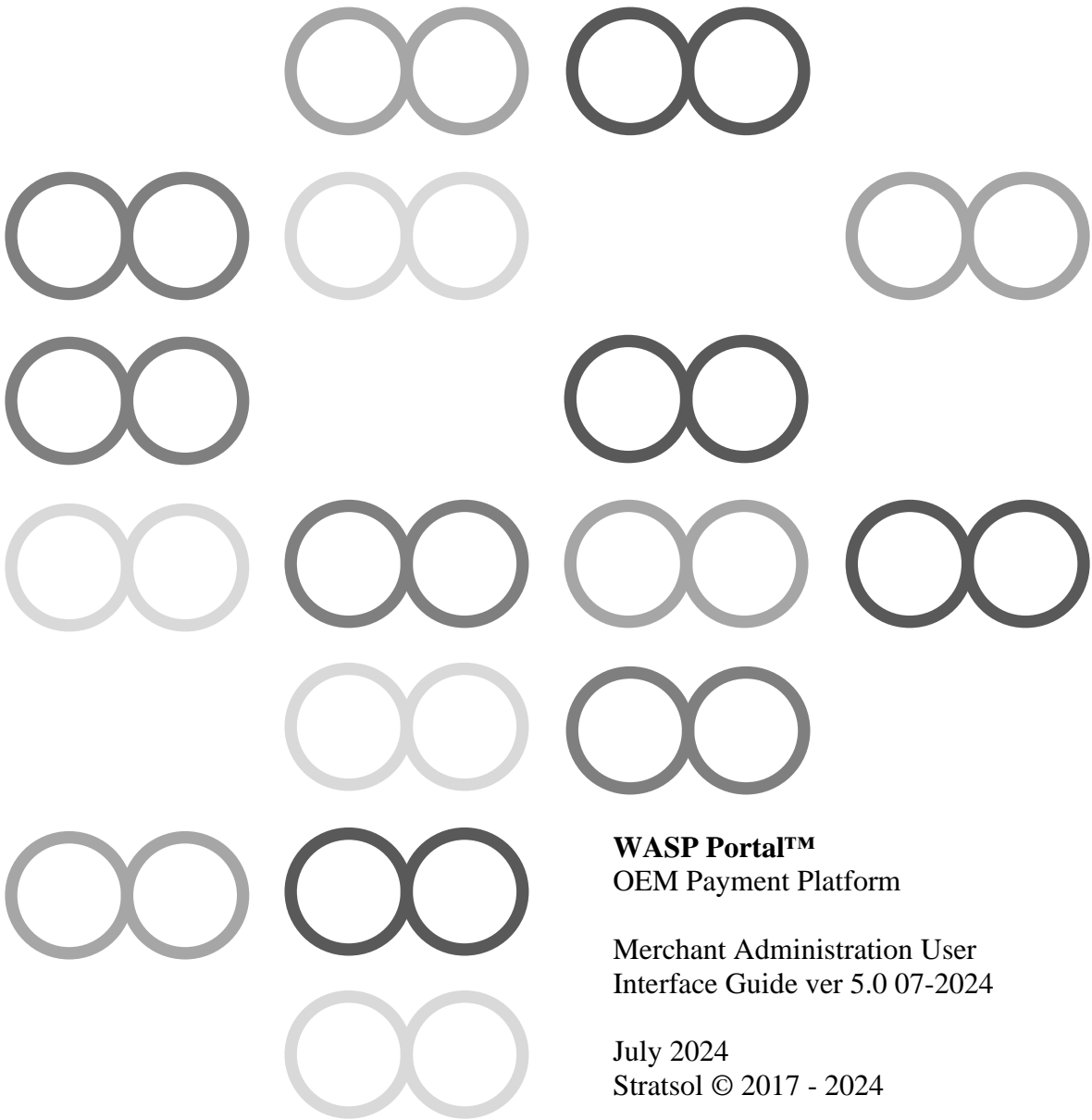*WASP Portal*

WASP Portal™ Merchant Administration
User Interface Guide

WASP Portal™
OEM Payment Platform

Merchant Administration User
Interface Guide ver 5.0 07-2024

July 2024
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1. Introduction

Stratsol has implemented a Payment Gateway facility to enable merchants and processors to accept common payment cards for Electronic Commerce (EC) and Point of Sale (POS). This Manual is specific to EC merchants only.

The service is known as the WASP Switch, and provides a high function payment service that simplifies the payment acceptance process. The WASP Switch provides an outsourced proposition to acquirers, merchants and payment processors (collective referred to as *Payment Service Providers* or PSPs in this document) for this payment services.

The WASP Switch consists of internet front-end payment and account management functions and an on-line administrative platform to a web hosted application. This document details the online administration functions, known as the WASP Portal Merchant Administration (WASP-MA). For information on the payment and customer account management functions refer to the *Stratsol Product Services Guide for E-commerce Merchants and Processors*.

The Merchant Administration (WASP-MA) functions of the WASP Portal allow users to monitor, manage and report on transactions made through the WASP Switch. This is done by logging onto a web-based user portal and navigating through a series of easy to use screens using any standard web browser.

In this manual all users of the WASP-MA system are generically referred to as *users*, though they may include Merchants, Payment Service Providers (PSPs), Third Party Processors (TPPs) and Acquirers.

1.1. Requirements

To use WASP-MA, users will need:

- A Merchant Abbreviation
- A User ID and relevant password
- Access to the Internet through a common browser such as Edge, Chrome or Firefox. Less common browsers may also work, but not all may have been tested
- JavaScript enabled

1.2. Target Audience

This manual is aimed at merchants, PSPs, acquirers and operations staff who need to use the WASP-MA service and assumes knowledge of web application usage, payments processing through the WASP Switch payment gateway and the processes used by the applicable merchant or PSP.

1.3. Related Documentation

While this document details the online administration functions, WASP-MA; for information on the payment and customer account management functions of the WASP Portal, refer to the *Stratsol Product Services Guide for E-commerce Merchants and Processors*.

1.4. Support

For any questions or assistance with the WASP-MA product, please contact your support team at the support email provided at enablement e.g. *supportXX@strat-sol.net,* where XX is unique to a particular user.

2. Product Description

2.1. Services Provided to the Users

The services provided to users by the WASP Switch through the hosted platform are functionally divided into the following groups:

1. Merchant Administration Functions
2. Client and User Account Management
3. Transaction Analysis and Management

The *Client Account Management* service is also accessible using a Web-Services Application Programming Interface (API) style connection mechanism. This interface and associated APIs are documented in the *Stratsol Product Services Guide for E-commerce Merchants and Processors.*

The *Merchant Administration* functions are described in this document.

