COLLECTING SOLUTION

Data collection form

Back Office user manual

Document version 1.7

Contents

1. HISTORY OF THE DOCUMENT

| Version	Author	Date	Comment
1.8	Lyra Collect	7/27/2020	• Additional information regarding field configuration in **Building the form**. • Additional information regarding extra info. fields in **Configuring a field**.
1.7	Lyra Collect	6/16/2020	• Additional information regarding the currency in **Building the form**. • Additional information in **Uploading the form**. • Additional information in **Adding a field**.
1.6	Lyra Collect	2/25/2020	• Chapter reorganization. • Additional information in **Configuring the form**. • Addition of the chapter **Editing a form in production**.
1.5	Lyra Collect	7/10/2019	• **Customizing the form**: update of the screenshot. • **Generating a URL**: reformulation of phrases. • **Sending the form to the buyer**: update of the title.
1.4	Lyra Collect	4/3/2019	Update of the document title.
1.3	Lyra Collect	10/1/2018	Initial version

2. PRESENTATION OF THE SERVICE

The payment gateway provides its clients with the **Data collection form** service.

This solution is destined to merchants who do not have an e-commerce website but wish to offer their clients the opportunity to pay online.

The principle is simple:

- The payment gateway provides you with a data collection form hosting service.

  You build your data collection form by inserting as many fields as you wish with all the functionalities of a form (mandatory, optional and pre-filled fields, etc.).

- Your client uses this form to enter the amount of their transaction and personal details (first and last name, address, etc.).

- After the client has validated the form and accepted the privacy policy, they are automatically redirected to the payment page.

- The client makes an online payment.

The form can only be used with one currency.
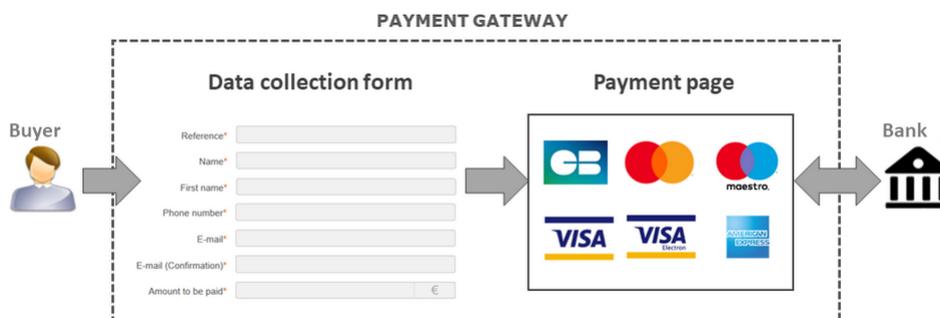
The process of implementing **Data collection form** is very simple. There is no need to have any knowledge about development or technical skills.

In order to allow your clients to pay online via the data collection form, follow these steps:

- In your Expert Back Office (to be done only the first time or if the form is updated in production)

  - Step 1: make the necessary configurations for the form.

  - Step 2: upload your form online.

  The Expert Back Office provides the URL that allows to access the form.

- Step 3: send the URL to your clients by e-mail (via your own means or using the pay by e-mail function of the Expert Back Office or via Web Services, if the function is available).

Notes

This document provides information only on configuring and using the collection form. For information on:

- *Personalizing your logo on payment pages and in buyer e-mails, see the **Shop logo customization** user manual.*

