

Feature Overview & Tutorial

PAYMENT FORM HTML EDITOR

Create Forms Using The HTML Editor

Overview

Payment Form HTML Editor

As **PCI Compliance Standards** for merchants grows stricter, more and more merchants are turning to the gateway-hosted payment form to guarantee **PCI Compliant security**.

Our **Hosted Payment Form** has always had customizable parameters such as background color and merchant logo. Now with our upgraded **Payment Form HTML Editor** merchants have complete control over the exact HTML that constructs their **Hosted Payment Form** and **Receipt**.

- Easy to implement and secure
- Little development is required
- Option to write your own HTML form from scratch or use our tools to create your form
- Customize form to match the look and feel of your business

Introduction:

PAYMENT FORM HTML EDITOR

Using The HTML Editor

Payment Form HTML Editor

What is the Payment Form HTML Editor?

The **Payment Form HTML Editor** gives you access to the HTML code that constructs the actual payment form and receipt. You can make changes to the standard form HTML we provide you with, use our tools to create your own form, or write your payment form from scratch. The next few slides will walk you through the basics of the **HTML Editor**.

Quick Overview

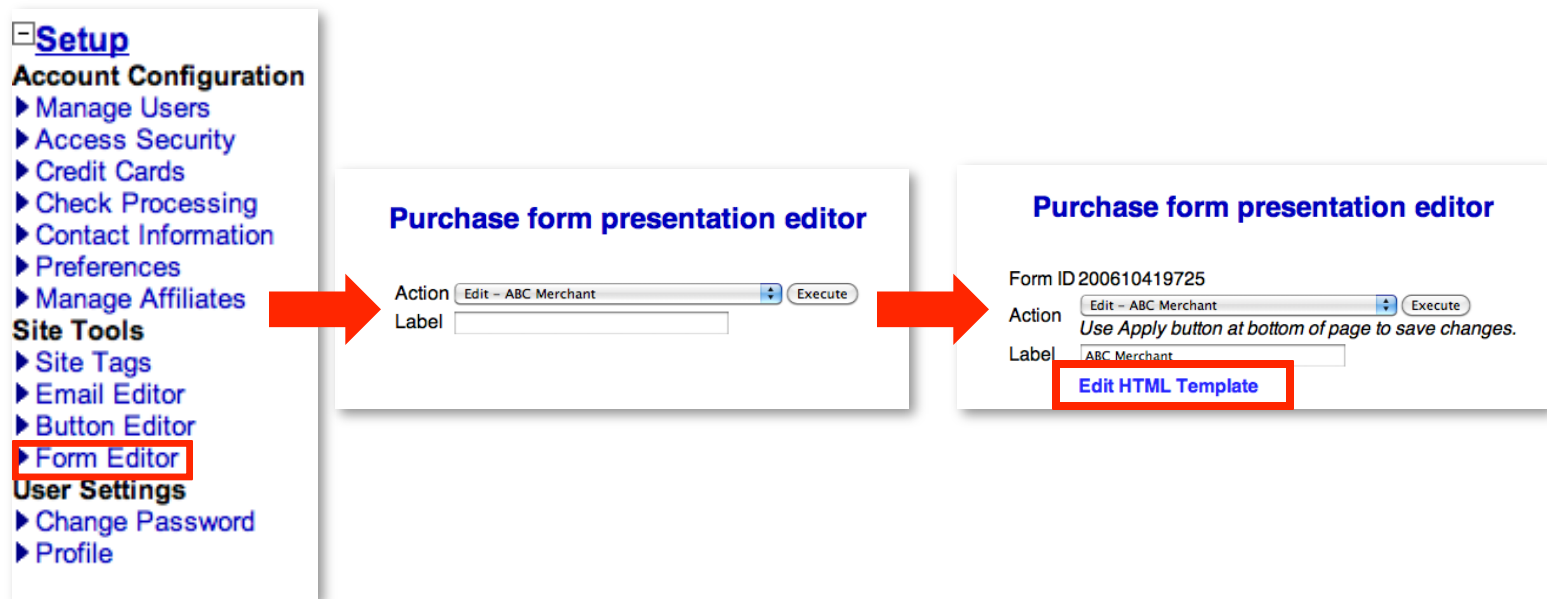
- How to Get to the Payment Form HTML Editor (Slide 5)
- The Payment Form HTML Template Simplified (Slide 6)
- Parsing Report (Slide 7)
- Supported Custom HTML Fields (Slide 8)
- Running a Test (Slide 9)
- Customizing the Form (Slide 10)
- Adding Custom Images (Slide 11)

Payment Form HTML Editor

Getting Started

On the navigation menu, follow this path to get to the **Payment Form HTML Editor**: Setup > Site Tools > **Form Editor**. You will then select the form you wish to edit or copy from the drop down menu next to “Action.” If you are making a copy, you will have to name the form in the “Label” field. Once you have selected the form you want, click “Execute.”