For reference, the following diagram describes the WASP Switch system.
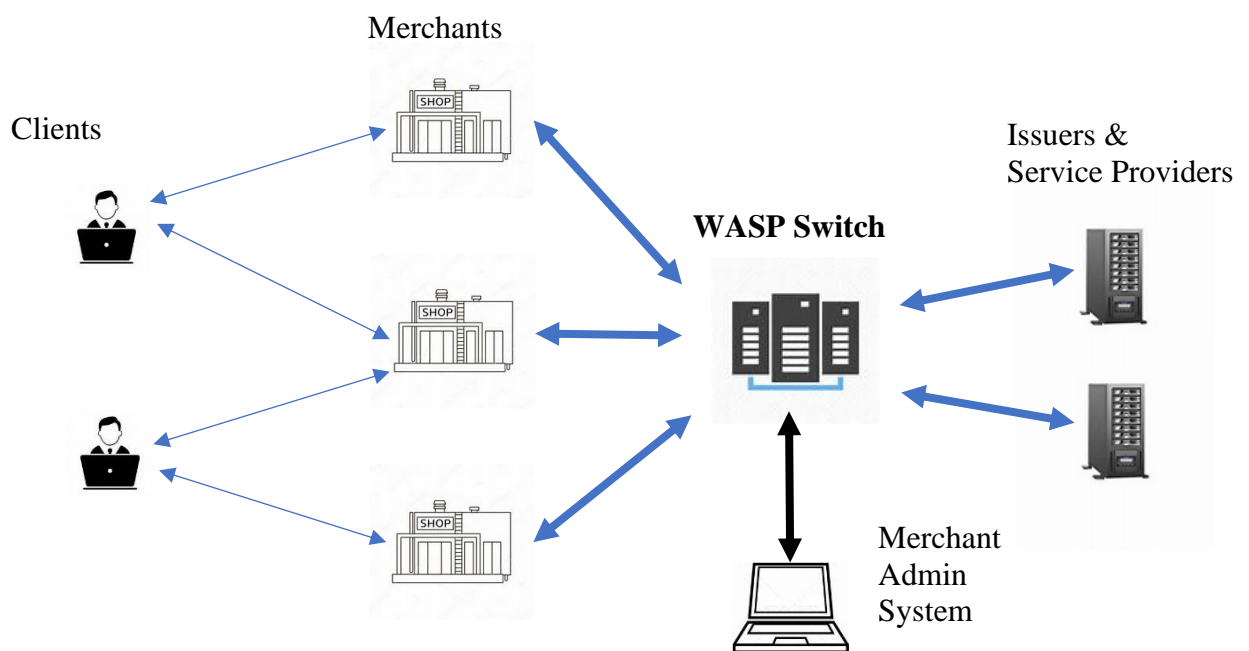
Figure 1. Stratsol Architecture

3. Merchant Administration System (WASP-MA)

Enablement for on-line payments is part of the WASP Switch product for merchants. The user may also want to perform other payment management functions such as manually creating users and clients, checking transaction details and totals, and creating reports.

The WASP-MA Merchant Administration facility manages this by providing the user with secure browser access to the WASP-MA central transaction database to perform day-to-day merchant functions. The merchant is provided with tools for searching, reporting and managing client accounts and payment transactions.

In the following sections WASP-MA web pages are displayed in italics (e.g. *WASP-MA Home* page); and user input fields, check boxes, keys or buttons are in bold between angle brackets (e.g. <**Submit**>).

3.1. WASP-MA Functions

The key features of WASP-MA include:

- WASP-MA has various types of user with different privileges and rights to access the information provided by the system. These are detailed below under *Managing WASP-MA Operators*.

- Users may use the WASP-MA system to manage their own users and clients' details. Users and clients can be added to the user or client database and existing users' and clients' details can be changed or deleted.

- Users may perform interactive searches of their own transaction logs and download detailed information about specific transactions. Searches can return a single transaction or a range of transactions.

- Each transaction has the functionality to show all details (e.g. authentication codes, fees, client details).

- WASP Documentation, settlement and other reports may be downloaded from the WASP-MA Portal.

- User access is secured using 128-bit SSL. The user is identified by an ID and password.

- Multiple user operators can be created and granted different privileges based on responsibility levels.

In addition to the WASP-MA Portal, merchants can use the WASP-AM and WASP-PM functions described in the *Stratsol Product Services Guide for E-commerce Merchants and*

Processors to directly access the WASP-MA server from within their business application to perform client and user management and payment related functions.

Both methods allow use of a common merchant administration process. All transactions are presented in one database.

3.2. Getting Started with WASP-MA

WASP-MA allows the user, as an authorised operator, to monitor and manage their electronic transactions. Authorised operators can log in to WASP-MA from the *Merchant Administration Login* page. Once logged in, they can use the various features of WASP-MA.

Test and Production Portals

Stratsol provides PSPs, acquirers and merchants with a *Test* platform and a *Production* platform; generally, the test platform is used to ensure that the users' systems are properly enabled for WASP Switch processing; before the user begins to process live transactions on the production platform. Similarly, WASP-MA provides a test portal where test merchants, clients and transactions can be managed and a production portal where production merchants, clients and transactions are managed. Users will be given access to the test, production or both portals depending on which system(s) they are required to manage.

Authorised user personnel must be set up as users before they can log in. Users will be provided with URL, user ID and password details for the relevant (test or production) WASP-MA portal as part of the enrolment process.

The Portal User Interface

As the menu options listed below are self-explanatory and rely on user known or generated information, the details of each item is not described below. However, the WASP-MA system provides context sensitive information for each field, available by placing the cursor on the relevant field or input box.

The administration options available to you depend on the features provided as part of the WASP-MA enrolment process. The options available to users will also depend on the specific user's privileges and all the options described below may not be available to all users.

The WASP-MA user interface is based on

- **Lists** – Tables of information specific to Merchants, Users, Clients and Transactions which the current user has access to.
- **Forms** – Used to query, create, view or change merchant, user, client and transaction data retrieved from the WASP-MA server.

A single List or Form can be open and displayed on the main WASP-MA web page at any a time. WASP-MA uses menus, buttons, text fields and icons to get input from the user.

WASP-MA uses notification boxes to notify users of important messages and errors as well as to confirm user's input choices when required.

- **Alert Box** – general information to alert on user interface events, for example data being received from the WASP-MA server. Alerts are blue in colour.
- **Confirm Box** – used to confirm user input, for example to confirm deletion of a client or user. Confirms are green.
- **Warning Box** – used to notify the user of an error or warning condition, for example a user attempting to perform a WASP-MA function for which they do not have sufficient access rights. Warnings are red.
- **Information Box** – used to provide the user with important required information, for example new User login details, new Merchant IDs and new Client gateway IDs. Information boxes are white.

If Confirm Boxes are closed by clicking on the **<OK>** button or pressing the **<Enter>** or **<Space>** keys; the action being confirmed is accepted and processed. If a Confirm Box is closed by clicking the **<Cancel>** button or pressing the **<Esc>** key, the action is cancelled, and the user is returned to the previous page or form.

All other boxes can be closed by clicking on the **<OK>** button or pressing the **<Enter>**, **<Esc>** or **<Space>** keys.

3.3. Logging In

To access the administration functions the user must navigate to the WASP-MA URL, choose whether they are logging into the test or production portal, enter their merchant abbreviation, username and a password.

Note that merchant abbreviations, usernames and passwords are not common to the test and production portals and users will only be able to use their credentials to login to either the test or production portals, and not both. The required portal is chosen from the dropdown menu, **<Portal Platform>**.

If the user has forgotten their password, they can click the <**Forgot password?**> link which will notify the WASP-MA server to reset the user password, allocate a temporary password and send it to the user's registered email address. The user will need to enter their merchant abbreviation and username to use this function. If a password is incorrectly entered 5 times in succession, the system will force a password reset using the same process.

- The merchant abbreviation is a unique abbreviation set up for a particular merchant.
- The username will have been allocated at enablement or created by the Administrator for a particular merchant, PSP or acquirer.
- The password must be at least 8 characters long and include one alphanumeric, one upper case, one lower case and one special character.

