Setup Stripe & Safe Activation

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This paper outlines the easiest way to setup a fully automated purchase and Serial Number delivery process using Stripe and Safe Activation Service 3. It includes both a perpetual Product and monthly Subscription. The online help system within Safe Activation provides details for alternative integration approaches and additional options.

The setup process consists of creating a Product in Stripe, creating a matching Product order process in Safe Activation and linking Stripe to Safe Activation with a webhook.

For a simple product purchase, the user makes a one-time payment and receives a Serial Number by email that is used to activate the product. For a subscription purchase, the user makes the initial payment and receives a Serial Number by email. Periodic payments are automatically made until that subscription is cancelled.

This paper first covers the entire setup process of a Product purchase, then adds additional steps required for a Subscription purchase.

Stripe Test Mode

A Stripe account can be toggled between Live and Test mode using a switch at the top right of the Admin account. Products, Payment Links, API Keys and Webhooks in Test mode are completely independent of those same items in Live mode.

A Stripe account in Test mode can be linked to Safe Activation and works exactly the same as Live mode. When making a purchase in Test mode, use the following fake credit card number to complete a successful purchase. The name, expiration, security code and zip is not important.

4242 4242 4242 4242

Product Purchase

A Product button is configured in your Stripe account and then linked to a corresponding order process in Safe Activation. A payment link URL connects a button on your website to that product in your Stripe account.

This paper shows the Stripe and Safe Activation setups screens.
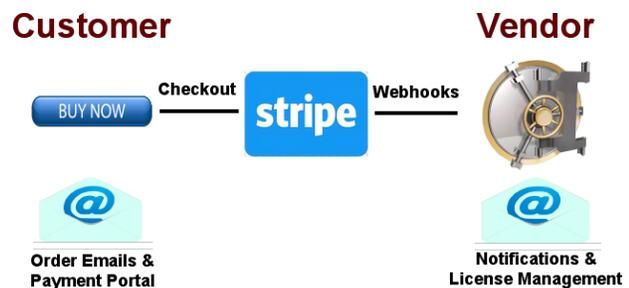
Create Product in Stripe

On the Product page in the Stripe account, click the **Add Product** button at the top right. Name the Product and add an image. Enter a price and click the One time button for the purchase.

Before customers can make actual credit card purchases, some information is required in your Stripe account. You may be required to link your Stripe account to a bank account.
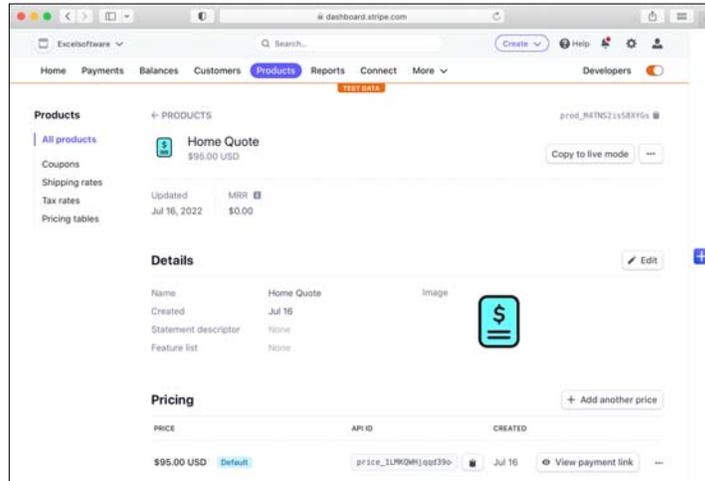
Setup Order Process in Safe Activation

Log into Safe Activation Service 3 and click Add in the Order Setup section of the menu. Name the order process and use default settings unless otherwise instructed. Set "Assign Quantity One Serial Number", "Enable Order Processing with Password" and "Require Unique Reference" checkboxes. Type %%OrderID in the Transaction Reference field.

Make sure the Stripe radio button is selected in the Payment Processor section.

