p. 800.467.0253
f. 480.449.8801
clientsupport@ecsuite.com

EC Suite, LLC.
2353 W. University Dr.
Tempe, AZ 85281-7223

EC Suite Traffic Manager

User's Guide

Contents

Introduction

This document is provided as a technical resource for EC Suite clients. It is written for programmers, technicians, and other individuals with advanced programming skills.

This document will outline the processes and procedures involved in configuring the EC Suite Traffic Manager functionality. For a fast setup, refer to the Traffic Manager Quick Start Guide. Further support information will be provided at the end of the document.

Overview

EC Suite Traffic Manager uses cascading payment options to allow consumers additional options when the first payment attempt is declined. This functionality can incorporate multiple payment methods as well as payment processors. For example, if a transaction is declined when the consumer attempts to pay using a credit card with EC Suite, the consumer can be presented with an option to pay using EC Suite online check or a credit card through SegPay. These are only a few examples of the many different ways to configure Traffic Manager.

The goal of Traffic Manager is to increase sales opportunities for EC Suite clients. If limited payment options are given to consumers, they may be blocked from making a purchase on your site due to a declined transaction. Traffic Manager attempts to alleviate this issue by offering additional payment options while offering clients the flexibility of using multiple payment processors to handle the transactions.

Each payment option is known as a **Configuration,** and multiple Configurations make up a **Traffic Flow.** Traffic Flows allow configurations to cascade to one another when a payment option is declined. Configurations and traffic flows are explained in later in this document.

Accessing Traffic Manager

Access Traffic Manager using the following steps:

- Log in to the EC Suite Admin Portal at https://admin.ecsuite.com.
- Click the **Account Info** menu.
- Click **Account Admin.**
- Click the **Traffic Manager** link on the left. You will be taken to the Traffic Manager **Start** page.

The Traffic Manager Start page lists the components of Traffic Manager, each of which is explained in detail below.

Price Points

This section discusses the creation, use, and maintenance of **Price Points** to be used within Traffic Manager. Price points are the pricing amounts that consumers will pay when making a purchase on your site. Price Points will be used in the creation of Configurations, explained later in this document.

To create a new Price Point, click the **Create New Price Point** button on the Traffic Manager home page or click the Price Points tab at the top of the browser window. You will be taken to the price point creation screen.

Fill out the following fields on the form to create a Price Point:

- **Billing Type.** The type of billing that will occur. **Single Billing** means the consumer will be billed only once, and **Recurring Billing** means the consumer will be rebilled after a specified number of days. The total number of rebills can be defined later in the form.

- **Base Currency.** The base currency type in which the amount will be shown to the consumer.

- **Initial Price.** The price for the first billing period. If Single Billing is selected above, this will be the only payment made by the consumer. If offering **Trial** subscriptions, the Initial Price will be the Trial price. This amount is due the moment the consumer's payment information is accepted.

- **Initial Billing Period.** The length of the first billing period. If using Trial subscriptions, enter the length of the trial. This field does not apply to Single Billing transactions.

- **Recurring Price.** The amount the consumer will pay after the Initial Billing Period has expired. This field does not apply to Single Billing transactions.

- **Recurring Billing Period.** The length of time between rebills. This field does not apply to Single Billing transactions.

- **Rebills.** The total number of times the subscription will rebill. You may select one of two options: **Indefinitely** means rebills will continue until the consumer cancels the subscription. To rebill a specific number of times, click the **Times** option and enter the desired number in the field.

Click the **Save Price Point** button to save your price point. When the save is complete, you will see a confirmation dialog box confirming the save. Click **OK.** You may now choose to create additional price points or continue configuring Traffic Manager.

Note: Once a Price Point has been created, it cannot be modified or deleted.

Regional Pricing

Regional Pricing is a feature that allows you to utilize the international currency market to increase sales opportunities. Pricing values can be converted to different forms of currency at custom or pre-determined rates, allowing customized pricing options in the native currency of consumers. This also enables you to charge a flat base amount that stays consistent in all regions. For example:

Suppose that without using Regional Pricing, you charge $19.95 USD for a monthly subscription. A consumer from Europe views the signup form, is presented with the $19.95 USD pricing, and signs up. You earn $19.95 (gross) for that transaction.