Selecting the **<Show Password>** check box toggles the password entry field between show and hide password modes.

Clicking **<Login>** or pressing the **<Enter>** key submits the entered merchant abbreviation, user name and password to the WASP-MA server for authentication.

Clicking **<Cancel>** or pressing the **<Esc>** key clears all the input fields and repositions the cursor in the portal platform field.

Changing Your Password at Initial Login

During the log in process the user may be prompted to change their password. This could be because they are logging into WASP-MA for the first time, using a temporary password after a password reset or the password has expired after a predefined time. In this case a *Change Password* popup is displayed, which requires the user to enter and confirm a new password which conforms to the WASP-MA password requirements.

Selecting the **<Show Password>** check box toggles the password entry fields between show and hide password modes.

Clicking **<Submit>** or pressing the **<Enter>** key submits the entered password to the WASP-MA server for processing and logs the user into the portal.

To clear the *Change Password* popup and return to the main login window, refresh the page using the browser 'reload page' option.

Users can log out of WASP-MA at any stage. If users do not log out, they will eventually be logged out after a specified period of no activity.

3.4. The WASP-MA Home Screen

After login the user is presented with the *WASP-MA Home* screen; user options are provided on the menu bar at the top of the screen.

The test portal is differentiated from the production portal with the message *Test*, next to the logo at the top left of the screen.

The *Merchant List* is automatically loaded and displayed; this list contains the names, contact information and status of the merchants which the user has access to. Only merchants with a status of Active (coloured in blue) can perform payment related transactions on the WASP Switch.

Clicking on the logo at the top left of the screen will return the view to the top of the page.

Logout

Logout using the **<Logout>** option on the top right of the screen which will close the *Home* screen, clear any open forms and lists and return the user to the *Login* page.

<u>Edit User Settings</u>

The current user's settings are accessed by selecting the user icon at the top right of the screen, to the left of the **<Logout>** button.

Users can select this option to open the *Edit Current User* form, where they can edit their user settings including their contact details. Fields in grey cannot be edited and are supplied by the WASP-MA server.

Change User Password

Users can change their password at the *Edit Current User* form by selecting the Change Password option from the dropdown menu at the top left of the screen.

3.5. Selecting WASP-MA Menu Options

Users can load the various lists by clicking on the relevant option from the main menu bar at the top of the page. For example, choosing the menu item <**Merchant List>** from the **<Merchants>** menu will display the merchant list.

This applies to all the lists, which can be accessed using the specific relevant menu item.

As all the data which is used to populate the lists is stored on the Stratsol server, choosing to load a list will result in the data for the list being loaded from the server. This may take up to a minute depending on traffic to the server, in the meantime a status information text box is displayed which is automatically closed once the relevant list is created.

Users manage the data in the Merchant, User, Client, Report and Transaction Lists through various Forms as described below. Note that there will only be one list or form displayed on the screen at any time.

4. Managing Merchants

WASP-MA provides a full function Merchant Management platform. Users can create, manage and delete merchants using the online portal.

4.1. The Merchant List

The Merchant List displays the details of the user's merchants as stored on the server. This list is automatically loaded from the server once the user logs in and once the merchant data has been received, the Merchant List is displayed. Though this list is automatically loaded at login; the user can reload it at any time by clicking the **<Load>** button on the merchant list page.

This list includes high level details of all the merchants which the user has access to in the form of a 5-column table. The list can be mouse scrolled within the table or by using the scroll bar on the right of the table.

Searching and Sorting the Merchant List

Users can search the contents of the list using the **<Merchant Search>** box; entering any characters in the search box will change the contents of the Merchant List to only show merchant details which include the entered characters.

The Merchant List can be sorted by any of the columns by clicking on that column's header, for example selecting **<Merchant Name>** from the header will sort the list by merchant name in ascending or descending order. The sort direction is shown by an arrow to the right of the relevant column header and can be reversed by clicking on that header.

The number of merchants which conform to the search criteria is displayed at the bottom left of the Merchant List, as is the total number of merchants in the list.

Printing or Saving the Merchant List

The Merchant List can be printed or downloaded using the options on the bottom right of the list. Choosing the **<Print Merchant List>** option will result in a popup being displayed and the list can then be printed to any connected printer or downloaded and saved as a PDF file.

Choosing the **<Download Merchant List>** option will result in the merchant list being downloaded to the user's computer as a Comma Separated Values (CSV) file which can be read using common applications such as Excel and most text editors.

Closing the Merchant List

Close the Merchant List by choosing the option **<✕>** at the top right of the list, this option closes the Merchant List; but does not delete the merchant data loaded from the server. To reload the Merchant List using the most up to date data downloaded from the server, click the **<Load>** button.

4.2. The View/Edit Merchant Form

Clicking on any of the cells in the Merchant List results in the full information for that merchant being loaded from the server, after which the *View/Edit Merchant Form* is displayed. This form can also be accessed from the **<View/Edit Merchant>** option on the **<Merchants>** menu.

The *View/Edit Merchant Form* provides options to access, review, change, copy and delete a merchant's stored information on the My Gateway server.

All the fields on the form marked with a star '*' are required fields and before submitting any changes to the server, these fields need to be completed. The **<Merchant>** field dropdown menu, allows the user to select a specific merchant to view or edit. Any fields with a grey background cannot be changed and the information in these fields is supplied by the server.

Copy Merchant Information

The *View/Edit Merchant Form* includes up to options in the dropdown menu at the top left, one of which is <**Copy Merchant**>.

This option is useful should the user find it necessary to create a new merchant profile for the same merchant. For example, a new merchant may be similar to an existing merchant; but require a different presenting or settlement currency.

Clicking on this icon results in most of the merchant details (including brand fee details; but not presenting currencies) being copied to a new *Add New Merchant Form*, from where a new merchant can be created based on the details copied from the existing merchant. The *Add New Merchant Form* is described below.

Merchant Information

Choosing the <**Merchant Information**> option will open an *Information* message with details of the required information a merchant needs to have to be able to process transactions through the Stratsol payment gateway.

This information includes the **Merchant Abbreviation** (required for various API calls and logging into the portal); the **Merchant ID** (used for payment processing), the **Merchant API Key** and **Merchant Key** (used to access the API calls).

Delete Merchant

Users with the appropriate access privileges and rights can use the <**Delete Merchant**> option to delete the current merchant from the server. Note that once a merchant is deleted from the server, the merchant's details are no longer available, and no transactions can be performed using the merchant's details. The merchant's information will no longer be available in the Merchant List and to manage a merchant with the same or similar details will require the user to create a new merchant.

In many cases it may be preferable to use the **<Merchant Status>** field in the *View/Edit Merchant Form* to change the merchant status to *Terminated* or *Suspended*, rather than delete the merchant entirely.

Promote Merchant

Users with the appropriate access privileges and rights can use the <**Promote Merchant**> option to promote the current merchant from the test platform to the production platform. This option is only available on the test platform and when a merchant is promoted, if the merchant is already live on the production platform its details will be overwritten.

To perform live transactions a merchant will require that their information is loaded onto the production platform and this option is the recommended way to achieve that.

Closing the View/Edit Merchant Form

Clicking the **<X>** button or pressing the **<Esc>** key will close the form and delete any changes the user may have made to the merchant details.

