would provide the download links here.

Note that you can use Smart Text (see www.eservice.com.au/smart_text.html) to format the text here.

The text is only included if they order this specific product. If they order more than one product, the text for each is included. This gives you a lot of control over the output.

If you are offering any e-books, include the download link to them here, as a full URL - e.g.

```
http://www.firststep.com.au/docs/blah.pdf
```

If you're using the automatic link expiry option, as described above, put brackets around the random sequence of digits - e.g.

```
http://www.firststep.com.au/docs/blah-(9313).pdf
```

Text for E-Mail Acknowledgement

After the order is complete, E-Service also sends the customer an e-mail acknowledgement. You can customise the text in this message.

This is similar to the text on the receipt. You can provide text for each product, and if they order more than one product, the text for each is included.

Order Form

This is for customised layout of the single-product order forms (see below). Ignore it if you only have multiple-product order forms or if you are happy with the default order form.

You can customise the order form by adding some text to the top of the page or the bottom of the page (or both).

To add some text at the top of the page, just insert it in this field, like this:

```
Thank you for making this wise decision to purchase. You won't regret it,
and even if you do, it's covered by our money-back guarantee.
```

To add it at the top *and* bottom, insert all the text in this field, with a line containing the text --FORM-- separating the top and bottom text. Like this:

```
Thank you for making this wise decision to purchase. You won't regret it,
and even if you do, it's covered by our money-back guarantee.

--FORM--

Remember that guarantee!
```

Note that you can use Smart Text (see www.eservice.com.au/smart_text.html) to format the text here.

You can customise the form in more detail by inserting text in different parts of the form. This is very rare; however, it is possible. See the "Advanced Customisation of Single-Product Order Forms" section below.

Delivery Type

Choose from the delivery types listed here.

For products that require the customer's postal address, choose one of these options:

- Physical - the typical choice for products that are shipped to the customer
- Seminar - Australian clients, use this for seminars help in Australia; other clients, use this for all seminars
- Seminar outside Australia - For Australian clients only, use this if your seminar is held outside Australia (this affects GST calculations)

- Payment - a generic choice for other products where you require the postal address

For electronic products, choose one of these options:

- Download - the typical choice for immediately downloadable products. NOTE: If the product isn't downloadable immediately, use E-Payment (below) instead.
- E-Book - a special case of Download; use this if the downloadable product is an e-book
- E-Course - ditto, for electronic courses
- E-Payment - a generic choice for other electronic payments.

The delivery type is used in the single-product order forms to determine the exact layout. For example, for electronic products the order form only asks for the user's name and e-mail address, while for physical products it also asks for their mailing address.

Quantity Choices

This is another field for single-product order forms, and applies to physical products only. It allows you to determine how you will ask the customer for the quantity that they are ordering:

- Leave it blank and the order form shows a field for the customer to type in the quantity.
- Set it to "1", and the order form doesn't give the customer an option at all - it simply assumes that they are ordering one copy.
- Set it to a range like "1-5", and it shows a drop-down list of options from 1 to 5.

Affiliate Commission

If you would like to pay your affiliates a commission on the sale of this product, type the affiliate commission here. See the next chapter for more information.

8. The Affiliate Program

The affiliate program allows you to give other people the opportunity to sell your products. Many successful Internet marketers use an affiliate program to reach markets that they cannot reach directly.

The affiliate program works this way:

- You add some special code to your Web pages so that they recognise the affiliate program.
- When you add products to the database, you nominate an affiliate commission for each product.
- You then add your affiliates to the system.
- You send each affiliate a unique link to your Web site so that you can track their referrals.
- When somebody buys from your site as a result of a referral, the system records that fact, and sends the affiliate a notification of a commission.
- Whenever you choose (for example, monthly), you send commission cheques to affiliates.

Now let's look at each of these areas in turn.

Web page code

In order to use the affiliate program, you have to add some special code to your Web pages. This is fairly easy for somebody with knowledge of HTML. However, if you don't have this knowledge, refer this to your Webmaster.