Now, suppose that with Regional Pricing, you charge $19.95 USD monthly for all subscriptions that originate from countries that use the US dollar for their currency. You charge €19.95 to consumers that originate from European Union countries. When consumers from the US subscribe, you earn a gross total of $19.95 USD for that transaction. But when a consumer from the EU subscribes you earn a gross total of $31.27 USD (figure based on the currency exchange rate as of April 3rd, 2008).

Several different options are available for Regional Pricing currency conversion rates, explained in the following sections. Two setup modes are also available: **Basic** and **Advanced.**

Basic Mode

Regional Pricing can be enabled in Basic Mode without going through Traffic Manager. From the Edit Account screen, simply click the **Accept Regional Pricing** button. This will automatically update your pricing options to reflect Regional Pricing using the **EC Suite Recommended** currency conversion rates, explained in greater detail below. This is the only required step to enable Regional Pricing.

Optionally, you may choose to automatically update your rates when the EC Suite Recommended rates are updated. To do this, click the **Opt In** box prior to clicking the Accept Regional Pricing button. You will see the **Status** field change to **Enabled,** signifying that Regional Pricing is enabled on the account. EC Suite Recommended rates are updated frequently.

If you choose to accept Regional Pricing but not Opt In for automatic updates, you will receive an email notifying you when the EC Suite Recommended rates are updated. The email will also contain additional instructions on how to accept the new rates. If you prefer to keep the current rates and not accept the update, you may do so.

You may also view the result of the updated rates prior to accepting them. From the Edit Account page, select a pricing option from the drop-down menu. The table will update to show the new prices. Note that changes have not yet been made at this time; changes will go into effect only after clicking the Accept Regional Pricing button.

Advanced Mode

Regional Pricing can be fine-tuned through Traffic Manager by using the Advanced Mode features. To begin, click the **Regional Pricing** tab from the Traffic Manager Start page.

> ***Please note that EC Suite is NOT responsible for loss of revenue that might occur when using the advanced features of Regional Pricing. Please make sure that you understand the Regional Pricing feature thoroughly before enabling any of these advanced features. If you do not, please use the "Basic Mode" of Regional Pricing.***

After clicking the Regional Pricing tab from the Traffic Manager Start page, you will be taken to the Regional Pricing setup page.

In the **Create Regional Pricing** field, enter a name for your Regional Pricing profile. Profiles can later be edited by selecting them from the **Edit Regional Pricing** menu on this page.

Select a **Base Currency and Price Point** from the list. This will be the Price Point for which the advanced options are configured. You may also choose to apply a **Blanket Rule Set** that will affect all price points on the subaccount; this feature will be explained in an upcoming section.

Initial Price

After selecting a Price Point, the **Initial Price** section will appear for you to define currency conversion settings on the Initial Price. The tables that appear are organized as follows:

EC Suite Recommended

EC Suite Recommended Rates are currency conversion rates recommended by EC Suite. These rates are considered by EC Suite to be stable in an ever-changing currency market. The table shows a flag representing each region's currency, with the first row showing the equivalent conversion to the US dollar. The second row shows the inverse, meaning the equivalent US dollar value of a single unit of that region's currency. Click the **Apply** button next to the EC Suite Recommended Rates table header to apply the rates to the selected Price Point. This will enter the EC Suite Recommended Rates into the Custom Conversion Price fields in the Regional Pricing table, explained in greater detail below.

Because the EC Suite Recommended rates are updated on occasion, you can choose to automatically update your currency conversion rates whenever the EC Suite Recommended rates are updated. To do so, return to the Edit Account screen, check the box to **Opt In,** and click **Accept Regional Pricing.** See the Basic Mode section above for more information.

If Regional Pricing is already enabled but you have not opted in for automatic updates and would like to do so, click **Decline Regional Pricing.** Once the **Status** has changed to **Disabled,** click Opt In, and then click the Accept Regional Pricing button. (Regional Pricing must be declined and re-accepted for the Opt In to take effect.)

Daily Dynamic Rates

Daily Dynamic Rates change dynamically throughout the day depending on the current state of the currency market. Values are updated automatically by EC Suite as new rates become available. Click the **Apply** button next to the Daily Dynamic Rates table header to apply these rates to the selected Price Point.

Custom

Currency conversion rates can be customized by using the **Regional Pricing** table. The columns are organized as follows:

- **Currency Regions.** A flag represents each currency region, with the symbol and 3-letter code for that currency appearing next to the flag. Each row describes how that form of currency will be used to convert the selected Price Point.