- *Managing payment orders by e-mail, see the **Payment orders** user manual.*

- *Manual payments, see the **MOTO payment** user manual.*

- *Managing your Back Office, see the **Transaction management** user manual.*

3. SIGNING IN TO EXPERT BACK OFFICE

Sign in to the Back Office:
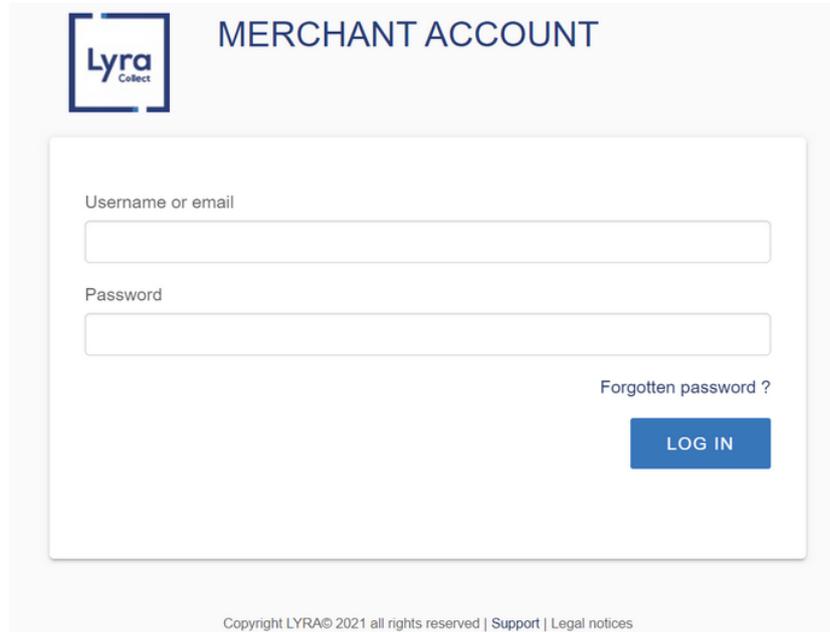
https://secure.lyra.com/portal/

1. Enter your login.

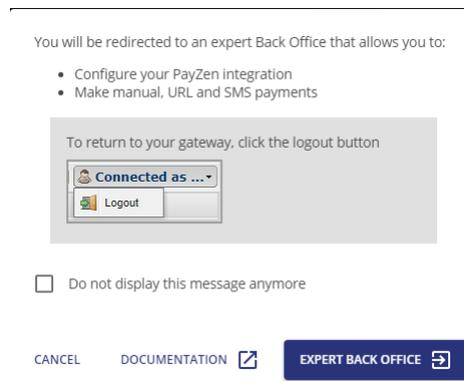2. Enter your password.

3. Click **Login**.

    In case of an entry error of the login and/or password, the error message "*Invalid username or password*" will appear.

    You can correct your entry or click on the link **Forgotten password or locked account**.

4. Click **Other actions**.

    The following window appears:

5. Click on **Expert Back Office** to access your Expert Back Office.

4. CONFIGURING THE FORM

To access form configuration

1. Go to **Management** > **Configuration of the TEST data collection form**

2. Select your shop

   There are different tabs for configuration:

   • **Settings**

   • **Form management**

   Each tab contains suggested default configuration. It can be left unchanged or be adapted to your needs.


IMPORTANT

Configuration can be done only in <u>TEST mode</u>. Do not go into production as long as you have changes to make.

Once your form is in production, if you want to make some changes, go to Management > Configuration of the TEST data collection form > [Your shop].

For more information, see chapter Editing a form in production on page 17.

4.1. Personalizing the form

In the **Settings** tab:
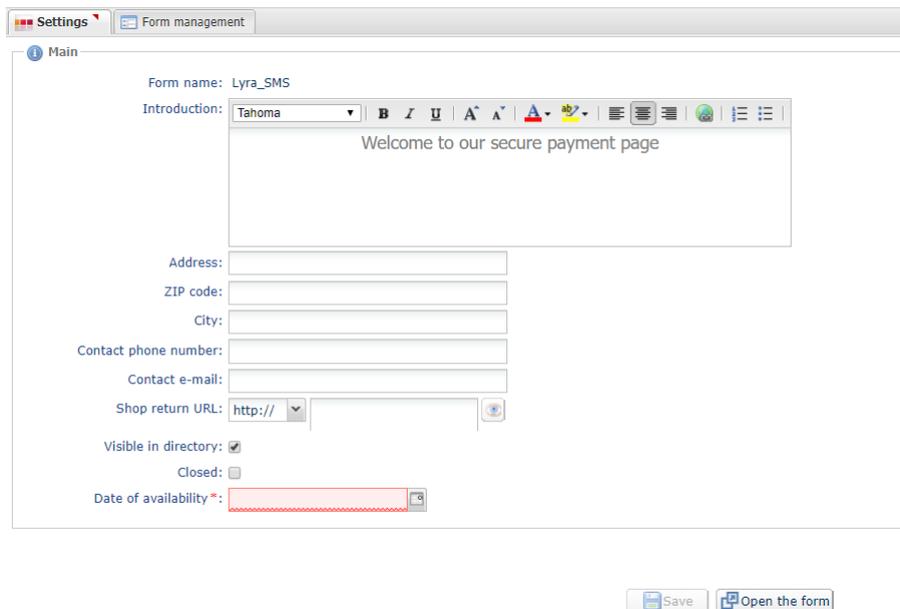
1. Customize the **Introduction**.

2. Change the font, if needed, by choosing another one from the list.

3. Personalize the layout of the text, if you wish, using the icons (alignment, bold, italic, underline, bullet points, etc.)