Note: If we designed your Web site, you might have this enabled already, so please contact us to check.

You don't have to add this code to every page of your site. It only has to be on the pages that your affiliates will link to. For example, you could add it to your home page and every product sales page. However, there's certainly no harm in adding to every page of your site.

There are two steps required:

1. Add these two lines to the HEAD part of the page:

```
<script language="JavaScript"
src="http://fsplugins.com/fsc_cookies.js"></script>
<script language="JavaScript"
src="http://fsplugins.com/fsc_affiliates.js"></script>
```

2. In the <body> tag of the page, add the code `onLoad="setAffiliate();"`, like this:

```
<body onLoad="setAffiliate();">
```

If the <body> tag already has an onLoad statement, you might have to extend it, like this:

```
<body onLoad="fsc_Popup(); setAffiliate();">
```

Setting commissions

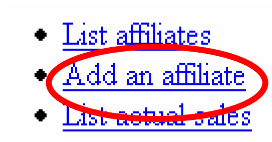
You can set an affiliate commission for each product. There are two ways of specifying the commission amount:

- A percentage amount (e.g. 50%), which is applied to the price of the product.
- OR a number without any symbol (e.g. 25), which is the dollar amount of the commission (including GST, if applicable).

For example, if a product costs $50 and you specify a commission of “10%”, the affiliate gets $5 (less GST) from the sale. If the commission is just “10”, the affiliate gets $10 (less GST).

Adding affiliates

To add an affiliate to your site, click the “Add an affiliate” link on the E-Service administration page:



Then fill in the form that appears, like this:

Affiliate ID	firststep
First Name	First
Last Name	Step
E-Mail Address	gihan@firststep.com.au
Comments	
Sample affiliate.	

The most important field is the **affiliate ID** (“firststep” in the example above), which is a unique identifier for this person. Use letters and digits only – no punctuation.

The other fields are simply their name, e-mail address and some private comments for you.

You can see your affiliates, as well as changing or deleting them, from the “List affiliates” option on the administration page:

ID	Name	E-Mail	Sales	Owing	Actions
firststep	First Step	qihan@firststep.com.au	$1.82	$1.82	Delete Copy Change
	Sample affiliate.				

Affiliate links

When affiliates refer potential customers to a page on your Web site, they add their affiliate ID to the Web address, so that the E-Commerce module can credit them with the order.

For example, if the Web page address is:

```
www.example.com/blah.html
```

an affiliate with ID “firststep” would use this address:

```
www.example.com/blah.html?aff-firststep
```

In other words, they append “?aff-“ and then their affiliate ID to the Web address.

Similarly, if they are referring people to your home page, they would use:

```
www.example.com?aff-firststep
```

Processing orders

When somebody visits your page using the affiliate’s link, the system remembers the affiliate ID. This happens even if the site visitor leaves the site and returns later (even at a later date).

When a customer makes an order, the affiliate is automatically credited with the sale, and the system records their commission payment as owing.

Note that if two affiliates refer the same person to your site, the **second** affiliate gets the credit. In other words, the commission goes to the affiliate whose referral actually leads to the sale.

You don’t have to do anything special for these orders as they occur. They simply get recorded in the system for later processing.

Processing payments

At regular intervals (we recommend at least once a month), pay your affiliates.

Start by clicking the “List actual sales” link on the administration page:

- List affiliates
- Add an affiliate
- List actual sales

You can then choose various options on the next page:

Common Options

- Show all unpaid commissions
- Show amount owing to each affiliate
- Export all sales

- List affiliates
- Add an affiliates

The most useful option at this stage is the “Show all unpaid commissions” option, which lists all the amounts owing, with a total for each affiliate:

Affiliate Sales

ADMIN

Date	Invoice	Product	Sale Amount	GST	Commission	Pay
First Step (fsc2) test@firststep.com.au						
23-Jul-2005	WEB001595	STP-08: Make More Sales	$67.00	Yes	$26.36	☐
TOTAL:			**$67.00**		**$26.36**	☐
First Step (fsc) test@firststep.com.au						
13-Jun-2005	WEB001509	cd-ebooks: Write Profitable E-Books	$127.00	Yes	$45.45	☐
TOTAL:			**$127.00**		**$45.45**	☐

Mark Checked Items as Paid

Make your payments to the affiliates using your normal banking system (that is, by cheque, PayPal or other means). Then tick the “Pay” checkboxes in the right-hand column and click the “Make Checked Items as Paid” button:

Affiliate Sales

ADMIN

Date	Invoice	Product	Sale Amount	GST	Commission	Pay
First Step (fsc2) test@firststep.com.au						
23-Jul-2005	WEB001595	STP-08: Make More Sales	$67.00	Yes	$26.36	☐
TOTAL:			**$67.00**		**$26.36**	☐
First Step (fsc) test@firststep.com.au						
13-Jun-2005	WEB001509	cd-ebooks: Write Profitable E-Books	$127.00	Yes	$45.45	☐
TOTAL:			**$127.00**		**$45.45**	☐

Mark Checked Items as Paid

After you mark these as paid, they will no longer appear in the list of unpaid commissions.

9. Order Forms

The E-Commerce module supports three different styles of “order form”:

- Single-product order form - each product has its own order form.
- Multiple-product order form – all of your products listed on the same form
- Shopping cart – customers pick and choose products, which are then listed on a multiple-product order form (version 2 only)

If you’re not sure which is the best option for you, re-read the section on displaying products.

Single-product order form

This is the simplest option, because the order form is created for you automatically.

First create the product in the price list, as described above. Then, when you're looking at the list of products, you'll see an "ORDER FORM" link next to each product. Click that and it will show you the secure order form for that product, which is generated automatically.

Cut and paste that Web address into your sales page, and that is the link to the order form.

Advanced Customisation

This is for customised layout of the single-product order forms.

This is an advanced topic, and you might choose to pay us to do it for you. If so, e-mail support@firststep.com.au.

Assuming you've decided to do it yourself, here are the instructions ...

Note first that you customise the order forms one at a time. Those that you don't customise will continue to use the default order form.

Basic layout

If you're going to customise the form in any way, start by copying this and pasting it into the "Text for Order Form" field for this product:

```
--ORDER-HEADER–

--FORM-HEADER–

--ORDER--

--CONTACT-DETAILS--

--PAYMENT--

--FORM-FOOTER--
```

```
--ORDER-FOOTER–
```

Inserting things into the form

Each of the lines above is substituted with some text that is generated automatically.

You can now insert your own text in between these lines.

Here's what is generated automatically for each line:

- ORDER-HEADER: Brief instructions to the user to fill in the order form, including a link to the currency converter.
- FORM-HEADER: The start of the order form itself. This is not visible; however, it has some hidden information.
- ORDER: The price and quantity fields.
- CONTACT-DETAILS: The start of a table, followed by the fields for the customer's contact details. If you'd like to ask for more contact information (e.g. phone, fax), add your fields after this line.
- PAYMENT: The credit card payment fields.
- FORM-FOOTER: An instruction for the customer to click the confirm button to continue, the confirm button itself, and the end of the order form.
- ORDER-FOOTER: Instructions on faxing their order or paying by cheque.

Changing the text

Sometimes it's necessary to change the text rather than simply inserting some new text around it.

You can do this with a pair of lines with the format --BEGIN BLAH-- and --END BLAH--, where "BLAH" is one of the codes listed above (ORDER-HEADER, FORM-HEADER, etc.). This replaces the default text entirely ith your own text.

This replacement text, together with its pair of lines, can appear anywhere. We recommend that you put it at the very top for convenience.