Clicking the minimise form button, **<━>** will close the form while maintaining any changes the user may have made to the merchant information. Changed information will not be submitted to the server for processing; but will be available to the user by loading the *View/Edit Merchant Form* from the **<View/Edit Merchant>** option on the **<Merchants>** menu.

Clicking the **<Save>** button or pressing the **<Enter>** key will result in the form's data being checked for completeness and, if complete, the updated merchant information being sent to the server for processing. The user is informed of the result of the server's attempt to update the merchant details through either a *Warning* message in case of failure, or an *Alert* message in case of a successful update.

4.3. The Create Merchant Form

There are two ways to access the *Create New Merchant Form*, by choosing the *Copy Merchant* option from the *View/Edit Merchant Form*, as described above; or from the **<Create Merchant>** option on the **<Merchants>** menu. In the case of the former, the newly created merchant will normally have the same settlement, currency, naming and billing parameters as the original; while in the latter case a separate merchant will be created from scratch.

The *Create New Merchant Form* provides the user the capability to create a new merchant or suite of merchants on the Stratsol server.

All the fields on the form marked with a star '*' are required fields and before submitting any request to create the merchant, these fields need to be completed. Most of the fields on the form are self-explanatory and all include context sensitive help information; it is important that the fees, banking, contact and other details are correctly entered as this information is used to calculate fees and settle funds to the merchant.

Processing Fees

Processing fees, the percentage of each transaction withheld as service charges, can be differentiated by payment brand or scheme. These fees are entered in the form under the heading **<Processing Service Fees By Payment Type>**, shown below.

The user may select any of the brands/schemes shown in blue and must select at least one payment brand to have processing fees entered. Clicking on a blue payment brand loads the *Payment Brand Processing Fees Popup*, a fixed window displayed in the middle of the screen.

The user can enter the *Processing Service Fee* (MDF), *Currency Conversion Fee* (if applicable) and whether the fees apply to all, or to approved transactions only.

Clicking the **<X>** button will clear the input fields of any data entered and close the window.

Clicking the **<Save>** button or pressing the **<Enter>** key will check the information entered for completeness and, if complete, accept the fees entered and close the window.

Presenting Currencies

International, multi-currency supporting merchants may choose to present payment transactions to the WASP Switch in a variety of different currencies. The specific information associated with each currency is entered in the form under the heading <**Currency Fees & Information**.

Once the user has selected a currency from the **<Presenting Currency>** dropdown menu and configured the currency with the relevant currency information, that currency is presumed to be the currency supported by that merchant.

Closing and Submitting the Add Merchant Form

Clicking the **<X>** button or pressing the **<Esc>** key will close the form and delete any information the user may have entered in the *Create New Merchant Form*.

Clicking the minimise form button, **<━━>** will close the form while maintaining any information the user may have entered to create the merchant. Entered information will not be submitted to the server for processing; but will be available to the user by opening the *Create New Merchant Form* from the **<Create Merchant>** option on the **<Merchants>** menu.

Clicking the **<Submit>** button or pressing the **<Enter>** key will result in the form's data being checked for completeness and, if complete, the entered merchant information being sent to the server for merchant creation. The user is informed of the result of the server's attempt to create the merchant through either a *Warning* message in case of failure, or an *Information* message in case of a successful creation. The *Information* message includes information the merchant will need in order to login to the portal or perform payment transaction.

If the merchant is successfully created the merchant's details are displayed to the user in the *View/Edit Merchant Form*, and a Merchant Admin user is created at the server (see below for more details on creating users). The required login details for the new user are emailed to the user's email address and a password change will be required at first login for the new merchant.

Though the new merchant has been created and the new merchant profile stored at the server, the user can change or delete this information at the displayed *View/Edit Merchant Form*, if required. If no changes are required and the merchant is not to be deleted, the form can be closed by clicking the close form button, **<X>,** the **<Cancel>** button or by pressing the **<Esc>** key.

Merchant Naming Convention

A merchant is created and named **MerchantName(CUR)**, with a Merchant Abbreviation of **MerchantAbbr(CUR)**, where CUR is the international ISO currency code for the configured presenting currency and MerchantName and MerchantAbbr are the user entered Merchant Name and Merchant Abbreviation respectively.

Each of the created merchants is allocated their own unique set of *Merchant Information* (see above under *View/Edit Merchant Form*) used at login, for processing payments at the WASP Switch and for accessing and using the Stratsol API.

5. Managing Users

All users of the WASP Portal with the ability to manage merchants, clients and transactions will have an account on the portal. Users are allocated their access rights when their accounts are created, and each merchant and processor will include users with different access privileges.

5.1. User Access Rights and Roles

Users of the WASP Portal have different privileges on the portal depending on the rights and the role allocated to them at user creation.

Merchant Users

A Merchant User is able to login to the portal and view the merchant details using the Merchant Management functions described above. Merchant Users can also perform the majority of Client and Transaction Management functions described below. However, Merchant Users are not permitted to Manage Users (the functions described in this section) or to create new merchants.

Merchant Users will only be presented with those options to which they are permitted access; however, should a Merchant User attempt a function for which they do not have sufficient access rights, a *Warning* message will be displayed.

Admin Users

Admin Users generally have the capability to perform all the functions available to manage merchants, users, clients and transactions described in this document. However, these functions are limited to managing the users, clients and transactions associated with specific merchants, not all the merchants enabled on the Stratsol server.

The merchants which an Admin User has rights to manage are those included in the Merchant List described above.

Admin Users will only be presented with those options to which they are permitted access; however, should an Admin User attempt a function for which they do not have sufficient access rights, a *Warning* message will be displayed.

5.2. The User List

The User List displays the details of the users allowed access to the merchant data as stored on the server. This list is loaded (and reloaded) from the server by selecting the option **<User List>** from the **<Users>** menu.

This list includes high level details of all the users with access to the current merchant's data in the form of a 4-column table. The list can be mouse scrolled within the table or by using the scroll bar on the right of the table.

Searching and Sorting the User List

Users can search the contents of the list using the **<User Search>** box; entering any characters in the search box will change the contents of the User List to only show user details which include the entered characters.

The User List can be sorted by any of the columns by clicking on that column's header, for example selecting **<User Name>** from the header will sort the list by user name in ascending or descending order. The sort direction is shown by an arrow to the right of the relevant column header and can be reversed by clicking on that header.

The number of users which conform to the search criteria is displayed at the bottom left of the User List, as is the total number of users in the list.

Printing or Saving the User List

The User List can be printed or downloaded using the options on the bottom right of the list. Choosing the **<Print User List>** option will result in a popup being displayed and the list can then be printed to any connected printer or downloaded and saved as a PDF file.

Choosing the **<Download User List>** option will result in the list being downloaded to the user's computer as a Comma Separated Values (CSV) file which can be read using common applications such as Excel and most text editors.

Closing the User List

Close the User List by choosing the <**X**> option at the top right of the list, this option closes the User List; but does not delete the user data loaded from the server. To reload the User List using the most up to date data from the server, choose the **<Load>** option from the User List page.

5.3. The View/Edit User Form

Clicking on any of the cells in the User List results in the full information for that user being displayed in the *View/Edit Users* Form. This form can also be accessed from the **<View/Edit User>** option on the **<Users>** menu.

The *View/Edit User Form* provides options to access, review, change and delete a user's stored information on the My Gateway server.

All the fields on the form marked with a star '*' are required fields and before submitting any changes to the server, these fields need to be completed. The **<User Name>** field allows the user to select a specific user to view or edit. Any fields with a grey background cannot be changed and the information in these fields is supplied by the server.