4. Click the **Source code** button to display the HTML code if you prefer to work in html tag mode.

5. Enter the shop contact details (exact address, phone number, e-mail).

6. Enter the URL for returning to the shop.

   You can test the web address by clicking the **Eye** icon.

   This URL will be used on the payment pages for returning to the shop.

7. Check the **Closed** box if you would like to make your website inaccessible.

   This box defines whether the form is currently accessible online or not.

   Note

   If closed, the website displays the following message:

   This online payment service is temporarily unavailable as requested by the organization that you intend to pay.

8. Enter the **Date of availability** of the form.

   While the website is closed, this date allows to program the date of reopening the website in advance.

9. Click **Save**.

   The confirmation message **Your changes were saved successfully** appears.

10. Click **Open the form** to view the result of the configuration.

4.2. Building the form

The form can be created in TEST mode via the **Form management** tab. This tab consists of 3 areas:

• **List of available fields**

A field list is provided to the Merchant. The labels for these fields are pre-filled but can be edited.

Empty description fields (**Info 1**, **Info 2**, **Info 3**) are available for adding order details. You can rename and/or configure them.

It is also possible to add new fields and configure them.

IMPORTANT
The fields available by default (Title, Last name, First name, Address, etc.) are displayed by default in the language of the shop.
If you wish to change the display language of these fields, contact the Middle Office.

• **Configuration of the selected field**

Allows you to configure the field selected from the **List of available fields**.

A default configuration is proposed for each field and the content is translated into the language of the shop. You can change the default values except for the **field type**.

However, pay attention, since when you change a default label in the **Name displayed** or **Pop-up info** fields, the newly entered content will be displayed in the input language even if the language of the shop changes.

The translation will no longer be automatic and linked to the language of the shop as for the other fields proposed by default.

IMPORTANT
Even if the Amount to be paid is customizable, its value is always presented in one currency, the one used by default by the shop.

- **Build the form**

  This area allows the Merchant to organize their form. It is made up of two sections:

  - Required fields: to confirm the purchase, the Buyer must fill in these fields which will be marked with an asterisk (*) in the payment form.

  - Optional fields: they are displayed in the payment form but the buyer does not have to fill them out.

4.2.1. Adding a new field

You can enhance the list of default fields.

New fields can be added in the **List of available fields** area of the **Form management** tab:

1. Click the **Add** button to create a new field.

2. In the **Configuration of the selected field** area, configure the new field.

- Customize the field name in **Name displayed**.
- Customize the **Field type** according to the data that will be displayed in this new field.
    - *String*
    - *Numeric*
    - *E-mail address*
    - *Drop-down list*
    - *Entry field*
    - *Date*
    - *Amount*

    Example of new field creation:

    Tip

    The Merchant can create a new field using a drop-down list. This list will offer the entire line of business within one single form. It will allow buyers to specify which service they would like to pay for.

- Customize the text of the **Tooltip**.
  The tooltip is the information displayed when the cursor hovers over an element that helps the Buyer when filling in information.

- In **Minimum length**, redefine the minimal number of characters.

- In **Maximum length**, redefine the maximal number of characters.

- Check the **Field to be confirmed** box if you want the Buyer to confirm the entry of the field value.
  For example, when the Buyer enters an e-mail address, they will be required to confirm the entry in another field to ensure that they have entered the correct address.

3. Click **Save**.

The new field is created.

Note

When the newly created field is used in a transaction, its value can be viewed in the **Extras** tab of the transaction details available in the Expert Back Office.

Transactions can be viewed via the **Management** > **Transactions** menu.

To view the details of a transaction:

1. Select the transaction
2. Rick click and select **Display transaction details**.
3. Click **Extras** to view the new field.
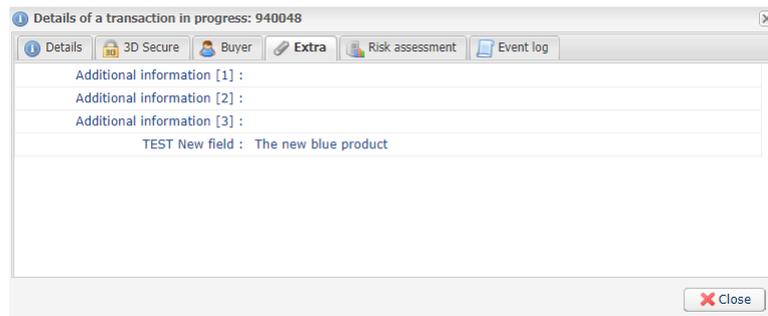
This new field and its value are also displayed in the confirmation e-mail sent to the Buyer.

