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EC SUITE TRAFFIC MANAGER

Quick Start Guide

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Introduction

This document is a quick start guide to setting up cascade flows within EC Suite Traffic Manager. It is intended to help you configure a basic traffic flow; advanced features are mentioned only briefly. This document is intended to be read by Web developers who will be implementing traffic flows on a Web site.

Overview

Traffic Manager allows cascading payment configurations to be set up as a traffic flow. When a consumer attempts to sign up with your program and is denied for any reason, the consumer will be offered the next available payment option.

Getting Started

Traffic Manager can be located by logging into the EC Suite Admin Portal at https://admin.ecsuite.com and following these steps:

1. Once inside the Admin, click the **Account Info** menu.
2. Click **Account Admin**.
3. Click the **Traffic Manager** link on the left.

You will now see the main Traffic Manager screen.

Creating a Cascade Configuration

Cascade configurations are individual payment options which will be available for consumers. Complete the following objectives to create a cascade configuration.

Creating a Price Point

Click the **Price Points** tab to create a pricing option. Price points are the payment plan options that will be available to consumers.

Select the billing type, base currency, initial price, initial billing period, recurring price, recurring billing period, and the number of rebills using the fields provided. When finished, click the **Save Price Point** button to save your pricing option.

Regional Pricing and Multi-Currency

Regional Pricing and **Multi-Currency** allow you to customize your currency options for different geographical regions. These are considered advanced features and are beyond the scope of this document. Refer to the EC Suite Help File for help in setting up these features.

Creating the Configuration

Click the **Configurations** tab and then the **Create New Configuration** button to begin setting up your configurations. A blank configuration will appear.

In the **General Information** section, fill out the following fields:

- **Name.** Enter a descriptive name for the configuration.
- **Description.** Enter an extended description of the configuration.
- **Processor.** Select the name of the company who will be processing the transaction.
- **Payment Type.** Select the payment type for the configuration.

Selecting a Form

In the **Form Design** section, select the type, layout, and theme for your form. The appearance of the form will be shown below the fields. Optionally, you may edit your form options by clicking the **Form Options** button.

Selecting Pricing Options

In the **Pricing** section, you will choose which price points are available for this configuration; these price points are the options from which consumers will be able to make a selection on the signup form.

Choose between **Standard Pricing** and **Regional Pricing.** Regional Pricing is an advanced feature; for the purpose of this guide, standard pricing will be used.

Next, you will see two boxes; the box on the left shows the price points you have set up. To add a price point to the configuration, click and drag it to the box on the right. You may optionally create a new price point from this screen by clicking the **Create New Pricing** button.

For the purposes of this guide, the **Multi-Currency** and **Advanced Parameters** sections will be left to their default values. Both are advanced features and are not needed for basic configurations.

Saving the Configuration

When finished creating the configuration, click the **Save** button. You will see a confirmation dialog box indicating your changes were saved successfully.

You may create additional configurations by clicking the **Create New Configuration** button. You may also edit existing configurations by clicking the Configurations tab at the top of the screen and then clicking the **Edit** button next to the configuration you wish to modify.

The configurations you create will be used in a traffic flow, as explained in the following section.

Creating a Traffic Flow

When all your configurations have been created and saved, you must create a traffic flow to implement your configurations. Click the **Traffic Flows** tab at the top of the screen to go to the Traffic Flows area.

In the **General Information** section, enter a descriptive **Name** and extended **Description** in the fields provided. **Post Proxy URL** and **Filter** can be left to their default values for the purposes of this guide.

In the **Status** field, select Active or Inactive. Active traffic flows are available to be used while Inactive ones are disabled.

In the **Configurations** section, you will see two boxes; the box on the left shows all configurations you have created. To add a configuration to the traffic flow, simply drag and drop the desired configuration into the box on the right.

When finished, click the **Save** button. This will complete the traffic flow creation process.

Once saved, you may optionally create additional traffic flows by clicking the **Create New Traffic Flow** button at the bottom of the screen. You may also edit exiting traffic flows by clicking the Traffic Flows tab at the top of the screen and then clicking the **Edit** button next to the traffic flow you wish to modify.

HTML code must now be generated to implement the traffic flow on your site, as explained below.

Generate Code

Upon saving your traffic flow, the code for your traffic flow should be generated automatically; if not, click the **Generate Code** button. You may click the **Copy Code** button to copy the code to your computer's clipboard.

This code can now be placed on your Web site. Place the code anywhere you would place a "join now" or "sign up today" type of link. When consumers click the link, they will be taken directly to the signup form.

Support Information

For further assistance setting up your cascade flows or if you have any other questions, feel free to contact Client Support via email at clientsupport@ecsuite.com or by phone at 1.800.382.8197. You can also visit our online support center at http://www.ecsuite.com/cs.