Delete User

Users with the appropriate access privileges and rights can use the <**Delete User**> option from the dropdown menu to delete the selected user from the server. Note that once a user is deleted from the server, the user's details are no longer available, and the user will no longer have access to the admin portal. To allow the user to access the portal again a new user will need to be created.

Closing the View/Edit User Form

Clicking the <**X**> button or pressing the <**Esc**> key will close the form and delete any changes the user may have made to the selected user's details.

Clicking the minimise form button, <➖> will close the form while maintaining any changes the user may have made to the selected user's information. Changed information will not be submitted to the server for processing; but will be available to the user by loading the *View/Edit User Form* from the <**View/Edit User**> option on the <**Users**> menu.

Clicking the <**Submit**> button or pressing the <**Enter**> key will result in the form's data being checked for completeness and, if complete, the updated user information being sent to the server. The user is informed of the result of the server's attempt to update the user details through either a *Warning* message in case of failure, or an *Alert* message in case of a successful update.

5.4. The Add New User Form

New users are added by selecting the <**Create User**> option on the <**Users**> menu.

The *Create User Form* provides the user the capability to add a new user on the Stratsol server. In addition to the user's contact details, name and user ID (used for logging into the portal) the form allows the user to select the new user's *Access Rights & Roles*, described above.

All the fields on the form marked with a star '*' are required fields and before submitting any request to create the user, these fields need to be completed. Most of the fields on the form are self-explanatory and all include context sensitive help information; it is important that the <**User Role**> field is correctly completed to avoid providing inappropriate privileges to users.

Closing and Submitting the Add User Form

Clicking the <**X**> button or pressing the <**Esc**> key will close the form and delete any information the user may have entered to the *Create User Form.*

Clicking the minimise form button, <➖> will close the form while retaining any information which may have been entered to create the user. Entered information will not be submitted to the server for processing; but will be available to the user by selecting the *Create User Form* option from the <**Create User**> option on the <**Users**> menu.

Clicking the <**Save**> button or pressing the <**Enter**> key will result in the form's data being checked for completeness and, if complete, the entered new user information being sent to the server for processing. The user is informed of the result of the server's attempt to create the user

through either a *Warning* message in case of failure, or an *Information* message in case of a successful creation.

If the user is successfully created the new user's details are displayed to the user in the *New User's Details Form*. The required login details for the new user are emailed to the user's email address and a password change will be required at first login.

Though the new user has been created and the new user profile stored at the server, the user details can changed or deleted from the *New User's Details Form* if required. If no changes are required and the user is not to be deleted, the form can be closed by clicking the close form button, **<X>,** the **<━>** button or by pressing the **<Esc>** key.

6. Managing Clients

The WASP Client Account Management System is designed for merchants and processors who need to manage an on-going relationship with their clients.

6.1. The Client Account Management System

While merchants and processors may provide a client account management system hosted on their own servers; this system provides this service, freeing merchants and processors from the need to manage sensitive client data.

Merchants and processors are provided with a database hosted on the WASP platform. Client information is stored on the WASP database and accessed via the portal.

6.2. The Client List

The Client List displays the details of the clients loaded in the client database management system stored on the server for the current merchant. This list is loaded from the server by selecting the option **<Client List>** from the **<Clients>** menu as shown below.

This list includes high level details of all the merchant's clients in the form of a 5-column table. The list can be mouse scrolled within the table or by using the scroll bar on the right of the table.

Searching and Sorting the Client List

Users can search the contents of the list using the **<Client Search>** box; entering any characters in the search box will change the contents of the Client List to only show client details which include the entered characters.

The Client List can be sorted by any of the columns by clicking on that column's header, for example selecting **<Client ID>** from the header will sort the list by client ID in ascending or descending order. The sort direction is shown by an arrow to the right of the relevant column header and can be reversed by clicking on that header.

The number of clients which conform to the search criteria is displayed at the bottom left of the Client List, as is the total number of clients in the list.

Printing or Saving the Client List

The Client List can be printed or downloaded using the options on the bottom right of the list. Choosing the **<Print Client List>** option will result in a popup being displayed and the list can then be printed to any connected printer or downloaded and saved as a PDF file.

Choosing the **<Download Client List>** option will result in the list being downloaded to the user's computer as a Comma Separated Values (CSV) file which can be read using common applications such as Excel and most text editors.

Closing the Client List

Close the Client List by choosing the option <**X**> at the top right of the list, this option closes the Client List; but does not delete the client data loaded from the server. To reload the Client List with the most up to date data from the server, choose the **<Load>** option from the client list page.

6.3. The View/Edit Client Form

Clicking on any of the cells in the Client List results in the full information for that client being displayed in the *View/Edit Client Form*. This form can also be accessed from the **<View/Edit Client>** option on the **<Clients>** menu, as shown.

The *View/Edit Client Form* provides options to access, review, change and delete a client's stored information on the My Gateway server.

All the fields on the form marked with a star '*' are required fields and before submitting any changes to the server, these fields need to be completed. The **<Client ID>** field allows the user to select a specific client to view or edit. Any fields with a grey background cannot be changed and the information in these fields is supplied by the server.

Delete Client

Users with the appropriate access privileges and rights can use the <**Delete Client**> option from the dropdown menu to delete the selected client from the server. Note that once a client is deleted from the server, the client's details are no longer available, and the client's details will no longer be displayed on the admin portal.

In some cases, it may be preferable to use the **<Blacklist>** checkbox in the *View/Edit Client Form* to change the client status to *Blacklisted*, rather than deleting the client entirely. Blacklisting a client results in that client being unable to perform payment related transactions at their merchant until this restriction is removed; however, the client's details are still stored on the server.

Client Address Entry

The Client Address is entered as a series of separate fields broken down into the address' component parts (e.g. Street Number, Street Name, State etc). These address fields are entered by clicking the *Client Address* label in the *View/Edit Client* form.

Clicking on the *Client Address* label loads the *Client Address Form*, a fixed window displayed in the middle of the screen.

The user can enter the client address fields which are relevant to the client, note that the client address is not mandatory client data.

Clicking the close popup button **<X>** will close the window and preserve any user entered information, allowing the user to return and complete the address fields later.

Clicking the **<Enter>** button or pressing the **<Enter>** key will accept the address entered and close the window.

Closing the View/Edit Client Form

Clicking the **<X>** button or pressing the **<Esc>** key will close the form and delete any changes the user may have made to the selected client's details.

Clicking the minimise form button, **<—>** will close the form while maintaining any changes the user may have made to the selected client's information. Changed information will not be submitted to the server for processing; but will be available to the user by loading the *View/Edit Client Form* from the **<View/Edit Client>** option on the **<Clients>** menu.

Clicking the **<Submit>** button or pressing the **<Enter>** key will result in the form's data being checked for completeness and, if complete, the updated client information being sent to the server. The user is informed of the result of the server's attempt to update the client details through either a *Warning* message in case of failure, or an *Alert* message in case of a successful update.

6.4. The Add New Client Form

New clients are added by selecting the **<Create Client>** option on the **<Clients>** menu.

The *Create Client Form* provides the user the capability to add a new client to the Stratsol server. In addition to the client's contact details, name and user ID, the form allows users to enter the details of up to 3 payment cards, used to expedite payment processing.