For example, to replace the text at the top of the form (ORDER-HEADER), you can do this:

```
--BEGIN ORDER-HEADER--

Fill in the form below and click the button to submit your order.

Your order is covered by our 100% money-back guarantee.

--END ORDER-HEADER--
```

Notes:

- Remember that this completely replaces the original text, so if that original text contained useful things (e.g. hidden fields or other HTML tags), it's important that you include them in your new text.
- Even if you do this replacement, you still require the line --ORDER-HEADER-- to tell E-Service where to insert the new text.

Other substitutions

In addition to using the BEGIN/END method to re-define the text codes listed above, you can also use it for these things:

- COUNTRY: The input field for the country. By default, this is a text field with the default value of "Australia". You can change it to, say, a drop-down list of countries.
- DELIVERY: The text that describes how the product is delivered. The default is "pack and deliver your order." for physical products, "enrol you in the course." for courses, "you can then download the e-book immediately." for e-books and "you can then download the product immediately." for others.
- EMAIL: The e-mail address where the orders are sent. By default, this is the e-mail address in the E-Commerce Settings in E-Service, and that is usually correct. However, you can use this to redirect e-mail to a different address for just this product.

There are a few other substitutions that you can make. However, they are of a highly technical nature, and are usually only done by First Step staff. We just mention them here in case you notice that we have done them for your products. If we have, please ask us (e-mail support@firststep.com.au) before changing them.

Multiple-product order form

This is available only if you have the E-Service Pages module.

As part of our set-up of the E-Commerce module, we'll create a default order form for you. You can edit this, or use it as a working model for creating new order forms.

Setting up order forms is an advanced feature, so if you're planning to create new order forms and get stuck with the instructions below, please contact support@firststep.com.au for assistance.

If you're only planning to edit the products on the existing order form, you only have to read the section about Products below.

Initial Template

Log in to the administration area and choose "View pages" from Web Pages, then edit one of the blank pages.

If you have just one order form, name the page `order.html` and give it the title "Order Form". Otherwise choose different names for each order form.

Copy the following code and paste it into the page.

```
<form name=order method=post action="SECURE:order_form.pl"
onSubmit="order.sendit.disabled=true;return true">
<input type=hidden name=account value="blah">
<input type=hidden name="invoice" value="WEB">
<input type=hidden name="export" value="Orders">
<input type=hidden name=form value="products">
<input type=hidden name=action value="confirm">

--- Your Order ---

Amounts are in Australian dollars. If you are ordering from
somewhere else, you can use
<a href="http://www.xe.com/ucc" target="_blank">this currency converter</a>
to convert the amount into your local currency.

<table border=0 cellpadding=5>
<tr><th>Title</th><th>Price</th><th>Quantity</th></tr>
PRODUCT Book-Secrets
SEMINAR Course-Public-Speaking 15-Aug-2003
</table>

PRODUCT-COUNT
--- Contact Information ---

<table border=0 cellpadding=5>
<tr valign=top><th align=left>First Name:</th>
<td><input type=text name="f_first_name"></td></tr>
<tr valign=top><th align=left>Last Name:</th>
<td><input type=text name="f_last_name"></td></tr>
<tr valign=top><th align=left>Your Address:</th>
<td><input type=text name="f_address" size=40></td></tr>
<tr valign=top><th align=left>City:</th>
<td><input type=text name="f_city" size=40></td></tr>
<tr valign=top><th align=left>State:</th>
<td><input type=text name="f_state"></td></tr>
<tr valign=top><th align=left>Postcode/ZIP:</th>
<td><input type=text name="f_postcode"></td></tr>
<tr valign=top><th align=left>Country:</th>
<td><input type=text name="f_country"></td></tr>
<tr valign=top><th align=left>E-mail address:</th>
<td><input type=text name="f_email" size=40></td></tr>
</table>

--- Payment ---

<input type=radio name="Payment Method" value=cheque> I will send a cheque
in the post

OR

<input type=radio name="Payment Method" value="credit card" selected> I am
paying on-line by credit card (fill in details below)

<table border=0 cellpadding=5>
<tr valign=top><th align=left>Name on credit card:</th>
  <td align=left><input name="f_card_name" type=text size=30>
</td></tr>
<tr valign=top><th align=left>Card type:</th>
```

```
    <td><select name="f_card_type">
      <option value="">Select one
      <option>Visa
      <option>Mastercard
      <option>Bankcard
      <option>Amex
      <option>Diners
  </select>
  </td></tr>
  <tr valign=top><th align=left>Card number:</th>
    <td align=left><input name="f_card_number" type=text size=20>
  <br>Amex ID (if applicable): <input name="Amex ID" type=text size=4>
  </td></tr>
  <tr valign=top><th align=left>Expiry date (MM/YY):</th>
    <td align=left><input name="f_card_expiry" type=text size=6>
  </td></tr>
  </table>

  --- Comments or Special Instructions ---

  <textarea name="Comments" rows=5 cols=40>
  </textarea>

  Click the **Confirm Order** button to process your order.

    <input type=submit name=sendit value="Confirm Order">
    <input type=reset value="Clear Form">
  </form>
```