- **Daily Dynamic.** A radio button will appear for each form of currency using the Daily Dynamic Rates option.

- **Custom Fixed Price.** You may select the radio button and enter a custom fixed price for any form of currency listed. This amount will not be subject to any conversion rate.

- **Custom Conversion Price.** You may select the radio button next to each currency option and enter a custom currency conversion rate. Click the Auto Rate option to re-calculate the final values in the Final Price field.

- **Final Price.** This field shows the price the consumer will see on the signup form for the selected Price Point once Regional Pricing is implemented.

You may also choose to round values using the options at the top of the Regional Pricing table. Values can be rounded up or down to the nearest whole number, or the nearest value ending in .00, .95, or .99. This option is typically used to make prices look more familiar or aesthetically-pleasing on the form.

Recurring Price

The same options are available for the **Recurring Price** section as the Initial Price section. You can enter custom values or click the **Apply same settings as above** check box to keep your settings consistent with the Initial Price.

Applying a Blanket Rule Set

This option is used to apply settings to all Price Points on an account. When the radio button is clicked, different sections will appear for each currency to be fine-tuned. The options work primarily the same way, with some subtle differences. In a Blanket Rule Set, options are set for each individual base currency, rather than just the base currency for a selected Price Point. Because Blanket Rule Sets apply to all Price Points, no individual Price Point will be selected.

In the **Regional Pricing** table, use the radio buttons in the **Custom Conversion Method** field to set each form of currency to use the Daily Dynamic or Custom Conversion rate. Clicking the Apply button in the Daily Dynamic Rates table will apply that rate to each form of currency in that region, while clicking Apply in the EC Suite Recommended table will apply those rates to the Custom Conversion setting. You may also enter a custom value in the box.

The **Alert Values** field applies to Daily Dynamic Rates. Because these values fluctuate, sudden drops in the value of a currency can potentially result in a substantial loss of revenue. Alert Values are used to alert you via email if a currency value changes to go above or below a specified threshold. Values are calculated by percentage.

To receive these alerts, click the left radio button and enter your preferred minimum and maximum percentages in the appropriate boxes. This will allow you to be alerted when a value increases or decreases by your specified percentage; for example, if you enter a minimum of 5% and a maximum of 10%, you will be alerted when the value of that currency decreases by 5% or increases by 10%. Note that when alerts are sent, no changes to your settings will be made; any desired updates must be made manually.

You may also choose to not receive alerts by clicking the **Stop Alerts** radio button.

Saving Regional Pricing

Click the **Save Regional Pricing** button to save your changes. (You may also click the **Reset** button to undo the changes you have made.) When the save is complete, a confirmation dialog will appear. Click **OK** to continue and return to Regional Pricing. You can now continue setting up Traffic Manager.

Currency Conversion Calculator

For ease of reference, a currency conversion calculator is available at the bottom of the Regional Pricing page. Enter the amount in the field, select a currency to convert from, select a currency to convert to, and click the **Go** button. The new value will appear in the table. Note that using this tool will not cause any changes to be made to your Regional Pricing settings.

Multi-Currency

This section will discuss the use of Multi-Currency within Traffic Manger. **Multi-Currency** is a method of localizing payment options for consumers in various geographical regions of the world; this means displaying the payment form in the consumer's local language and currency. Multi-Currency is optional and not required to use Traffic Manager, but is required to use Regional Pricing. Multi-Currency can, however, be used without Traffic Manager. For more information about using Multi-Currency outside Traffic Manager, please consult the EC Suite help file at the online support center.

Note: Multi-Currency is enabled by default on all EC Suite accounts. If you have disabled Multi-Currency on your account and wish to use Regional Pricing, please call Client Support to re-enable Multi-Currency.

To use Multi-Currency within Traffic Manager, a Multi-Currency profile must be created; this profile will later be applied to Configurations. To begin, click the Multi-Currency tab at the top of the screen. This will take you to the Multi-Currency setup screen.

Enter a name for the profile in the **Create** field. You may optionally set the current profile to be the **Subaccount Default** by selecting the **Yes** option in that field. If **No** is selected, the profile can still be used, but must be selected manually when creating Configurations.