On the next page, you will see “Edit HTML Template,” click the link to access the **Payment Form HTML Editor**.



Payment Form HTML Editor

The Payment Form HTML Template Simplified

Edit payment form HTML template

Payment form HTML parameters

Payment form ID	200610419725
Payment form Name	ABC Merchant
Currently editing the	FORM Switch to RCPT instead
Be sure to check out the	Documentation

Form HTML 500,000 bytes max

```
<html style="min-height:100%">
<head>
<default name=stylesheet>
<title>Online Payment Form</title>
</head>
<default name=body>
<table border=0 cellspacing=0 cellpadding=0 width="100%" height="100%" class=page_table>
<tr><td align=center>
<br>
<var name=logo_img>
<p>
<var name=message>
<table cellpadding=0 cellspacing=0 border=0 class=payment_table>
<tr><td colspan=2 align=center>
<table border=0 cellpadding=10 cellspacing=0><tr><td align=left>
<!--#if expr="accept_cards" -->
<!--#if expr="show_card_number" -->
<!--#if expr="is_auth_only_form" -->
<h3>This form validates your credit card</h3><b>Your card will NOT be charged.</b>
<p>An authorization (no charge) of <var name=currency>
<var name=total_amount> will be performed to verify your card.</p>
<!--#else -->
<h3>This form allows you to pay by credit card</h3>
<!--#endif -->
<!--#endif -->
<!--#elif expr="accept_checks" -->
<!--#if expr="show_bank_account_number" -->
<h3>This form allows you to pay by check</h3>
<!--#endif -->
<!--#endif -->
```

Payment Form Name
This can be changed using the Label field in the Form Editor

Form HTML
Here you can edit the provided HTML for the payment form

Currently Editing
This allows you to switch back and forth between the HTML for the payment form and the receipt

Reload Last Saved
This will abandon any changes you made and load the most recently saved template

Load Default
This will load the default standard payment form template with no customizations. To confirm this, click "Apply"

Apply
Always be sure to hit 'Apply' after making changes to the template, or they will not save

Test
Get a preview of the finished product, always be sure to click "Apply" before testing

(Note: You must Apply before Testing)

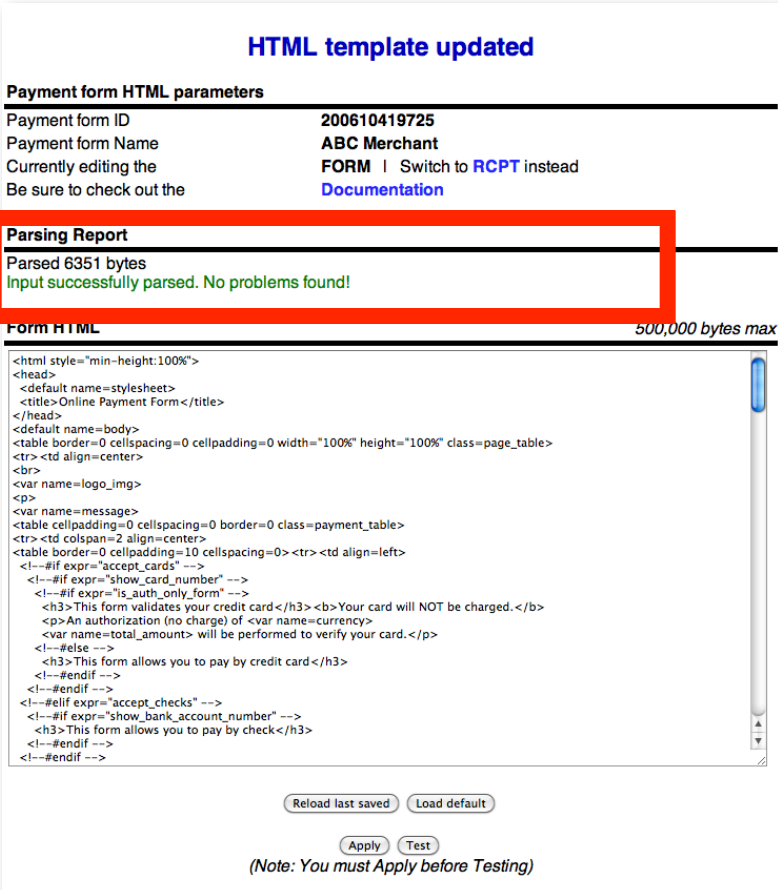
Payment Form HTML Editor

Parsing Report

Every time you click “Apply” a few basic checks are done on the HTML you entered. Any errors that were found will be posted in the **Parsing Report** in **red**. If an error is found, your form will not be saved.