The rest of this section describes how to modify the text that you've inserted.

Account

Set the hidden field account to the E-Service account name.

Invoice Numbers

The value of the hidden field `invoice` is the prefix for the automatically generated invoice numbers. The default is "WEB", so invoices are numbered WEB0001, WEB0002, WEB0003, etc.

To use a different prefix, change this field.

If you have more than one order form, it's OK to use the same prefix on more than one of them. Or you can use different prefixes if you prefer.

Export Information

You can tell the Web site to save information from the order on the site itself. This can be exported later (using the "Download orders" option on the administration page) and imported into Excel and other software.

The hidden field `export` is the name of the "file" for saving the order information. You can use different values for different order forms.

If you use the same value on two forms, they must have exactly the same fields in exactly the same order - otherwise you won't be able to tell which fields correspond to which values.

Action

By default, the hidden field `action` is set to “confirm”, which means that the next page will be a confirmation page, and the customer will then be required to click another button to send their order.

This intermediate confirmation page is useful when there are some calculations involved, such as calculating quantities, deducting discounts and adding postage.

On the other hand, if it’s a very simple order form without any calculations, you can choose to bypass this intermediate step. In this case, set the value of this field to “confirmed” instead.

Products

The next section lists the products themselves. The sample template shows two sample products, one a physical product and the other a seminar. You can copy and paste them for your own use. Each product must have a corresponding item in the Prices database, and it’s the product code that is listed in the order form.

E-Service uses this information to create a row in the order form showing the product name, postage options, price and a quantity field.

Each product line corresponds to a row in an HTML table. Note that you have to provide the opening `<table>` tag, the row of column headings, and the closing `</table>` tag, as in the sample template.

E-Service is smart enough to extract the product information from the Prices database and to show it in the order form.

Contact Details

The next section is for the customer contact details.

If the products are delivered electronically, you can choose to remove all the mailing information. In this case, add this line:

```
<input type=hidden name="f_no_address" value=1>
```

Payment

The next section is for payments.

- Credit cards only: Delete the Payment Method radio buttons.
- Cheques only: Delete the radio buttons and replace them with a single hidden field:

  ```
  <input type=hidden name="Payment Method" value="cheque">
  ```

- Both: Leave it as is.

If you do accept credit cards, check that the list of credit cards matches what you accept. Delete any non-accepted cards from the drop-down list, and if you don’t accept Amex, delete the Amex ID field.

Additional Input Fields

To ask the customer for other information (for example, how they found the Web site), add any additional fields you like, as long as the field names start with a capital letter, like this:

```
<input type=text name="How Found?”>
```

These can be fields of any type (e.g. drop-down lists, text, radio buttons). The script passes them all the way through to the final e-mail that’s sent to you.

This shows two sample products, one a physical product and the other a seminar. You can copy and paste them for your own use. Each product must have a corresponding item in the price list, and it's the product code that is listed in the order form.