Multi-Currency Display Options

The **Multi-Currency Display Options** table shows which forms of currency are available to each geographical region. The first column, labeled **Currency Regions,** shows the applicable regions. Each row shows the currencies available for those regions. Forms of currency that are checked are available for that region.

To enable or disable a form of currency for that region, simply click the corresponding check box. Checked means the currency is available and unchecked means it is not. When the consumer views the payment form, only the enabled currencies for the consumer's region will be available.

When finished, click the **Save Multi-Currency** button. When the save is complete, a dialog box will appear, confirming the save. Click **OK** to continue.

You may edit your Multi-Currency options by selecting a profile from the list in the **Edit** field. You may also, at any time during the creation or editing process, restore your changes back to the previous saved settings by clicking the **Reset** button. No changes will be confirmed until the Save Multi-Currency button is clicked.

Configurations

Configurations are the individual payment options available to consumers and form each step in the cascading traffic flow process. To begin, click the **Configurations** tab from the Traffic Manager Start page.

Creating a Configuration

Click the **Create New Configuration** button to create a new Configuration. You will be taken to the Configuration setup screen. Several sections will need to be completed, as described below.

General Information

Fill in the following fields:

- **Name.** A name to identify the configuration; for example, ECSuite_Credit or SegPay_Credit. The name can be anything you choose.

- **Description.** A brief description of the Configuration. This value can also be anything you choose.

- **Processor.** The company that will process the transaction. Several options are available, and EC Suite is not required to be selected as a processor. Please note that you must have an account with that processor in order to process through them using Traffic Manager.

- **Payment Type.** The type of payment that will be offered to the consumer. Additional information may be required depending on the processor selected; for example, selecting SegPay will require an E-Ticket ID. This information must be obtained from that processor in accordance with you account information with that processor.

- **Status.** Setting the Configuration as **Active** will enable the Configuration to be used in a Traffic Flow; **Inactive** will prevent it from being used.

Next, you will need to create the form that consumers will use to make purchases using this configuration.

Form Design

This section designs the form in which the consumer will enter payment information. This section is only shown when using EC Suite as a processor; using other processors will use the default form configured on your account with that processor. To configure a form, make the following selections from each list:

- **Form Type.** Choose a Standard or Customizable form. Additional form options not related to Traffic Manager can be accessed by clicking the **Form Options** button.

- **Form Layout.** This setting is purely aesthetic and does not affect the functionality of the form. A thumbnail preview of the form will show in the form selector below the list.

- **Form Theme.** This setting is also aesthetic and allows you to pick a color scheme that fits within your site design.

- **Form Selector.** This section shots thumbnail previews of all forms available with the settings you have selected. Click the left and right arrows to cycle through available forms. Clicking the Form Options button will open the **Form Admin** screen, outside of Traffic Manager. Additional modifications using the Form Admin are not required to use Traffic Manager.

Next, pricing options must be selected for the Configuration.

Pricing

This section of the setup process defines which pricing options will be displayed on the form. Two pricing types are available:

- **Regional Pricing.** This option allows you to use Price Points created earlier in the Traffic Manager setup process.

- **Standard Pricing.** This option allows you to use pricing options that were created outside Traffic Manager, using the **Pricing Admin** feature of the EC Suite Admin.

Below the Pricing field, two lists are shown. The **Available Pricing** list shows each Price Point available under the selected pricing type, while the **Selected Pricing** list shows each Price Point that is currently showing on the form.

Click and drag Price Points from the **Available** list to the **Selected** list to add them to the form. Consumers will be able to select from each option shown in the Selected list.

At this time, you may optionally choose to create additional Price Points by clicking the **Create New Pricing** button. A window will appear for you to enter the new pricing information; when finished, click the Submit button in the popup window. The pricing option will appear in the list. Note that Price Points created this way will only appear when Standard Pricing is selected; if you would like to use Regional Pricing with this Price Point, you will need to configure that Price Point in the Regional Pricing section of Traffic Manager.

Multi-Currency

Select a Multi-Currency profile from the list. This profile was created in the Multi-Currency section of Traffic Manager; if you are using Regional Pricing, Multi-Currency must be used. If you intend to use Regional Pricing and have not yet created a Multi-Currency profile, you must do so before continuing.

