worldpay
from FIS

Corporate Gateway

Mail and Telephone Order Payment Service (Hosted Call Center) Guide

v4.5 September 2023

Contents

1 Introduction

The Mail and Telephone Order Payment service application (Hosted Call Center) enables a merchant's Call Center to connect to our payment service, without having to integrate their system with the payment service. In this respect the Hosted Call Center Application is different from Call Center solutions that use any of the other service models to process payments.

The Hosted Call Center is compatible with Visa Direct Fast Funds.

worldpay
from FIS

2 How does the Hosted Call Center application work?

You enter order and payment information in the Hosted Call Center application and submit it to the payment service. When we have processed a payment you are notified of the result. The result can also be sent directly to the shopper from the payment system by email, if required.

Order and payment information is submitted through the application as follows:

1. The Call Center operator logs on to the Hosted Call Center application on our system.

2. The shopper calls the Call Center to place the order.

3. The operator enters the order number, description, amount and currency, then creates the order.

4. The operator selects the payment method and enters the shopper payment information.

5. We send the information to the financial institutions for authorisation.

6. The results are displayed to the operator in the Hosted Call Center application.

7. The operator is returned to the order entry page of the Hosted Call Center application.

For the standard Hosted Call Center application, you can only offer payment methods that do not need an interaction with the shopper. In practice that means credit and debit cards only.

2.1 Accessing the Hosted Call Center application

1. Use your web browser to log on to the Hosted Call Center application with this URL: https://secure.worldpay.com/merchant/callCenter/index.html.

   A secure HTTPS connection is established.

2. Enter your username and password.

2.2 Creating the order

Once you have logged on, the **pay new order** dialog appears.

Enter the order code, an optional order description, the currency and amount, and an optional shopper email address.

> **Note:** The shopper email address field is visible if it has been activated for your account. The available currencies depend on your contract.

2.2.1 New order

There are two ways to generate the order codes for orders processed through the Hosted Call Center application:

1. Your back office system generates order codes. The order code can either be:

   Typed in the Order code field

   Appended to the Call Center URL
   For more information, see Importing order details.

2. The Worldpay system automatically generates order codes; this ensures they are unique. This auto-generation has to be activated for your account. You should make sure that there is a connection between the order codes generated by us and your back office and logistical systems.

The order description field can be filled in automatically for you with a fixed text, your Call Center phone number, the order code, or a combination of these. Please contact support: https://www.fisglobal.com/en-gb/merchant-solutions-worldpay/support to have this feature configured for your account.

If it is configured you may see the parameter names ${phoneNumber} or ${orderCode} in the description field when creating an order. These parameters are automatically replaced by their value after the order is submitted to the payment service.

A **Reset** button is available to clear the form. Click the **Pay** button at the bottom of the dialog to submit the order to the payment service. A payment selection dialog appears, as described below.

2.2.2 Existing order

1. Click the **Pay existing order** menu item, to the left of the screen. The **Pay an existing order form** displays.
This form is used for existing orders that have been created, but for which no payment details have been submitted to the Payment service.

2. Enter the existing order code and click the **Pay** button. The payment selection screen appears.

2.2.3 Shopper payment result email

If you enter the shopper email address in the **Customer email address** field, an automatically generated email can be sent to the shopper with the result of the payment, after it has been processed. This feature, known as the shopper email protocol, is activated as follows:

1. In the MAI, select the **Integration** menu item, then select **Merchant Channel**.

2. You'll see the **Merchant Channels (Production)** and **Merchant Channels (Test)** sections. This is where you'll see the shopper email protocol. If you click, **Configure Authorized** or **Configure Refused**, you'll be able to change the email text.
For more information, please refer to the Merchant Admin Interface Guide.

2.3 Creating the payment

In the Payment Method Selection dialog there is a list of available payment methods. These depend upon your contract details. At the bottom of the dialog you can select the applicable country and language.

> **Note:** The available payment methods and their descriptions also depend on the selected (shopper) country.

1. Choose the payment method the shopper wants to use for paying the order.

2. Enter the payment details for the order.
The order code, description and order amount display at the top of the dialog. If the currency used to pay the order is different from the currency you will receive in your bank account (the settlement currency), an entry displays the order currency converted to the settlement currency.

3.   Enter the payment details from the shopper In the Payment Details dialog, for example:

Card number

Expiry date

Cardholder name and, depending on your contract, the address data of the cardholder and Card Verification Code (CVC).

4.   Click **Submit** at the bottom of the screen to submit the payment details to the Payment service.

Note: For extra security, Worldpay offers a card number masking feature on hosted payment pages. See the Hosted Payment Pages (HPP) guide for details.

2.4 Authorisation of the payment

After you submit the payment details, we contact the appropriate financial institution for authorisation.