Link to the order form

To link to the order form from your Web site, click the page title in the list of pages and it will open in a new window. Cut and paste the Web address into your sales page.

Shopping Cart

To use the shopping cart, you insert “Add to Cart” and “View Cart” buttons to every product page. The E-Commerce module makes this easy for you.

First create the product in the price list, as described above. Then, when you're looking at the list of products, you'll see a "SHOPPING CART" link next to each product. Click that and it will give you some HTML to copy. Cut and paste that HTML into your sales page for that product.

Every product has slightly different HTML code, so repeat this process for all the products on your site.

10. Order processing

If you have completed all the steps above, you now have fully working e-commerce facilities on your Web site. Congratulations!

This chapter describes what happens after the customer sends an order.

What the customer gets

When a customer completes an order from your Web site, the system creates a tax invoice for them, which they can print and keep for their records.

If you have specified any receipt text for the product (for example, downloading instructions for electronic products), that is also shown on the receipt.

If they are downloading any documents, the system automatically displays some instructions to help them with the download. If the download includes PDF documents or ZIP files, the instructions also tell the customer how to obtain the appropriate software for reading the files.

If you have specified any acknowledgement e-mail, that is sent to the customer.

If you have specified automatic follow-ups (see below), they are initiated automatically and will happen at the intervals of your choice.

What you get

Every order is also e-mailed to you for further processing.

If it's a physical order, it's up to you to fulfill it by packing and shipping the product to the customer. This also applies to electronic products that require some manual intervention on your part (for example, signing people up to electronic courses).

If you are using a payment gateway system, the customer's credit card transaction has been processed already, so it's not necessary to take any further action. If you're not using such a system, then it's up to you to process this credit card transaction, using your existing merchant facility.

For security reasons, we recommend that you do *not* keep customer credit card information in electronic form. After you process the transaction, print the e-mail message, delete the original e-mail, and keep the printed copy for your records.

Transaction records

In addition to e-mailing the orders to you, the system also stores them in a file on the E-Service Web site, in a “comma separated value” format. This format makes it easy for you to download and import into programs such as Microsoft Excel.

To download orders, click “Download orders” on the administration page. This will give you a page with further instructions.

Automatic Follow-Ups

If you have the E-Service CourseBot module, you also have a powerful tool for sending follow-up e-mail messages to customers who have bought a product. For example, you could send a thank-you message three days after the purchase, a check-up message a week later, a special offer on another product a month later, an anniversary offer a year later, and so on.

(If you don't have the CourseBot system, please contact sales@firststep.com.au to find out more about it. It's a very powerful tool, not just for your product sales, but also for on-line training, e-mail newsletters, and other regular e-mail follow-ups).

The way this works is that whenever somebody orders a product, the e-commerce system automatically enrols them in a course named WEB-ORDERS-BLAH, where "BLAH" is the product code (that is, the item code you created in the price list). If this course doesn't exist, it is created automatically.

So if you would like to send follow-up e-mails, simply program this course in exactly the same way as any other course in CourseBot.

11. Testing the System

You can – and should – test your e-commerce system before customers start using it. It's easier to find and fix problems now than waiting for them to happen with real customers.

We recommend that whenever you add a new product, test your system by sending through a test order for that product. This process is described here.

Creating the Test Environment

You can set up a temporary test environment for conducting your tests. This allows you to bypass any payment gateway, use a dummy credit card number and send the confirmation e-mail to a different address.

Setting up a test environment is optional. You can, of course, just send through your test order using the live system, and that *is* the most thorough test you can perform. However, it's sometimes more convenient to set up the test environment so that you don't have to do things like, say, refunding yourself money.

To start, log in to the E-Service site and scroll down to the E-Commerce Settings link.

This page controls various settings in your e-commerce system. **Please only change the settings as described here, and leave everything else as is.**

Bypassing the payment gateway

If you're using the Camtech payment gateway, the Gateway, Merchant and Gateway Mode fields will be set. The simplest way to bypass the gateway is to **set the Gateway Mode field to blank**.

