



Data collection form

Back Office user manual

Document version 1.7

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1. HISTORY OF THE DOCUMENT

Version	Author	Date	Comment
1.8	La Banque Postale	7/27/2020	<ul style="list-style-type: none">• Additional information regarding field configuration in Building the form.• Additional information regarding extra info. fields in Configuring a field.
1.7	La Banque Postale	6/16/2020	<ul style="list-style-type: none">• Additional information regarding the currency in Building the form.• Update of the Personalizing your privacy policy chapter.
1.6	La Banque Postale	2/25/2020	<ul style="list-style-type: none">• Chapter reorganization.• Additional information in Configuring the form.• Addition of the chapter Personalizing your privacy policy.• Addition of the chapter Editing a form in production.
1.5	La Banque Postale	8/30/2019	Initial version

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2. PRESENTATION OF THE SERVICE

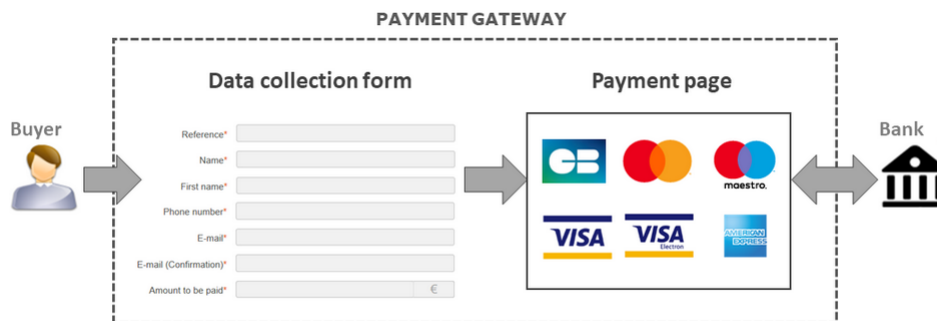
The payment gateway provides its clients with the **Data collection form** service.

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

The principle is simple:

- The payment gateway provides you with a data collection form hosting service.
You build your data collection form by inserting as many fields as you wish with all the functionalities of a form (mandatory, optional and pre-filled fields, etc.).
- Your client uses this form to enter the amount of their transaction and personal details (first and last name, address, etc.).
- After the client has validated the form and accepted the privacy policy, they are automatically redirected to the payment page.
- The client makes an online payment.

The form can only be used with one currency.



The process of implementing **Data collection form** is very simple. There is no need to have any knowledge about development or technical skills.

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

- In your Merchant Back Office (to be done only the first time or if the form is updated in production)
 - Step 1: make the necessary configurations for the form.
 - Step 2: request to upload your form online.

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

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

Notes

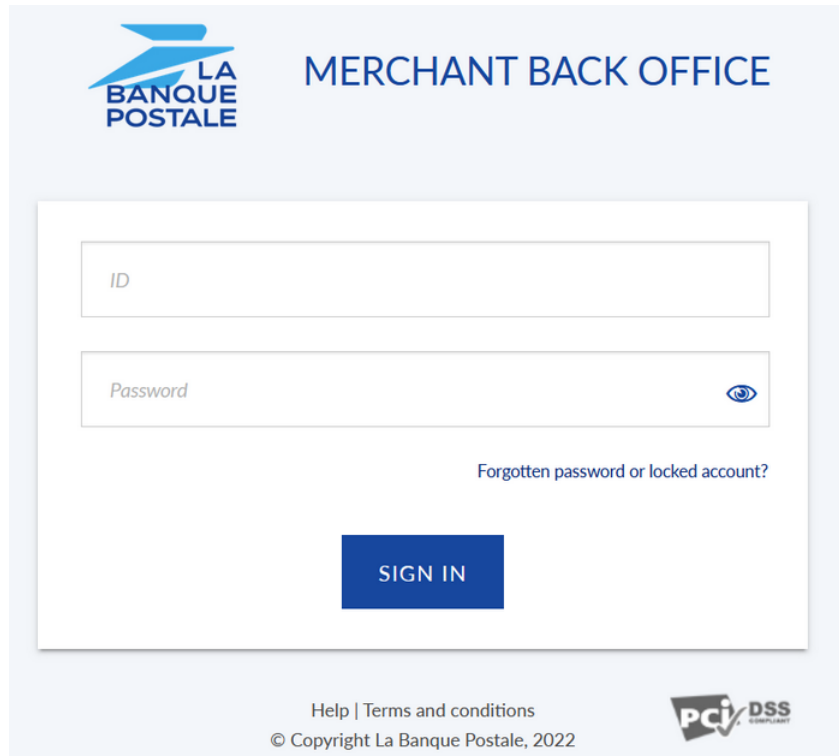
This document provides information only on configuring and using the collection form. For information on:

- *Personalizing your logo on payment pages and in buyer e-mails, see the **Shop logo customization** user manual.*
- *Managing payment orders by e-mail, see the **Payment orders** user manual.*
- *Manual payments, see the **MOTO payment** user manual.*
- *Managing your Back Office, see the **Transaction management** user manual.*

3. SIGNING IN TO MERCHANT BACK OFFICE

Sign in to the Back Office:

<https://scelliuspaiement.labanquepostale.fr/vads-merchant/>



The screenshot shows the login interface for the Merchant Back Office. At the top left is the La Banque Postale logo. To its right, the text 'MERCHANT BACK OFFICE' is displayed. Below the logo and title is a white login form with two input fields: 'ID' and 'Password'. The 'Password' field includes a toggle icon for visibility. Below the password field is a link that reads 'Forgotten password or locked account?'. A blue 'SIGN IN' button is centered below the form. At the bottom of the page, there is a footer with the text 'Help | Terms and conditions' and '© Copyright La Banque Postale, 2022', along with a PCI DSS logo.

1. Enter your login.

The login is sent to the merchant's e-mail address (the subject of the e-mail is **Connection identifiers- [your shop name]**).

2. Enter your password.

The password is sent to the merchant's e-mail address (the subject of the e-mail is **Connection identifiers- [your shop name]**).

3. Click Sign in.

After 3 password entry errors, the user's account is locked. Click on the link **Forgotten password or locked account** to reset it.

4. CONFIGURING THE FORM

To access form configuration

1. Go to **Management > Configuration of the TEST data collection form**
2. Select your shop

There are different tabs for configuration:

- **Settings**
- **Privacy policy**
- **Form management**

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

IMPORTANT

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

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

For more information, see chapter [Editing a form in production](#) on page 17.

4.1. Personalizing the form

In the **Settings** tab:

Settings Privacy Policy Form management

Main

Form name: [text field]

Introduction: Tahoma [font dropdown] [B] [I] [U] [A] [A] [color] [background color] [bullets] [list] [link] [unlink] [undo] [redo]

Address: [text field]

ZIP code: [text field]

City: [text field]

Contact phone number: [text field]

Contact e-mail: [text field]

Shop return URL: http:// [dropdown] [text field] [eye icon]

Closed:

Date of availability*: 27/06/2019 [calendar icon]

Save Open the form

1. Customize the **Introduction**.
 2. Change the font, if needed, by choosing another one from the list.
 3. Personalize the layout of the text, if you wish, using the icons (alignment, bold, italic, underline, bullet points, etc.)
 4. Click the **Source code** button to display the HTML code if you prefer to work in html tag mode.
 5. Enter the shop contact details (exact address, phone number, e-mail).
Usually the contact details of the data protection officer in your company.
 6. Enter the URL for returning to the shop.
You can test the web address by clicking the **Eye** icon.
This URL will be used on the payment pages for returning to the shop.
 7. Check the **Closed** box if you would like to make your website inaccessible.
This box defines whether the form is currently accessible online or not.
- Note**
- If closed, the website displays the following message:*
- This online payment service is temporarily unavailable as requested by the organization that you intend to pay.*
8. Enter the **Date of availability** of the form.
While the website is closed, this date allows to program the date of reopening the website in advance.
 9. Click **Save**.
The confirmation message **Your changes were saved successfully** appears.
 10. Click **Open the form** to view the result of the configuration.

4.2. Personalizing your privacy policy

Settings Privacy Policy Form management

General

In accordance with the applicable regulations, you will find below the mandatory information relating to the collection of personal data by form.

[Personalize your privacy policy](#)

The information provided in this form is recorded by [identity and contact details of the controller -> Merchant name and postal address] to collect the required client information, subject to their consent, in particular to carry out the reconciliation of the payment transaction.

In addition to the Merchant, the collected data will be shared only with the following recipients: service providers and technical partners.

The data is stored for a period of fifteen months.

You have the right to access, rectify, delete, oppose and limit processing. You may request portability of the data you have provided that are required for the contract or processing to which you have consented. You may at any time withdraw your consent.

To exercise these rights or for more information about the processing of your data, you may contact the Data

Remaining number of characters: 874

%shopname%
%companyname%
%shopurl%

Save Preview

According to the GDPR (General Data Protection Regulation) law, this tab is provided to inform buyers about the collection and conservation of their personal data.

It is mandatory to mention this information and you are responsible for bringing it to the Buyer's attention.