You can also find them in your transaction report in the **INFO_EXTRA** column.

4.2.2. Configuring a field

This configuration allows you to update the list of existing fields.

To configure a field:

1. Select the field in **List of available fields** of the **Form management** tab.

   Field details appear in **Configuration of the selected field**. Not all data can be changed in the default fields.

2. Make the desired changes.

   Example of configuration of a default field:

   - Customize the text of the **Tooltip**.

     The tooltip is the information displayed when the cursor hovers over an element that helps the Buyer when filling in information.

   - In **Minimum length**, redefine the minimal number of characters.

   - In **Maximum length**, redefine the maximal number of characters.

   - Select the **Field to confirm** checkbox if you want the buyer to confirm the entry of the field value.

     For instance, enter an e-mail and confirm the entry in another field to make sure that the specified address is valid.

3. Duplicate the selected field by clicking **Copy**.

   This action is used for creating an identical field that you can customize.

4. Delete the selected field by clicking **Remove** if it is a field that was created by you.

   Default fields cannot be deleted.

5. Select a field to move it. You can:

   - Send it to the mandatory field area, using the **Required** button or the drag and drop feature.

   - Send it to the optional field area, using the **Optional** button or the drag and drop feature.

Note

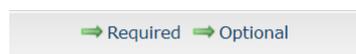When one or several description fields (**Info 1**, **Info 2**, **Infos 3**) are used in a transaction, their values can be viewed in the **Extras** tab of the transaction details available in the Expert Back Office.

Transactions can be viewed via the **Management** > **Transactions** menu.

To view the details of a transaction:

1. Select the transaction
2. Rick click and select **Display transaction details**.
3. Click **Extras** to view the new field.
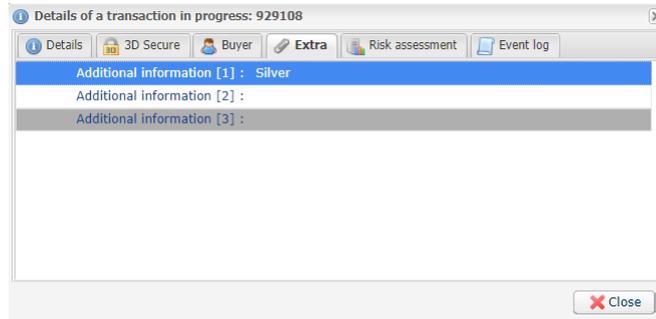
In this example, the merchant renamed the **Info 1** field to "**Product color**" when building the form. The buyer entered **Silver** in the purchase form.

You can also find the value in your transaction report in the **RETURN_CONTEXT** column.

4.2.3. Organizing the form display

There are 3 types of icons for moving and/or removing a form field:

Button	Description
⬇ Move down	Move this field toward the bottom of the form.
⬆ Move up	Move this field toward the top of the form.
⬅ Remove	Remove the selected field from the form.

To organize the form display:

1. Select the field of your choice.
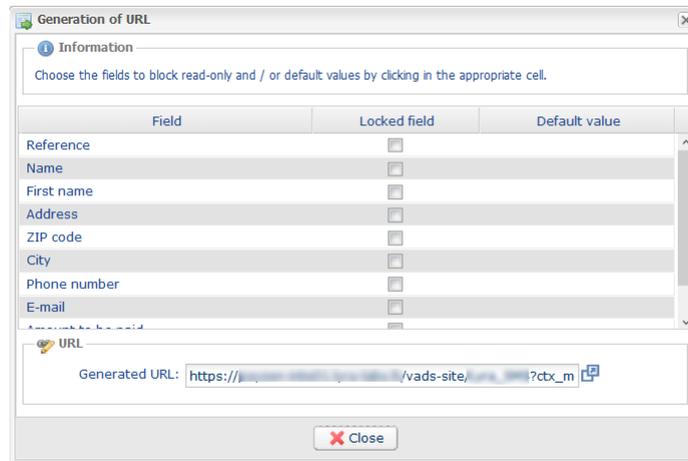
2. Use the **Move up** and **Move down** buttons for choosing the position of the fields in the form.

3. Use the **Remove** button for deleting a form field or for placing it among the required or optional fields.

4. Click **Save**.

   The confirmation message **Your changes were saved successfully** appears.

5. Click **Open the form** to view the result of the configuration.

5. GENERATING A URL

The Merchant has the possibility to pre-fill a data collection form and generate a URL for accessing this form.