E-Mail Address

Check the e-mail address here. This is the address where the confirmation e-mail is sent. If it's already set to your e-mail address, that's OK. Otherwise, make a note of the current setting and then change it to your address temporarily.

Conducting the Tests

You can now conduct the test by sending through an order from your Web site. We recommend that you perform the steps as closely as possible to a real customer. In other words:

- Start from the home page of your Web site.
- Click through to the appropriate product.
- Click through to the shopping cart or order form.

- Complete the order form using your own name and contact details. For the credit card number, you can use the dummy number 4242 4242 4242 4242.
- When the order is complete, check your receipt carefully. If there are any links here, click them and ensure that they work correctly.
- If there are any files to download, download them.
- Print the receipt to ensure that it prints correctly.
- Check your e-mail for the customer's confirmation e-mail and review it carefully. Again, check any links and download instructions.
- Check your e-mail for the confirmation e-mail that you receive as the merchant. Ensure that it contains the correct information.

Testing the affiliate program (version 2 only)

If you're using the affiliate program, test it as follows:

- Set up the affiliate program as described earlier.
- Add yourself as an affiliate, then use your own affiliate link to purchase a product.
- Check that you're notified of the commission.

Reverting to Live Environment

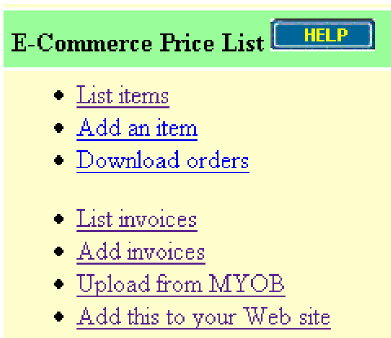
After doing all your tests, revert to the live environment by reversing any of the steps you took in creating the test environment above.

12. MYOB Invoice Payments

The E-Commerce module allows your customers to pay their MYOB invoices by credit card. This is a Version 2 feature only.

You export your current unpaid invoices from MYOB and transfer them to your Web site. A customer comes to your Web site, finds their invoice, and pays it by credit card. The payment comes through to you in the usual way (either for manual processing if you don't have a payment gateway, or it's processed automatically if you do), and you record this in MYOB.

You'll find the administration commands for invoices on your main E-Service administration page:



Typically, you would use them in this sequence:

1. Use the "Upload from MYOB" option to transfer your current invoices to the Web site.
2. Use "Add this to your Web site" to add the invoice payment feature to your Web site.
3. Regularly use "Upload from MYOB" to synchronise the Web site with the MYOB data.

The "List invoices" option shows you which invoices are currently recorded in the system.

The "Add invoices" option allows you to add an invoice manually. If you are regularly uploading from MYOB, it's unlikely that you will ever use this option. However, it's available for special cases when you would like to add an invoice to the system manually.

Uploading invoices

Click the "Upload from MYOB" option to start uploading. Follow the instructions on this page to prepare and upload your MYOB data. The bottom part of this page has clear instructions, including screen snapshots, to guide you through the process.

You will use this option regularly to bring the Web site into line with your MYOB records. Every time you upload your MYOB data, the system wipes out any existing invoices in the system. In other words, MYOB is considered to be the “master” version, and the system always brings itself in line with the latest MYOB data that you upload.