Warnings will appear in **orange**. If only warnings were found, your form will be saved but certain elements will not appear. You should make sure to correct the HTML as needed until parsing report shows “No Problems Found” in **green**.

Note: the **Parsing Report** does not verify standards-compliant HTML, always test to make sure the page looks correct.



The screenshot displays the Payment Form HTML Editor interface. At the top, a blue header reads "HTML template updated". Below this is a section titled "Payment form HTML parameters" with the following details:

Payment form ID	200610419725
Payment form Name	ABC Merchant
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Below the parameters is a section titled "Parsing Report" which is highlighted with a red border. It contains the following text:

Parsed 6351 bytes
Input successfully parsed. No problems found!

Below the parsing report is a section titled "Form HTML" with a character count of "500,000 bytes max". The HTML code is displayed in a text area:

```
<html style="min-height:100%">
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<!--#if expr="show_bank_account_number" -->
<h3>This form allows you to pay by check</h3>
<!--#endif -->
<!--#endif -->
```

At the bottom of the editor, there are buttons for "Reload last saved", "Load default", "Apply", and "Test". A note below the buttons reads: "(Note: You must Apply before Testing)".

Payment Form HTML Editor

Supported Custom HTML Fields

Just below the **Form HTML** you will see the **Supported Custom HTML Fields** which include: Input fields, General Fields, HTML Tags and Conditional Expressions.

By clicking on the blue links along the left hand side, you can automatically insert the link in the **Form HTML** field. Make sure your cursor is exactly where you want the link to be placed before selecting your desired blue link.

Supported custom HTML fields

Click on the field name to automatically insert it at your cursor's position.

Input fields

These fields accept input from the customer visiting the payment form, such as card number and billing address.

bill_to_city	Bill To City
bill_to_country	Bill To Country
bill_to_email	Bill To Email
bill_to_first_name	Bill To First Name
bill_to_last_name	Bill To Last Name
bill_to_phone	Bill To Phone
bill_to_state	Bill To State
bill_to_street_line_1	Bill To Street
bill_to_street_line_2	Bill To Street (Line 2)
bill_to_zip	Bill To Zip Code
card_cvv2	Credit Card Verification Value (Only appears for credit card payments)

Payment Form HTML Editor

Running a Test

Now that you are familiar with the **Payment Form HTML Editor**, let's run a quick test so you can see what the standard form looks like. You will notice that this form looks identical to our built-in payment form but is generated entirely from the HTML code in the **Form HTML** field.

Edit payment form HTML template

Payment form HTML parameters

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  <!--#if expr="show_bank_account_number" -->
    <h3>This form allows you to pay by check</h3>
  <!--#endif -->
  <!--#endif -->
</td></tr>
</table>
</td></tr>
</table>
</body>
</html>
```

Reload last saved | Load default

App | **Test** | Testing

(Note: You must only be Testing)

This form allows you to pay by credit card

Product and Purchase Information	Payment Options
Merchant Name: ABC Merchant	 
Description:	
Payment Amount: USD	
Credit Card Payment Information	
Credit Card Number:	
Credit Card Expiration Date:	-(Month)- -(Year)-
Billing Address Information	
First Name:	First Name:
Last Name:	Last Name:
Street:	Street:
City:	City:
State: -(Select state)-	State: -(Select state)-
Zip Code:	Zip Code:
Country: -(Country)- More	Country: -(Country)- More
Phone:	
Email:	
Miscellaneous Information	
Process	

Payment Form HTML Editor

Customizing the Form

Now let's run through an example that shows you how to customize the form. Go back to the **HTML Editor** and search for the string `name=bill_to_state` within the **Form HTML**.

Once you have found it change "State" to "Province" and be sure to click "Apply" and then "Test" again. Assuming you have the billing state configured to appear on the form, you should now see the word "Province" where it once said "State".

That's all there is to it! Following the same procedure will allow you to change any of the HTML to meet your needs.

The diagram illustrates the process of customizing an HTML form. On the left, two code snippets are shown in a box, with a red arrow pointing from the first to the second:

```
<input name=bill_to_state label="State">
```

```
<input name=bill_to_state label="Province">
```

A red arrow points from the second code snippet to a rendered form on the right. The form is titled "This form allows you to pay by credit card" and contains several sections:

- Product and Purchase Information:** Merchant Name (ABC Merchant), Description, Payment Amount (USD).
- Payment Options:** VISA and MasterCard logos.
- Credit Card Payment Information:** Credit Card Number, Credit Card Expiration Date (Month and Year dropdowns).
- Billing Address Information:** First Name, Last Name, Street, City, Province (highlighted with a red box), Zip Code, Country (dropdown with "More" button).
- Shipping Address Information (if Different):** First Name, Last Name, Street, City, State (dropdown), Zip Code, Country (dropdown with "More" button).
- Miscellaneous Information:** A large text area.

At the bottom of the form is a "Process" button.

