**SWP-Checkout setup tutorial**

This tutorial guides a merchant in setting up SWP-Checkout (aka: the “Form”) to accept online sale payments. This tutorial is divided into four parts:

* Set the API Login ID, page 2
* Configure SWP-Checkout, pages 3-5
* Deployment, page 6
* Questions, page 7

To begin, login to Virtual Terminal, <https://vt.paymentsgateway.net>, using credentials provided by the enrollment department. If Virtual Terminal access was not provisioned by the enrollment department, the API Login ID may be set within Dex as described in this tutorial:

* <https://fortepayments.freshdesk.com/support/solutions/articles/11000082132-setting-merchant-credentials-within-dex>. Note: within Dex, the API Login ID is referred to simply as “API Login”.

**Set the API Login ID**

Step 1: At left, click the “Gateway Settings” bar.

Step 2: Click the “Gateway Key” option.

Step 3: If the API Login ID field is empty, click the “Generate” button immediately to the right of the field.

Step 4: Click the “Update” button.

**Configure SWP-Checkout**

Step 1: At left, click the “Gateway Settings” bar.

Step 2: Click the “Secure Web Pay” option.

Step 3: Configure the <Main> tab:

1. **Settings Section**: Select the appropriate Merchant.
2. **Settings Section**: Set “Accept Unsigned Transactions” option to “Yes”.
3. **Settings Section**: Set the URL for a merchant endpoint which will listen for postback responses from SWP-Checkout. Setting this URL is only required for merchants which will implement SWP-Checkout postbacks. Click +/- to expand up to 10 configurable return pages.
4. **eCheck Section**: Set “Accept eCheck Transactions” to “Yes” if using the form to accept ACH/eCheck payments. Otherwise, set to “No”. If “Yes”, place a checkmark left of the “Debit” (sale) option. Remove all other checkmarks in this section.
5. **Credit Cards Section:** Set “Accept Credit Card Transactions” to “Yes” if using the form to accept credit card payments. Otherwise, set to “No”. If “Yes”, place a checkmark left of the “Debit” (sale) option. Remove all other checkmarks in this section.
6. **Card Types Section:** If using the form to accept credit card transactions, configure which card types the form will present: Master Card, Visa, Discover, and/or American Express.
7. **Scheduled Transactions:** Set “Accept Schedule Transactions” to “Yes” if the form allows scheduling of recurring automatic payments. If “Yes”, configure which type of payment can be scheduled: eCheck and/or Credit Card.
8. **Contact Info Section:** Configure merchant contact information as it appears on the form.
9. **Configurable Links Section:** No longer used.
10. Click the “Update” button to save changes to the <Main> tab.

Step 4: Configure the <Messages> tab:

1. Select the appropriate Merchant.
2. Click the “Instructions” link.
3. Configure special instructions that will be shown on the payment form immediately below each section heading: **Bill to, Ship to, Payment Information, Order Information**. This step is completely optional. The “Default” button can be clicked to pre-populate some default verbiage. Special instructions may be added or removed as needed.
4. Click the “Update” button to save changes to the <Messages> tab.

Step 5: Configure the <Field Settings> tab:

1. Select the appropriate Merchant.
2. **Bill To Information Section:** Configure requirements for each field in this section. Available choices are: *Optional, Required, Hidden*. Minimally, it is recommended to require input of 1) first and last names –and-- 2) postal code when processing credit card transactions, for AVS verification. Further, it is recommended for email to be optional for sending of notifications.
3. **Ship To Information Section:** Configure requirements for each field in this section. Available choices, per field, are: Optional, Required, Hidden. If not shipping product, all fields in this section can be set to hidden.
4. **Merchant Defined Fields Section:** This section can be used to configure up to 6 merchant defined fields to accept information from the customer for reporting and reconciliation purposes. Consumer Order ID and Wallet ID fields are included standard on merchant reports. Data 1-4 fields are fully accessible through transaction export options.
5. For each field, the following may be configured:

* **Requirement**: *optional, hidden, or required*.
* **Type**: either use any of the predefined types, or, create and use your own custom type with the validation builder. The *Drop Down* type is explained later in this section.
* **Description**: descriptive text describing the field to the customer. This description will be displayed in the field when the form is loaded.