You are provided with a customizable template that contains an overview of the applicable regulations.

To customize the template:

1. Click **Personalize your privacy policy**.

The page of the template becomes editable.

The number of characters is limited. The remaining number of characters appears at the bottom of the page.

2. Personalize the desired content.

We remind you that the suggested template contains an overview of the applicable regulations.

In any case, La Banque Postale will help you to check the consistency of your template before the form is uploaded online.

For more information, contact the E-Banking Merchant Support Service.

- Replace the details between brackets by required information and delete the brackets.
 - **[identity and contact details of the data controller -> Merchant's name and postal address]**
This information concerns the identity and contact information of the Merchant or the company that collects and processes data.
 - **[e-mail or postal address or phone contact details allowing the end customer to exercise their rights]**
It must contain the exact coordinates of the person and/or service that the client could contact on the merchant side, if necessary, within the framework of their data protection.
- Add the information making sure to respect the character number limit.
 - Copy and paste the **%shopname%** reference if you would like to automatically add your shop name to a phrase.

- Copy and paste the **%companyname%** reference if you would like to automatically add your company name to a phrase.
- Copy and paste the **%shopurl%** reference if you would like to automatically add your shop URL to a phrase.
- Copy and paste the **%companymail%** reference if you would like to automatically add your company e-mail address to a phrase.
- Add any other information and/or reformulate sentences, if you wish.

Since the template is an GDPR content model, you are free to rewrite and/or replace all its contents, if you wish. However, La Banque Postale reserves the right to check its consistency and contents before uploading it online.

3. Personalize the formatting, if needed.

An icon bar is provided for applying a number of styles.

If you position the cursor on an icon, a tooltip will appear informing you about the role of this style icon.

For example, you can change the text font, the color, use bold text or underline certain sentences, etc.

4. Preview your page by clicking the **Preview** button.

5. Click the **Save** button to save the changes.

At any moment, you can click **Restore default privacy policy** to go back to the template provided by the gateway.

4.3. Building the form

The screenshot shows the 'Form management' interface with three main sections:

- List of available fields:** A list containing 'City', 'Accompanying message', and 'Buyer reference'. 'City' is selected.
- Configuration of the selected field:** A 'General' tab with the following settings:
 - Name displayed *: City
 - Type of field *: String
 - Pop-up info: Buyer city
 - Minimum length: (empty)
 - Maximum length: 255
 - Field to be confirmed:
 - GET parameter: vads_cust_city
- Build the form:** A table of field types:

Required fields	
Title	Drop-down list
First name	String
Name	String
E-mail	E-mail address
Montant à régler	Amount
Reference	String
Optional fields	
Mobile phone	String
Phone number	String
Address	Entry field
ZIP code	String
State	String

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

- **List of available fields**

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

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

The screenshot shows the 'Form management' interface with the 'Info 1' field selected:

- List of available fields:** A list containing 'Info 1', 'Info 2', and 'Info 3'. 'Info 1' is selected.
- Configuration of the selected field:** A 'General' tab with the following settings:
 - Name displayed *: Info 1
 - Type of field *: String
 - Pop-up info: Info 1
 - Minimum length: (empty)
 - Maximum length: (empty)
 - Field to be confirmed:
 - GET parameter: vads_order_info

IMPORTANT

The fields available by default (Title, Last name, First name, Address, etc.) are displayed by default in the language of the shop.

If you wish to change the display language of these fields, contact the E-Banking Merchant Support Service.

- **Configuration of the selected field**

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

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

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

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

IMPORTANT

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

- **Build the form**

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

- Required fields: to confirm the purchase, the Buyer must fill in these fields which will be marked with an asterisk (*) in the payment form.
- Optional fields: they are displayed in the payment form but the buyer does not have to fill them out.

4.3.1. Configuring a field

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

To configure a field:

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

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

2. Make the desired changes.

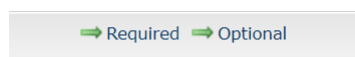
Example of configuration of a default field:

The screenshot shows a two-pane interface. The left pane, titled 'List of available fields', contains a list of fields: State, Phone number, Address (highlighted), Name, City, Title, Buyer reference, E-mail, First name, Mobile phone, and Accompanying message. The right pane, titled 'Configuration of the selected field', shows the configuration for the 'Address' field. It includes a 'General' section with the following settings: 'Name displayed *' is 'Address', 'Type of field *' is 'Entry field', 'Pop-up info' is 'Buyer address', 'Minimum length' is '1', 'Maximum length' is '80', 'Field to be confirmed' is an unchecked checkbox, and 'GET parameter' is 'vads_cust_address'.