The payment status, which can either be AUTHORISED or REFUSED, displays automatically in a result window

Select the link to go back to the order entry dialog to create the next order

2.5 Branding the call Center interface

The Hosted Call Center interface can be branded with your company logo.

If you supply us with the logo in *.png format, the Call Center interface can be configured to display the logo in the top right corner.

3 Sending an email with payment instructions

You can offer all of the available payment methods for your account to shoppers.

To do this, configure the Hosted Call Center application to send the shopper an email with payment instructions. Ask your Worldpay Implementation Manager to do this, or contact your Worldpay Relationship Manager.

The email shows the shopper how to use the Worldpay Payment Method Selection dialog to create the payment.

> **Note:** To enable this e-mail functionality, ask your Worldpay Implementation Manager.

The steps to send payment instructions through the Hosted Call Center application are:

1.   The Call Center operator logs on to the Hosted Call Center application.

2.   The shopper calls the Call Center to place the order.

3.   The operator enters the required data:

> Order number
>
> Description
>
> Amount
>
> Currency
>
> Shopper name
>
> Shopper email address

4.   The operator sends an email to the shopper and creates the order in the Worldpay Payment service.

5.   The shopper clicks the link in the email to go to the Worldpay Payment Method Selection page.

> **Note:** The shopper must complete the payment within three days or the payment link expires.

6.   The shopper selects a payment method and enters the relevant payment information in the dialog.

7.   Worldpay send the payment information to the financial institutions for authorisation.

8.   The shopper is informed about the result of the payment.

To be able to send an email with payment instructions to the shopper, you must define and store one or more corresponding email templates. This is done using the Merchant Admin Interface.

3.1 Creating email templates in the Merchant Admin Interface

You can define templates for Emails with payment instructions in multiple languages, in the Merchant Admin Interface (MAI).

1.   Log on to the MAI and select **Account** from the menu.

2.   Go to the **Profile** section.

3.   Under the Call Center Properties section, click the pencil next to **Edit Call Center email message**. You'll be taken to the **Edit Shopper Message** page.

4. Select a language to open the corresponding email template frame.
   The template frame contains the following fields:

Field:	Meaning:
MerchantCode	This shows your merchant code in our system.
Language	This shows the selected language for this template.
Reply address	The email address that is shown as the sender address in the email. You must fill in the email address where you wish to receive shopper email replies.
Subject	The subject of the email. A default subject line in English is provided.
Format	You can use HTML in your email message. However, not all email programs support rich email (with HTML). You can decide to use rich email (text/html) or just plain text (text/plain). When you use HTML in your message do not use the `<html>`, `<` and `<body>` `>` tags. We put those tags in your message for you.
Message body	The email message to be sent to the shopper with the payment instructions. A default message in English is provided. Note the following mandatory tags:
	`&ordercode;` - The order code as created by you or your system `&orderid;` - Our order identification (payment reference) `&amount;` - The current and amount for this order `&paymentselecturl;` - The URL that the shopper has to visit to complete the payment.
	You can also include the optional tag `&description;` This will be substituted with the order description originally entered by you in the Hosted Call Center interface. **Note:** When the parameters `${phoneNumber}` or `${orderCode}` are used to generate an order description automatically, the full parameter name will appear in the email, because the order has not yet been submitted when the email is sent. Please refer to Creating the Order.

5. Click **Save Message** to store the new template in the Worldpay system.

Before you can use the email with payment instruction feature in the Hosted Call Center application, you must first create and save at least one email template.

You can create a separate email template for any of the countries that are listed when you click the **Edit Call Center email message** icon in the **Profile** page.

3.2 Creating the order

In the Hosted Call Center application:

1. Select **e-mail new order** from the menu on the left side of the screen.

2. Enter the order code, an optional order description, the currency and amount in the displayed dialog.

3. Enter the name and email address of the shopper and select the email language.
   For an email language to be available, you must create an appropriate email template in the MAI.
   You can generate the order codes yourself or have them generated by the Worldpay system. For more details, see Creating the order.

4. Click **Send email**. The order is submitted to Worldpay and an email with the payment instructions is sent to the shopper. The message content is automatically shown to you in the Call Center interface.

It is not possible to set an expiry date or a timeout for the URL (an order). Orders are valid for three days, after which the link becomes non-payable. If the shopper accesses the link, but leaves the order page before making the payment, they can come back and complete it within the three days as long as they do so from the same IP address.

3.3 Payment authorisation

The email sent to the shopper contains a link that directs them to our Payment Method Selection page. Here the shopper:

- Selects one of the available payment methods
- Completes the payment details
- Submits the payment

> **Note:** Credit/debit cards are the only payment methods available to the shopper.