1. Click the “Update” button to save changes to the <Field Settings> tab.

Step 6: Configure the <Style> tab:

1. Select the appropriate Merchant.
2. **Images Section:** For each image category, Main Logo and Side Image, click the “Select” button.

Customizable images consist of at top header and a side image. The images must be in a .jpeg format. Any image can be uploaded but the recommended sizes are as follows:

* + Main Logo, 900px x 100px, .jpeg format
  + Side Image, 150px x 150px, .jpeg format

1. Click the “Update” button to save changes to the <Style> tab.

The *Drop Down* field type from Step 5e. explained:

1. Select the field type as: Drop Down. A “*Drop Down List”* dialog box will be displayed.
2. Click  to add a new list item to the drop-down.

To edit list items:

* + …Edit this row can be clicked to edit the list item.
  + …Cancel can be clicked to cancel unsaved changes to the list item.
  + …Deletecan be clicked to delete the list item.
  + …Save can be clicked to save changes to the list item.

1. Click Edit this row to edit the newly added list item.
   * **Description**: A 15 character name selectable by the customer.

**Examples**: “Building Fund”, “General”, “Operational”, etc.

* + **Value:** For merchant reporting, a 15 character representation of the description.

If the customer selected “Building Fund”, the value on merchant reporting would be: “BF”.

* + **Default:** Click the circle if the new list item is the default shown to the customer upon loading the payment form.

1. Click Save immediately at the right for this new list item.
2. Repeat steps 2-4 as needed.
3. Click the “update” button to save changes to the “Drop Down List” dialog box. The “Drop Down List” dialog will close.
4. If the merchant defined field type requires further edits,
   * … can be clicked to edit Drop Down items.
   * … can be clicked to change the field type.
5. Click the “Update” button to save changes to the <Field Settings> tab.

**Deployment**

Step 1: Click the <Build Form> tab.

*This form generation tool will not remember any previously generate HTML code. For advanced customization, developers can use this tool in conjunction with the SWP-Checkout integration guide (available by visiting* [*https://www.forte.net/devdocs*](https://www.forte.net/devdocs)*).*

Step 2: Select the appropriate Merchant.

Step 3: **Receipt Section** (Optional): After a transaction Is complete, approved or declined, direct the customer to…

Choose one of the following and configure sub-options as appropriate:

* “Payments Gateway”

-or-

* If “Merchants Site” – two additional fields will appear:
  + …using a:
    - **Redirect** (*SWP-Checkout will first display the receipt and then transfer the customer to the specified page. The redirect method will not send postback response data.*)
    - **Post** (*SWP-Checkout will not display the receipt but instead will send postback response data to the merchant configured return page. The merchant in this scenario is responsible for displaying a suitable receipt to the customer.*)
  + …to this page: Enter the URL for the <Redirect> or <Post> methods described immediately above. If using the <POST> method, the URL must be configured in the return page collection described in **Configure SWP-Checkout**, **step 3c.**

Step 4: Click the “Generate Code” button.

* Note: SWP-Checkout configuration changes generally do not require new code to be generated or deployed. The exceptions are in edge cases where the API Login ID and/or the Return Page configurations have changed.

Step 5: Immediately below the “Generate Code” button, copy the generated HTML code. Provide this HTML code to your website administrator or developer to publish. If a link is needed, please email a conversion request to [integration@forte.net](mailto:integration@forte.net) with the generated HTML code from this step.

Step 6: Click the “Test Code” button and allow pop-ups to be displayed by your browser. A blank page will be displayed with a **Pay Now** button.

**Questions?**

Should any questions arise, please do not hesitate to contact the {Forte} integration department.

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