Add to your Web site

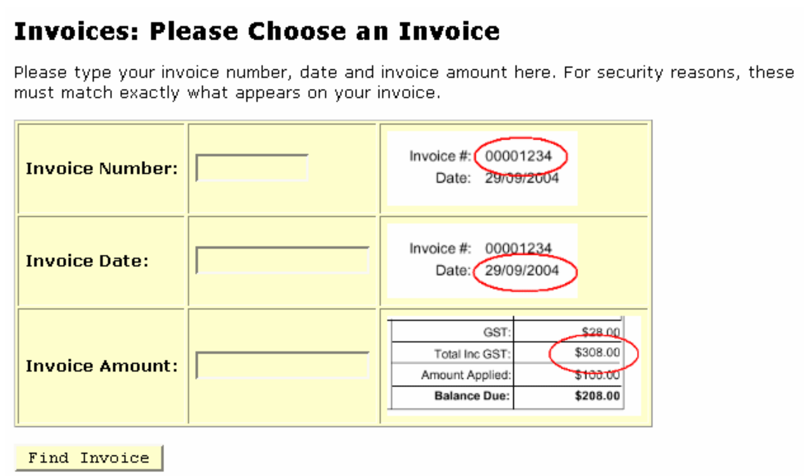
Click the “Add this to your Web site” option for instructions on adding invoice payments to your Web site.

Most businesses that allow on-line payments – such as power companies, telephone companies, and government departments – put a prominent “Online Payments” link on their home page, and we suggest that you do the same. Alternatively, if this doesn’t suit the overall style of your Web site, you can make the link less prominent.

Of course, you also have to notify your clients that they can now pay their invoices on-line. We suggest that you include this information on the invoice itself, and refer them to your Web site.

Processing payments

When a client visits your Web site to pay an invoice, they first see this page:


Invoices: Please Choose an Invoice

Please type your invoice number, date and invoice amount here. For security reasons, these must match exactly what appears on your invoice.

Invoice Number:		Invoice #: 00001234 Date: 29/09/2004
Invoice Date:		Invoice #: 00001234 Date: 29/09/2004
Invoice Amount:		GST: $28.00 Total Inc GST: $308.00 Amount Applied: $100.00 Balance Due: $208.00

Find Invoice

As you can see, they are required to type in the invoice number, date and amount. If the system cannot find an invoice matching all three things, it will not allow the client to proceed. This ensures the security of your system, and prevents hackers or casual users from seeing your clients’ invoices.

Provided the client does type in a valid sequence, they are taken to the payment page:

Invoices: Payment Details

Invoice:	198 (Joe Bloggs)
Date:	5/08/2004
Amount Owing:	$80
Amount You Are Paying:	$ 80
Name on card:	
Card type:	Select one
Card number:	
	Amex ID (if applicable):
Expiry date MM/YY:	

Make Payment

They now fill in this page, including the amount they are paying (by default, this is set to the entire amount owing, but they can choose a lesser amount) and their credit card details.

They then click the Make Payment button, which processes their payment and displays a receipt:

Thank You For Your Payment

Thank you for your payment. You can print this page and keep it as a receipt.

RECEIPT

Receipt Number: 198

ABN 91 094 652 794

Date/Time: Fri Feb 25 16:01:41 2005
Name : Joe Bloggs

Your Order

TOTAL: $80
Paid by Visa

It also sends a receipt to you by e-mail:

```
From: gihan@firststep.com.au
To: gihan@firststep.com.au
Subject: Invoice Payment #198

Transaction Ref          : local
------------------------------------------------------------
E-Mail Address           : gihan@firststep.com.au
Name on Card             : test
Card Type                : Visa
Card Number              : [redacted]
Expiry Date              : 12/05
REFERENCE NUMBER         : 198
Credit Card Payment only: 1
Description              : Invoice #198 (Joe Bloggs)
Invoice Number           : 198
Invoice Date             : 5/08/2004
Invoice Customer         : Joe Bloggs
------------------------------------------------------------

       --- TOTAL COST $80 ---
```

When you receive this message, it's important that you **process this payment in MYOB,** as if you had received their payment in some other way. This ensures that your version of MYOB is updated with the correct payment information.

The system does keep track of payments, and won't allow a client to pay more than the total amount owing on an invoice.

Processing payments yourself

There might be times when you would like to process a payment yourself. For example, if a client faxes you their credit card details, you can process the payment through the system in exactly the same way that a client would do it on-line.