The client address is entered using the same process as described above for the *View/Edit Client Form.*

All the fields on the form marked with a star '*' are required fields and before submitting any request to create the client, these fields need to be completed. Most of the fields on the form are self-explanatory and all include context sensitive help information; note that the Client Address field cannot be directly edited as this information is entered in the *Client Address* popup form.

Closing and Submitting the Add Client Form

Clicking the **<X>** button or pressing the **<Esc>** key will close the form and delete any information the user may have entered in the *Create Client Form.*

Clicking the minimise form button, **<—>** will close the form while retaining any information which may have been entered by the user. Entered information will not be submitted to the server for processing; but will be available to the user by opening the *Create Clients Form* option from the **<Create Client>** option on the **<Clients>** menu.

Clicking the **<Submit>** button or pressing the **<Enter>** key will result in the form's data being checked for completeness and, if complete, the user entered information being sent to the server

for processing. The user is informed of the result of the server's attempt to create the client through either a *Warning* message in case of failure, or an *Information* message in case of a successful client creation.

If the client is successfully created the new client's details are displayed to the user in the *New Client's Details Form*. The Gateway ID is a unique token which WASP Switch uses to identify the client in its systems.

Though the new client has been created and the new client profile stored at the server, the client details can be changed or deleted from the *New Client's Details Form* if required. If no changes are required and the client is not to be deleted, the form can be closed by clicking the close form button, **<X>,** the **<Cancel>** button or by pressing the **<Esc>** key.

7. Managing Transactions

Users can view their transaction history, analyse their response codes and refund or cancel transactions from the WASP Portal.

7.1. The Transaction List

The Transaction List displays an overview of the transactions performed by the merchants loaded over the latest transaction cycle, generally between 5 and 10 days. To load transactions from earlier dates, use the *Start Date* and *End Date* fields to specify a date range. This list is loaded with the most up to date data from the server using the **<Load>** button on the transaction list page.

This list includes high level details of all the merchant's transactions in the form of a 9-column table. The list can be mouse scrolled within the table or by using the scroll bar on the right of the table.

Sorting and Searching the Transaction List

Users can search the contents of the list using the **<Order # Search>** box; entering any characters in the search box will change the contents of the Transaction List to only show transaction details which include the entered characters in the **<Order #>** field.

The Transaction List can be sorted by any of the columns by clicking on that column's header, for example selecting **<Merchant>** from the header will sort the list by merchant name in ascending or descending order. The sort direction is shown by an arrow to the right of the relevant column header and can be reversed by clicking on that header.

The list can be searched depending on the user's requirements as described below under *Search Transaction List*.

The number of transactions which conform to the search criteria is displayed at the bottom left of the Transaction List, as is the total number of transactions in the list.

Printing or Saving the Transaction List

The Transaction List can be printed or downloaded using the options on the bottom right of the list. Choosing the **<Print Transaction List>** option will result in a popup being displayed and the list can then be printed to any connected printer or downloaded and saved as a PDF file.

Choosing the **<Download Transaction List>** option will result in the list being downloaded to the user's computer as a Comma Separated Values (CSV) file which can be read using common applications such as Excel and most text editors.

Closing the Transaction List

Close the Transaction List by choosing the <**X**> option at the top right of the list, this option closes the Transaction List; but does not delete the transaction data loaded from the server. To reload the Transaction List using the most up to date data from the server, choose the <**Load**> option from the transaction list page.

7.2. The Transaction Filter Form

Clicking on any of the cells in the Transaction List, except for cells in the Order # column, results in the *Filter Transactions Form* being displayed. This form can also be accessed from the <**Filters**> option.

The *Filter Transactions Form* provides options to search the current Transaction List and create a 'customised Transaction List' based on the filter parameters selected by the user.

The filters which a user can select to refine or customise the Transaction List are

- **Merchants** – a dropdown list; if a merchant name is selected from the list of available merchants in the dropdown list, only that merchant's transactions will be displayed in the customised Transaction List
- **Client ID** - if a client ID is entered in this field only that client's transactions will be displayed in the customised Transaction List
- **Response** – a dropdown list; if a specific transaction response is chosen from the list, only transactions with this response will be displayed in the customised Transaction List
- **Currency** – a dropdown list; if a specific currency is chosen from the list of available currencies, only transactions with that currency will be displayed in the customised Transaction List
- **Transaction Type** – a dropdown list; if a specific transaction type is chosen from the list, only transactions of that type will be displayed in the customised Transaction List
- **Payment Type** - a dropdown list; if a specific payment type (payment brand) is chosen from the list, only transactions of that payment brand will be displayed in the customised Transaction List
- **Amount Low** and **Amount High** – amount fields; if specific amounts are entered in these fields only transactions with values between these amounts will be displayed in the customised Transaction List

Populating the Transaction Search Form

Once the *Filter Transactions Form* has been loaded, it can be populated either by entering the required data into the fields manually or by selecting (clicking on) cells in the Transaction List. The latter is the more efficient way in which to populate the fields in this form; for example with the form open the user click clicked on a merchant in the Transaction List which results in the <**Merchant Name**> field in the form being auto-populated with the merchant name selected. Similarly, the <**Client ID**> and <**Transaction Type**> fields can be auto-populated by selecting the relevant cells in the list. This form is 'draggable' by the header bar and so can be moved to allow access to the Transaction List cells if required.

Note that not all fields need to be completed to perform a transaction search.

The option **<Clear Filters>** from the form's dropdown menu is used clear all the form fields and reload the Transaction List using the last data downloaded from the server without closing the form.

Displaying Transaction Totals

Transaction totals for the currently displayed Transaction List, i.e. those transactions currently displayed in the list, can be requested using the **<Transaction Summary>** option from the dropdown menu in the *Filter Transactions* form. at the bottom left of the list.

Closing the Transaction Search form

Clicking the close form button, **<X>** will close the form while maintaining the data entered in the search fields by. No searches will be performed on the Transaction List and any data entered will be available to the user when the form is reloaded.

Clicking the **<Apply>** button or pressing the **<Enter>** key will result in the form being closed and a search being performed on the Transaction List using the user's desired parameters and a customised Transaction List being displayed. Clearing a field before the search will remove that parameter from the search.

Subsequent requests to print or save the list, or for transaction currency totals will be performed on the customised Transaction List rather than the original list loaded from the server.

7.3. The Transaction Details Form

Clicking on any of the cells in the **<Order #>** column of the Transaction List results in the *Transaction Details Form* being displayed. This is the only way to access this form.

The *Transaction Form* is an information form which provides more detailed information on the transaction selected. While the form has a number of labels and fields, the user is not required to enter any data at this form; all the fields provide additional transaction information and are 'read only' and cannot be changed.

While the form is open (loaded) clicking on any cell in the **<Order #>** column of the Transaction List results in the transaction details for that order being loaded from the server and displayed in the form, overwriting any data in the information fields. The *Transaction Details Form* is 'draggable' by the header bar and so can be moved to allow access to the Transaction List **<Order #>** cells if required.

The Transaction Details List Window

The Stratsol server maintains a rich set of data for each transaction which may be useful for users or merchant operations staff to more thoroughly analyse particular transactions. Clicking on the **<All Transaction Details>** option field in the *Transaction Details Form* provides the user with that information.