The Merchant locks one or more fields and enters the values that they wish to display by default in this form.

1. In the **Form management** tab, click **Generate a URL** at the bottom of the page.

   The URL generation page appears

2. Select one or several fields that you wish to lock by checking the corresponding box.

3. Click the corresponding **Default value** field and enter the desired value.

   For example, the Merchant can pre-fill the Buyer's coordinates, the amount to be paid, the provided service, a supporting message, etc.

   If no values have been entered, the locked field will remain grayed out and will not be editable in the generated form.

   The locked fields and the specified information are added in the payment URL.

   Example:

   ```
   https://mapagedeformulaire.ledomaine.com/vads-site/MaBoutique?
   ctx_mode=TEST&lck_vads_order_id=123654&lck_vads_amount=6999
   ```

4. Your pre-filled link is ready.

   Two ways of retrieving the value of the URL:

   • Select and copy the value of the URL in the **generated URL** field.

   • Or click the **Open the link in a new window** icon.

   The generated URL appears on a web page.

After checking the web page, you can save the URL or send it by e-mail to the Buyer. All you need to do is paste the URL in the body of the message.

By clicking the hyperlink received by e-mail, the Buyer will display the pre-filled data collection form.

6. PUBLISHING THE FORM ONLINE

Once the configuration process is complete, you can publish your form online.

> **IMPORTANT**
>
> **When your shop is in TEST mode, you must systematically request the 1st online publishing by e-mail sent to the sales contact. This request is made automatically when you click the Request online publishing button provided for this purpose, which will appear instead of Publish online upon the first time.**
>
> **Once the sales contact receives the e-mail, he or she will upload the data collection form online. This upload will simultaneously shift the shop into PRODUCTION.**
>
> **You will be autonomous for the following online uploads once your shop is in PRODUCTION mode.**

1. In the **Form management** tab, click the **Publish online** button at the bottom of the page.
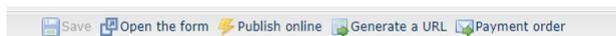
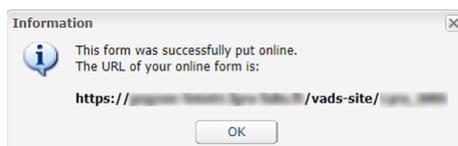
The **Online publishing of the form** dialog box appears.

Note

*Clicking the **Publish online** button automatically shifts the shop into Production mode. If the shop is in Test mode, it shifts into Production mode. If it is already in Production mode, nothing changes.*

2. Click **Publish online**.

In case of successful upload, the information message appears.

Your form is now available in production mode in **Management** > **Configuration of the data collection form** > [*Your shop*]. You also receive a confirmation e-mail.

In case the upload fails, you can contact our technical support team and communicate the error message.

Note

When an online upload is successfully completed, the additional (**Copy the currently online form to the test environment**) button appears. This button allows to copy the form in production and use it instead of the Test form, in order to be able to modify it.

7. EDITING A FORM IN PRODUCTION

You can edit your form in production any time. But it can be done only in <u>TEST mode</u>.

Your form in production can be found in **Management** > **Configuration of the data collection form** > *[Your shop]*.

However, in case of an update or an edit, you must start with the test form found in **Management** > **Configuration of the TEST data collection form** > *[Your shop]*.

1. Copy the form that is currently in production in test environment.

   Once the form has been put into production, the additional button appears among other buttons at the bottom of the page. One click on this button allows to copy the form put into production and use it instead of the Test form.

2. Edit your test form.

   Once you have edited and saved your test form, you must put it into production once again.

8. SENDING THE FORM TO THE BUYER

In order to allow the Buyer to make an online payment, simply send them the URL of the form.

The Merchant can send the URL in an e-mail or provide it directly on their website as a hyperlink or a clickable button.

Figure 1: Example of a form

Note

The pre-filled information or the information specified by the Buyer in the form is accessible in the transaction details via the Expert Back Office.

To define the capture mode (automatic/manual), select it in **Validation mode**, accessible via **Settings** > **Shop** > [*Your shop*] > **Configuration** tab of your Expert Back Office.

9. OBTAINING HELP

Looking for help? Check our FAQ on our website

https://docs.lyra.com/en/collect/faq/sitemap.html

For any technical inquiries or if you need any help, contact *technical support*.

To help us process your demands, you will be asked to communicate your customer code (e.g.: **CLXXXXX**, **MKXXXXX** or **AGXXXXX**).

This information is available in the Merchant Back Office (top of menu).