The payment service contacts the appropriate financial institution for authorisation. The result is presented to the shopper in a new window. The payment result can also be sent directly to the shopper from our system by email. For details please refer to Creating the order.

The payment result is also displayed in the Merchant Admin Interface and can be sent directly to your system as part of a financial report, or as an XML order notification. These methods may, however, require some integration with the Worldpay Payment service. For details of notifications please refer to the Order notifications section of the XML Integration Guide and the Merchant Admin Interface Guide.

3.4 Customise your own message

This is useful if you, the merchant, would like to control and freely customise the email sent to the customer to complete a *Pay By Link* process. For example: *Thank you for choosing this product, click* **Pay Now** *to pay, and we'll ship it to you within three days*.

To do this, integrate as you would for a hosted payment page, see the Hosted Payment Pages guide for details.

You use a hosted page integration, but you do not display the page to the customer. Instead, extract the URL from the response and insert this into your own e-mail template to send to the shopper.

3.4.1 Useful links

For information on:

Designing your own payment page, see the Payment Page Designer guide

Notifications, see the Order notifications part of the Worldpay Payment Gateway (WPG) guide

Receipts, see the Merchant channel section of the Merchant Admin Interface guide

4 Fast Access payouts with Visa Direct Fast Funds

Our hosted Call Center supports Visa Direct Fast Funds (VDFF) payouts with Worldpay's Hosted Payment Pages only.

> **Prerequisite:** You use our Hosted Payment Pages; you have contacted your Relationship Manager to be enabled for VDFF.

Once VDFF is enabled by Worldpay, the options to make VDFF payouts will appear in the Call Center page of the MAI:

> **Note:** VDFF only supports Visa cards.

4.1 Fast Access

To make a fast access payment complete these steps:

In the Call Center choose *New Fast Access Payout* and enter the required information:

- An Order code you specify
- A description for the payment
- Payout currency
- Payout amount

The shopper enters their required payment details and clicks Pay.

The shopper receives the payment within 30 minutes If their card issuer is fast funds enabled, or in 2-5 working days if not. You can check the payment status in the MAI.

4.2 Pay by Link

To send a Pay by Link payout request complete these steps:

1.   In the Call Center choose *Email new Fast Access order* and enter the required information:

   An Order code you specify

   A description for the payment

   Payout currency

   Payout amount

   Customer name (optional)

   Customer email address

2.   Click, Send email.

3.   You receive confirmation the email was sent.

4.   The shopper receives the email and clicks the link to the Hosted Payment Page.

5.   The shopper enters their card details and clicks **Pay**.

The shopper receives the payment within 30 minutes If their card issuer is fast funds enabled, or in two to five working days if not. You can check the payment status in the MAI.

Note: You can customise your own email message. See *Customise your own message* on page 9.

5 About this guide

5.1 Changes

Version history.

Version	Change Description	Date
4.5	Updated: Amended "Orders are valid for 5 days" to "three days"	September 2023
4.4	Updated: Hyperlinks In *Sending an email with payment instructions* on page 7, rearranged the material Added: In *Sending an email with payment instructions* on page 7, added a section on how to customise your own message In *How does the Hosted Call Center application work?* on page 4 added a note on card number masking Deleted: In *Sending an email with payment instructions* on page 7, deleted the *Customising V1 Pages* section - this is no longer used In *How does the Hosted Call Center application work?* on page 4 deleted the section on Importing order details	July 2020
4.3	Added: New topic: Fast Access pay-outs with Visa Direct Fast Funds. Updated: All references to Call Centre have been changed to Call Center in line with the actual MAI.	February 2020

5.2 Legal

© FIS 2023, and/or its subsidiaries. All rights reserved.

Worldpay (UK) Limited (Company No. 07316500 / FCA No. 530923), Worldpay Limited (Company No. 03424752 / FCA No. 504504), Worldpay AP Limited (Company No: 05593466 / FCA No: 502597). Registered Office: The Walbrook Building, 25 Walbrook, London EC4N 8AF and authorised by the Financial Conduct Authority under the Payment Service Regulations 2017 for the provision of payment services. Worldpay (UK) Limited is authorised and regulated by the Financial Conduct Authority for consumer credit activities. VAT number: 991 2802 07

Worldpay B.V. has its registered office in Amsterdam, the Netherlands (Handelsregister KvK no. 60494344). WPBV holds a licence from and is included in the register kept by De Nederlandsche Bank, which registration can be consulted through www.dnb.nl.

5.3 Feedback

We'd really appreciate your feedback on this guide. If you have any comments or suggestions, please let us know.

You can email us at: guides@worldpay.com

To find out more, get in touch with your corporate support manager or:

See our contact details at:
https://www.fisglobal.com/en/merchant-solutions-worldpay/get-in-contact

worldpay
from FIS