Selecting this option results in a new window, the *Transaction Details List Window*, being opened. This window consists of the transaction details list, a 2-column table which contains more information on the selected transaction stored on the server. The information in this window is in the following sections

- **Transaction Details** – all the information relevant to the transaction including amount, currency, response etc
- **Merchant Details** – all the information stored at the server relevant to the merchant at which this transaction was attempted
- **Client Details** – the data stored at the server relevant to the user who performed the transaction
- **Financial Details** – information related to the fees, charges and settlement arrangements for the transaction
- **Gateway Details** – information regarding any third-party gateways who may have been involved in processing the transaction
- **Other Details** – any other relevant information related to the transaction.

Navigate to the top of this window by clicking on the logo at the top left of the page.

The *Transaction Details List* can be printed or downloaded and saved as a PDF file using the **<Print/Save Transaction Details>** option at the top right of the window.

The *Transaction Details List Window* can be closed by choosing the **<Close Transaction Details List>** option or by closing the browser tab or window in the usual way. When closed the user is returned to the main portal screen and the *Transaction Details Form.*

Closing the Transaction Details Form

Clicking the close form button, **<X>**, selecting the **<Close>** button or pressing the **<Esc>** key will close the form and clear the data displayed in the information fields. The form can only be (re)loaded by selecting an **<Order #>** cell from the Transaction List.

7.4. The Transaction Data Analysis Form

Clicking on the **<Transaction Analysis>** option at the bottom of the Transaction List or selecting that option from the <Transactions> menu at the top of the screen results in the *Transaction Data Analysis Form* being displayed.

The *Transaction Data Analysis Form* provides options to analyse and compare merchant transactions.

The Transaction Data Analysis Form Options

This form includes the ability to display the transaction data in graphical form – the type of graph or chart is chosen using the dropdown menu, **<Chart Type>** which provides a range of different line, bar and pie charts.

The data to analyse is chosen using the dropdown, **<Data>** and allows the user the option to choose a variety of parameters, for example to analyse the transaction data by date, volume, response etc.

The **<Measure By>** dropdown indicates whether the transaction data should be analysed by number of transactions or volume.

Selecting the **<Submit>** button results in a new window being opened, in which the relevant chart is displayed representing the data and measure chosen. The transaction data is also displayed in a table at the bottom left of the window.

The data displayed can be printed or downloaded and saved as a PDF file using the **<Print/Save Transaction Analysis>** and can be closed by choosing the **<Close Transaction Analysis >** option or by closing the browser window in the usual way. When closed the user is returned to the main portal screen and the *Transaction Data Analysis Form.*

Closing the Transaction Data Analysis Form

Clicking the close form button, **<X>** or pressing the **<Esc>** key will close the form; the selections in the dropdown menus will not be cleared and will be available to the user when the form is next loaded.

8. Managing Reports

The portal provides merchants and processors with detailed and significant report information. WASP-MA allows users to download, upload and run reports as required.

8.1. The Report List

The Report List displays the details of the reports stored in the Stratsol server database for the selected merchant(s). This list is loaded (and reloaded) from the server using the option **<Report List>** from the **<Reports>** menu.

This list includes high level details of the merchant's available reports in the form of a 4-column table. The list can be mouse scrolled within the table or by using the scroll bar on the right of the table.

Searching and Sorting the Report List

Users can search the contents of the Report List using the **<Report Search>** box; entering any characters in the search box will change the contents of the Report List to only show report details which include the entered characters.

The Report List can be sorted by any of the columns by clicking on that column's header, for example selecting **<Report Name>** from the header will sort the list by report name in ascending or descending order. The sort direction is shown by an arrow to the right of the relevant column header and can be reversed by clicking on that header.

The number of reports which conform to the search criteria is displayed at the bottom left of the Report List, as is the total number of reports in the list.

Closing the Report List

Close the Report List by choosing the **<X>** option at the top right of the list, this option closes the Report List; but does not delete the data loaded from the server. To reload the Report List using the most up to date data from the server, choose the **<Load>** option from the Report List page.

8.2. Downloading Reports

Select reports to download by clicking the required checkboxes in the **<Select Reports>** column of the Report List. Once the user has selected the reports to download click the **<Download [X] Selected Reports>** option at the bottom right of the list.

Choosing the **<Download Report List>** option will result in the list being downloaded to the user's computer as a Comma Separated Values (CSV) file which can be read using common applications such as Excel and most text editors.

8.3. Uploading Files

Reports and other files can be uploaded to the server using the <**Dynamic Reconciliation**> option from the <**Reports**> menu.

Choosing this option results in a standard *Choose File* dialog box being displayed. The user can choose any number of files from this box, after which a Confirm Box is presented requesting the user confirm the files to be uploaded to the server.

Depending on the size and number of files to be uploaded, the upload may take some time to complete. The user is informed of the result of the server's attempt to store the uploaded files through either a *Warning* message in case of failure, or an *Information* message in case of a successful upload.

8.4. Running Reports

Choose the <**Run Reports**> option from the <**Reports**> dropdown menu to run reports for selected merchants. This will load the *Run Reports Form*, from which the user can choose which merchants to run reports for and on which date. Selecting the option to <**Send Emails**> will result in emails confirming the reports have been processed being sent to the registered email address of the merchant(s).

Closing the Run Reports Form

Clicking the close form button, <**X**> or pressing the <**Esc**> key will close the form; the selections in the dropdown menus will not be cleared and will be available to the user when the form is next loaded.

9. Administration Functions

Users with the appropriate level of access rights can use the portal admin functions from the <**Admin**> menu option. These options provide merchant settlement and balance management functions; as well as the ability to manage resellers.

9.1. Settlement and Balance Management

The portal offers 3 functions to manage the merchant balance stored at the gateway server which can be accessed from the <**Admin**> menu.

Adjustment

Clicking on the <**Adjustment**> option results in the *Adjust Merchant Totals Form* being loaded. This function allows the user to adjust a merchant balance if required.

All the fields on the form marked with a star '*' are required fields and before submitting any request to action the adjustment, these fields need to be completed. Most of the fields on the form are self-explanatory and all include context sensitive help information; note that in order to reduce a merchant's balance enter the amount preceded by a minus sign ('-').

Closing and Submitting the Adjust Merchant Totals Form

Clicking the <**X**> button or choosing <**Close**> from the dropdown menu key will close the form and delete any information the user may have entered to the *Adjust Merchant Totals Form*.

Clicking the minimise form button, < —> or choosing <**Minimise**> from the dropdown menu will close the form while retaining any information which may have been entered by the user. Entered information will not be submitted to the server for processing; but will be available to the user by reopening the *Adjust Merchant Totals Form*.

Clicking the <**Submit**> button or pressing the <**Enter**> key will result in the form's data being checked for completeness and, if complete, the user entered information being sent to the server for processing. The user is informed of the result of the server's attempt to action the merchant adjustment through either a *Warning* message in case of failure, or an *Information* message in case of a successful adjustment.

Deposit

Clicking on the <**Deposit**> option results in the *Process Merchant Deposit Form* being loaded. This function allows the user to add funds to a merchant balance if required.

All the fields on the form marked with a star '*' are required fields and before submitting any request to action the deposit, these fields need to be completed. Most of the fields on the form are self-explanatory and all include context sensitive help information.

Closing and Submitting the Process Merchant Deposit Form

Clicking the **<X>** button or choosing **<Close>** from the dropdown menu key will close the form and delete any information the user may have entered to the *Process Merchant Deposit Form*.