Advanced Parameters

Advanced Parameters are optional additional tracking parameters. These are used by clients who wish to use additional tracking mechanisms. These values may be required by other processors, or optional to allow additional functionality. The value will be passed through to the processor's tracking system whenever that particular Configuration is loaded, or comes up in the cascade. The value will still be passed even if the consumer chooses not to pay and closes the form. EC Suite does not require the use of this feature; however, other processors may require additional parameters. If you are not sure whether or not you should use this feature, consult the company who will be processing the transaction.

To configure an Advanced Parameter, enter the following values:

- **Key.** This value is the name of the variable being tracked.

- **Value.** This is the value of the variable being tracked.

Click the **Add** button to add the Advanced Parameter. You may edit a parameter by clicking the **Edit** button next to that parameter, or delete it by clicking the 'X'.

Saving the Configuration

When finished creating the Configuration, click the **Save** button at the bottom of the screen. When the save is complete, a dialog box will appear to confirm the save. Click **OK.** You may now create additional Configurations by clicking the **Create New Configuration** button, if desired.

To begin using your Configurations, you must now set up a Traffic Flow.

Traffic Flows

A **Traffic Flow** is comprised of one or more Configurations, each cascading to the next when a consumer's payment is declined. To begin, click the **Traffic Flows** tab from the Traffic Manager Start page.

Traffic Flows are created in a similar fashion as Configurations. Complete the following sections:

General Information

- **Name.** A descriptive identifier for the Traffic Flow; for example, "Spring 2008." This name can be anything you choose.
- **Description.** A brief description of the Traffic Flow. This value can also be anything you choose.
- **Post Proxy URL.** This value is optional. If you wish to receive Postback information from Traffic Manager transactions, enter the URL where this data is to be sent. For more information regarding this feature, consult the Background Post User's Guide.
- **Filter.** This feature is currently in development. Select the DEFAULT option.
- **Status.** Select **Active** to enable the Traffic Flow or **Inactive** to disable it.

Next you will define which configurations will be used for the Traffic Flow.

Configurations

This area allows you to define the cascade sequence of your Traffic Flow.

In this section, two lists are shown. The **Available** list shows each Configuration you have created, and the **Selected** list shows each Configuration currently used in the Traffic Flow (the Selected list will be empty when the Traffic Flow is first created).

Click and drag a Configuration from the Available list to the Selected list. You can change the order in which the Configurations cascade by dragging them up or down in the list. The cascade will begin with the Configuration at the top of the list and continue downward.

Saving a Traffic Flow

When finished creating the Traffic Flow, click the **Save** button. When the save is complete, a confirmation dialog will appear to confirm the save. Click **OK.** You now have the option of creating additional Traffic Flows by clicking the **Create New Traffic Flow** button, or implementing the one you just finished.

To implement a Traffic Flow on your site, you must first generate HTML code for the Traffic Flow.

Generate Code

Utilizing a Traffic Flow is as simple as pasting a line of HTML link code on your Web site. The code will appear in the **Generate Code** field once the Traffic Flow is saved, but you can also click the Generate Code button to get the code if the field is currently empty. Clicking the **Copy Code** button will copy the code directly to your computer's clipboard. The code can now be pasted on your site.

The HTML code is an URL that takes the consumer to the payment form and can be used anywhere you would post a "Join" link. The following HTML would be one example of how to use the code:

```
<a href="https://bill.ecsuite.com/jpost/billingCascade.cgi?
clientAccnum=900100&clientSubacc=0002&cascadeId=571" title="Join
Today!">Join Today!</a>
```

Once the code has been placed on your site and the Traffic Flow's Status has been set to Active, the Traffic Flow is enabled on your site. The rest of the process is handled automatically. Additionally, once the code is generated, you will never have to re-generate the code when changes are made to the Traffic Flow. Any changes you make will be handled automatically.

Copying and Editing a Traffic Flow

Traffic Flows can be edited at any time by returning to the Traffic Flows tab and clicking the Edit button next to the Traffic Flow you wish to modify. You may also create a Traffic Flow similar to an existing one by clicking the **Copy** button; this will create a new Traffic Flow identical to the one copied. The new Traffic Flow can then be changed and saved with a new name while keeping the original Traffic Flow intact.

Support Information

EC Suite 24/7 Client Support: 1.800.382.8197

Email: clientsupport@ecsuite.com

Online Support Center: http://www.ecsuite.com/cs/