- Customize the text of the **Tooltip**.
The tooltip is the information displayed when the cursor hovers over an element that helps the Buyer when filling in information.
- In **Minimum length**, redefine the minimal number of characters.
- In **Maximum length**, redefine the maximal number of characters.
- Select the **Field to confirm** checkbox if you want the buyer to confirm the entry of the field value.
For instance, enter an e-mail and confirm the entry in another field to make sure that the specified address is valid.

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

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



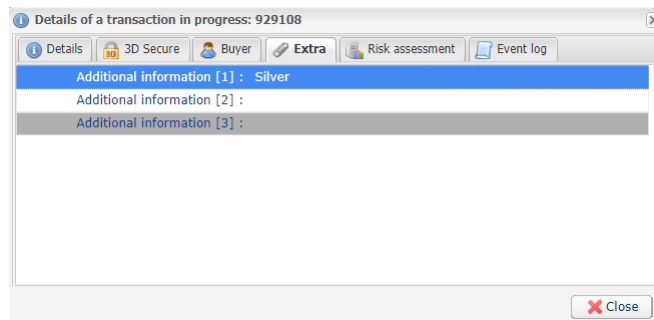
Note

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

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

To view the details of a transaction:

1. Select the transaction
2. Right click and select **Display transaction details**.
3. Click **Extras** to view the new field.






In this example, the merchant renamed the **Info 1** field to "**Product color**" when building the form. The buyer entered **Silver** in the purchase form.

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

4.3.2. Organizing the form display

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

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

To organize the form display:

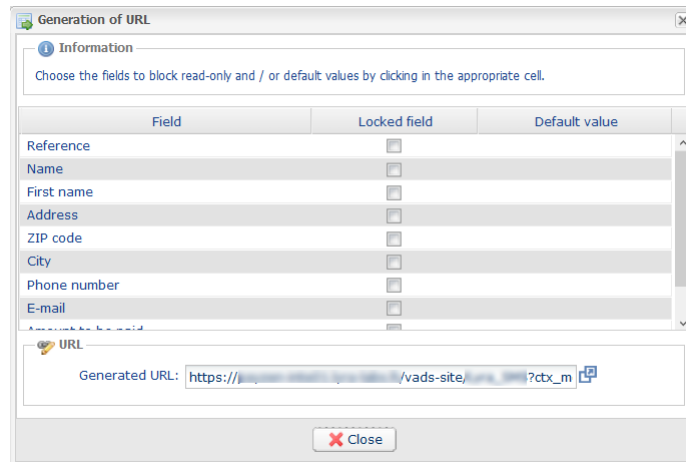
1. Select the field of your choice.
2. Use the **Move up** and **Move down** buttons for choosing the position of the fields in the form.
3. Use the **Remove** button for deleting a form field or for placing it among the required or optional fields.
4. Click **Save**.
The confirmation message **Your changes were saved successfully** appears.
5. Click **Open the form** to view the result of the configuration.

5. GENERATING A URL

The Merchant has the possibility to pre-fill a data collection form and generate a URL for accessing this form. The Merchant locks one or more fields and enters the values that they wish to display by default in this form.

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

The URL generation page appears



Field	Locked field	Default value
Reference	<input type="checkbox"/>	
Name	<input type="checkbox"/>	
First name	<input type="checkbox"/>	
Address	<input type="checkbox"/>	
ZIP code	<input type="checkbox"/>	
City	<input type="checkbox"/>	
Phone number	<input type="checkbox"/>	
E-mail	<input type="checkbox"/>	

Generated URL: https://.../vads-site/...?ctx_m...

2. Select one or several fields that you wish to lock by checking the corresponding box.
3. Click the corresponding **Default value** field and enter the desired value.

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

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

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

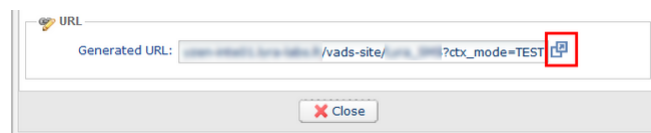
Example:

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

4. Your pre-filled link is ready.

Two ways of retrieving the value of the URL:

- Select and copy the value of the URL in the **generated URL** field.
- Or click the **Open the link in a new window** icon.



The generated URL appears on a web page.

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

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

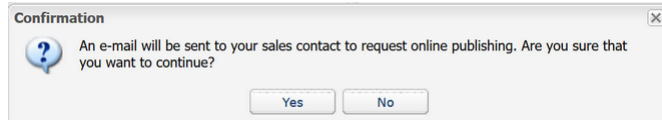
6. REQUESTING FOR YOUR FORM TO BE UPLOADED ONLINE

Once the configuration process is complete, you can request to upload your form online.