Clicking the minimise form button, **< —>** or choosing <**Minimise**> from the dropdown menu will close the form while retaining any information which may have been entered by the user. Entered information will not be submitted to the server for processing; but will be available to the user by reopening the *Process Merchant Deposit Form*.

Clicking the **<Submit>** button or pressing the **<Enter>** key will result in the form's data being checked for completeness and, if complete, the user entered information being sent to the server for processing. The user is informed of the result of the server's attempt to action the merchant deposit through either a *Warning* message in case of failure, or an *Information* message in case of a successful withdrawal.

Withdrawal

Clicking on the <**Withdrawal**> option results in the *Process Merchant Withdrawal Form* being loaded. This function allows the user to reduce a merchant balance if required.

All the fields on the form marked with a star '*' are required fields and before submitting any request to action the withdrawal, these fields need to be completed. Most of the fields on the form are self-explanatory and all include context sensitive help information.

Closing and Submitting the Process Merchant Withdrawal Form

Clicking the **<X>** button or choosing **<Close>** from the dropdown menu key will close the form and delete any information the user may have entered to the *Process Merchant Withdrawal Form*.

Clicking the minimise form button, **< —>** or choosing <**Minimise**> from the dropdown menu will close the form while retaining any information which may have been entered by the user. Entered information will not be submitted to the server for processing; but will be available to the user by reopening the *Process Merchant Withdrawal Form*.

Clicking the **<Submit>** button or pressing the **<Enter>** key will result in the form's data being checked for completeness and, if complete, the user entered information being sent to the server for processing. The user is informed of the result of the server's attempt to action the merchant withdrawal through either a *Warning* message in case of failure, or an *Information* message in case of a successful withdrawal.

9.2. Managing Resellers

Merchants, third party processors and acquirers may employ Resellers, and the portal provides the ability to manage resellers through the <**Admin**> menu, as shown.

View/Edit Reseller Details

The *View/Edit Resellers Form* is accessed from the **<View/Edit Resellers>** option on the **<Admin>** menu.

The *View/Edit Resellers Form* provides options to access, review, change and delete a reseller's stored information on the My Gateway server.

All the fields on the form marked with a star '*' are required fields and before submitting any changes to the server, these fields need to be completed. The **<Reseller Name>** field allows the user to select a specific reseller to view or edit. Any fields with a grey background cannot be changed and the information in these fields is supplied by the server.

Delete Reseller

Users with the appropriate access privileges and rights can use the <**Delete Reseller**> option from the dropdown menu to delete the selected reseller from the server. Note that once a reseller is deleted from the server, the reseller's details are no longer available.

Copy Reseller Information

The *View/Edit Reseller Form* includes a <**Copy Reseller**> option at the dropdown menu.

This option is useful should the user find it necessary to create a new reseller with substantially the same details as an existing reseller.

Clicking on this icon results in reseller details being copied to a new *Create Reseller Form*, from where a new reseller can be created based on the details copied from the existing reseller. The *Create Reseller Form* is described below.

Closing the View/Edit Reseller Form

Clicking the **<X>** button or choosing **<Close>** from the dropdown menu key will close the form and delete any changes the user may have made to the selected reseller's details.

Clicking the minimise form button, **< —>** or choosing <**Minimise**> from the dropdown menu will close the form while retaining any information which may have been entered by the user. Entered information will not be submitted to the server for processing; but will be available to the user by reopening the *View/Edit Reseller Form* from the **<View/Edit Reseller>** option on the **<Admin>** menu.

Clicking the **<Save>** button or pressing the **<Enter>** key will result in the form's data being checked for completeness and, if complete, the updated reseller information being sent to the server. The user is informed of the result of the server's attempt to update the reseller details through either a *Warning* message in case of failure, or an *Alert* message in case of a successful update.

The Create Reseller Form

New resellers are added by selecting the **<Create Reseller>** option on the **<Admin>** menu.

The *Create Reseller Form* provides the user the capability to add a new reseller to the Stratsol server. In addition to the reseller's contact details, the form allows users to enter commercial information for the reseller.

All the fields on the form marked with a star '*' are required fields and before submitting any request to create the reseller, these fields need to be completed. Most of the fields on the form are self-explanatory and all include context sensitive help information.

Closing and Submitting the Create Reseller Form

Clicking the **<X>** button or choosing **<Close>** from the dropdown menu key will close the form and delete any information the user may have entered to the *Create Reseller Form.*

Clicking the minimise form button, < —> or choosing <**Minimise**> from the dropdown menu will close the form while retaining any information which may have been entered by the user. Entered information will not be submitted to the server for processing; but will be available to the user by reopening the *Create Reseller Form* option from the **<Add Reseller>** option on the **<Admin>** menu.

Clicking the **<Save>** button or pressing the **<Enter>** key will result in the form's data being checked for completeness and, if complete, the user entered information being sent to the server for processing. The user is informed of the result of the server's attempt to create the reseller through either a *Warning* message in case of failure, or an *Information* message in case of a successful update.

Though the new reseller has been created and the new reseller profile stored at the server, the reseller details can be changed or deleted from the *New Reseller's Details Form* if required. If no changes are required and the reseller is not to be deleted, the form can be closed by clicking the close form button, **<X>,** the **<—>** button or by pressing the **<Esc>** key.

10. Documentation

To provide access to required documentation for a merchant, acquirer, processor or reseller to get started with the platform, the WASP Portal allows users to download the required documents. This information is available from the **<Documentation>** menu, choosing an option from this menu results in the relevant document being loaded into a new browser tab or window from where it can be downloaded and saved in PDF format.

10.1. Supporting Documents

The documentation currently available includes

- **Onboarding Guide** - serves as a 'getting started' manual, similar to a checklist of actions, to ensure that new users of the gateway are able to most efficiently implement and begin using the platform
- **Portal User Guide** – this document
- **Product Services Guide** – provides the API and other technical information required to connect to the gateway
- **Using Chinese Payments** – provides the merchants and their customers detailed FAQs on using their cards at the merchant site.

10.2. Sample Source Code

To assist implementation the WASP Portal provides users customised, downloadable sample source code. Selecting the <**Sample Code**> option from the <**Documentation**> menu opens the *Payment Transaction Sample Code* window.

Select a merchant from the <**Select Merchant**> dropdown menu, which will auto fill the JavaScript configuration file *demo_payment_config.js* window with the merchant's details. Download the sample source code files *demo_payment_config.js* and *demo_payment.html* using the <Save Config/Application File> options.

To run the source code; save both files to the same directory and execute the *demo_payment.html* file.

These files can be edited using most text editors and the relevant API calls copied and pasted if required.

Close the *Payment Transaction Sample Code* window using the browser back button or by choosing any other option from the main menu.

11. Help

Context sensitive help is available by hovering over most buttons, menu items and objects on this portal. Online, searchable help and documentation is available from the <**Online Documentation>** option, under the <**Help**> menu.

The best information on using the WASP Portal is available in this guide and it is suggested that users read this document in conjunction with using the portal.

Users can click on the **<Contact Us>** option under the **<Help>** menu to automatically generate an email from their preferred email address to the portal support team. The email body should include the user's

- *Merchant Name as registered with Stratsol*
- *User Name as registered with Stratsol*
- *Email Address*
- *An alternative contact method (messenger or phone)*
- *Description of the support required*

Depending on the severity of the issue, the user may be allocated a support ticket and Stratsol will attempt to resolve any problem or provide any information as soon as practical.