1. In the **Form management** tab, click the **Request online publishing** button at the bottom of the page.



The information message appears.




In case of confirmation, an e-mail will be sent to the sales contact of the company linked to your shop. This contact will handle the request to upload the form online.

For more information on this contact, contact the E-Banking Merchant Support Service.

2. Click **Yes**.

The shift to production mode requires a prior approval. You will be notified as soon as it is published online.

Note

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


7. EDITING A FORM IN PRODUCTION

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

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

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

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

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



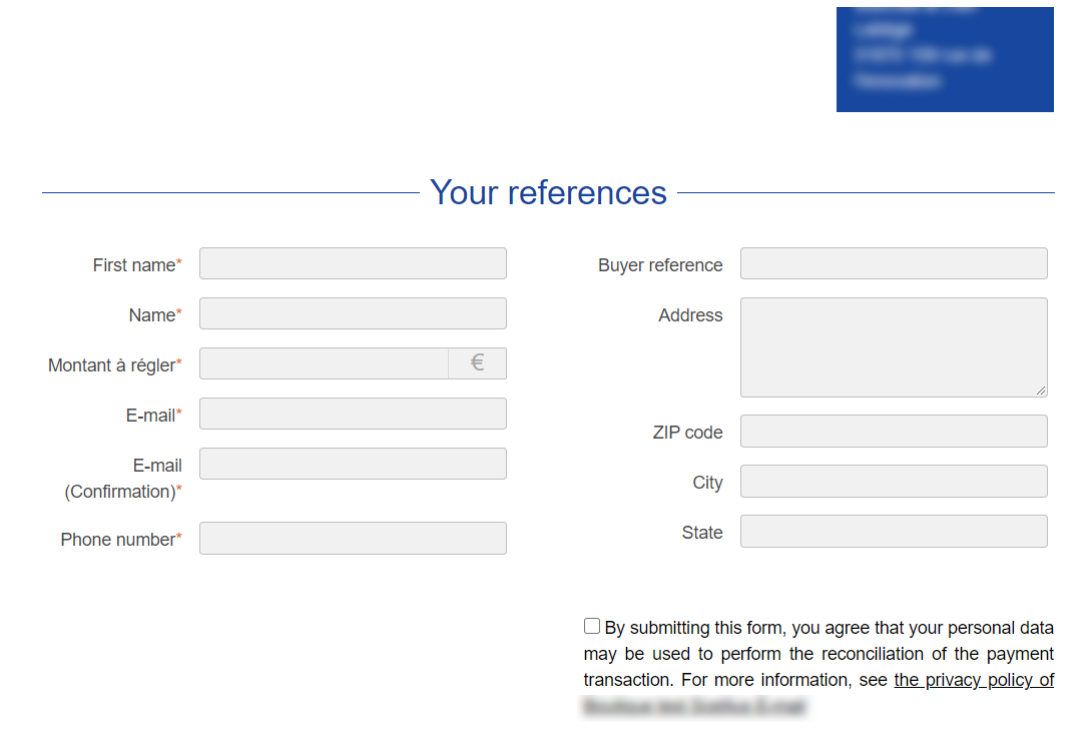
2. Edit your test form.

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

8. SENDING THE FORM TO THE BUYER

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

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



The image shows a screenshot of a payment form titled "Your references". At the top right, there is a blue rectangular button with a white icon. Below the title, the form is organized into two columns of input fields. The left column includes: "First name*" (text box), "Name*" (text box), "Montant à régler*" (text box with a Euro symbol € on the right), "E-mail*" (text box), "E-mail (Confirmation)*" (text box), and "Phone number*" (text box). The right column includes: "Buyer reference" (text box), "Address" (large text area), "ZIP code" (text box), "City" (text box), and "State" (text box). At the bottom right of the form, there is a checkbox with the text: "By submitting this form, you agree that your personal data may be used to perform the reconciliation of the payment transaction. For more information, see [the privacy policy of](#)".

Figure 1: Example of a form

Note

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

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

9. OBTAINING HELP

Looking for help? Check our FAQ on our website

<https://scelliuspaiement.labanquepostale.fr/doc/en-EN/faq/sitemap.html>

For any technical inquiries or if you need any help, contact [technical support](#).

In view of facilitating the processing of your requests, please specify your shop ID (an 8-digit number) in your query

This information is available in the “registration of your shop” e-mail or in the Merchant Back Office (**Settings > Shop > Configuration**).