The searchable online help system provides extensive help topics.
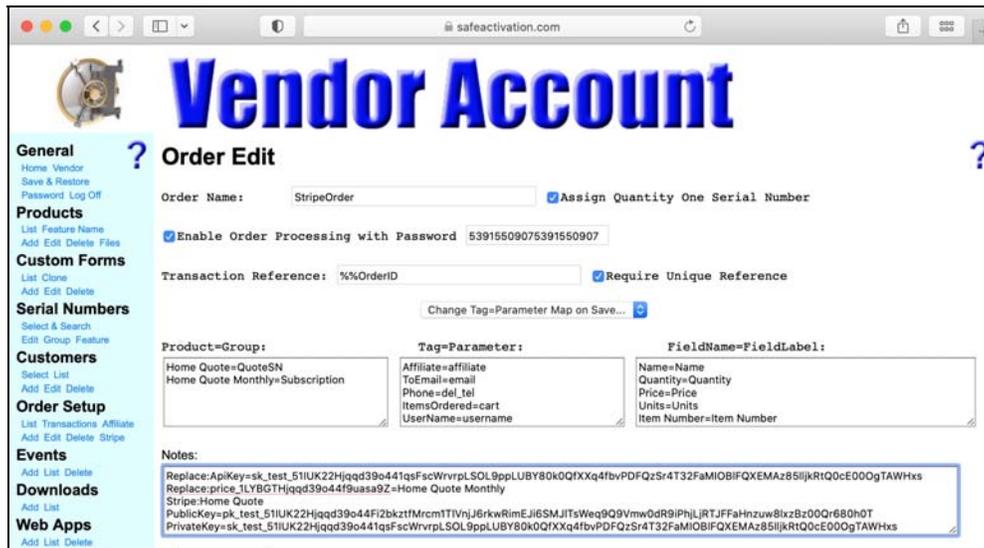
Notice the Product=Group section.

The Stripe product name appears on the left side of the equal character and the group name of Serial Numbers to pull from appears on the right side of the equal sign. No extra spaces or other characters are allowed. Each Stripe buy or subscription button pulls from a different group of Serial Numbers so if you create 5 purchase buttons, this section will have 5 lines.

After entering any data into a screen on Safe Activation, click the **Save Data** button at the bottom of the page. Later in the process, you will return to this screen to add text into the Notes field.

Within your Safe Activation account, select the Stripe page under the Order Setup section of the menu at the left side of browser window. On the Manage Stripe Button page, New Button is already selected in the Popup menu so click **Edit Button**.

The name of your product in Stripe must exactly match the Button Name defined on this page for your webhooks to work.

For this setup process, the buy button is setup within the Stripe account so most fields can be left empty on this page. After creating a Public and Private Key within your Stripe account, return to this page and paste those keys into the edit fields.

For now, enter "Product" in the License Type field and click **Save Button**.

Create Payment Link

After creating a Product or Subscription in Stripe, you will see it listed on the Product page. Click the Product name and then click **View Payment Link** button on the Product page. Copy the displayed URL of your payment link.

Link that URL to a button or image on your website. When a customer clicks the button or image, the Stripe checkout page is presented. Your website is now capable of processing credit card orders.

To complete the purchase process, take the customer to a download page. Automatically send them an email with an assigned Serial Number using the setup process below.

Assign Download Page

Click the **...** button to the right of your payment link to choose **Edit**. Select the Confirmation page tab, then set the Don't show confirmation page radio button. Enter the URL of a download page on your website.

The download page should thank the user for their purchase, inform them that a Serial Number is coming by email and explain how to Enable Macros in Excel or whatever info they need to get started. A link to your downloadable installer should reside on this page.

Most developers deliver software to the customer computer with an installer. The installer is a downloadable file that can be code signed for security or notarized with Apple when distributing software on macOS. An installer can be created with ClickInstall on macOS or Windows.

On Windows, the installer typically presents a license agreement for confirmation and then uses Microsoft's MSI technology to install files where they need to be and add shortcut icons to launch applications or documents. The user can later uninstall from the control panel.

The download page may optionally include a button to retrieve the purchased Serial Number or access the payment portal to update the customer credit card data for ongoing subscription payments.

Prepare To Sell

After defining a product in Stripe, you may be required to link your account to a bank account or provide other business information before you can accept live payments. Click the **Settings** button at the top right. Complete the screen under the Business Settings section.

The minimum processing fee for Stripe is fifty cents. If you make a live purchase for less, you may not see anything listed on the Payments page of your Stripe account. Before you start selling, integrate your Stripe account with Safe Activation so a Serial Number can be delivered to the customer during the purchase process.

Stripe API Keys and Webhooks

An API key and webhook link your Stripe account to Safe Activation. The same API key and webhook can be used to setup many products or subscriptions.

To create an API key, select the **Developers** button at the top right of your Stripe account. Select the API keys panel and click the button to reveal your private key. Enter this key value on the Button Edit page within your Safe Activation account. To access that page, present the Order Edit page. Now click select the Stripe page in the Order Setup section, select your button name and click **Edit Button**. Enter your public and private API keys and click **Save Button**.

On the Order Edit page, locate the Notes section and add a line at the top that consists of the word Replace, a colon, the word ApiKey, an = character and your private key. This field is required to process some types of webhook data.

Replace:ApiKey=sk_test_51IUK22Hjqqd39o441qsFscWrvrpLSOL9ppLUBY80k0QfXXq4fbvPDFQz Sr4T32FaMIOBlFQXEMAz85lljkRtQ0cE00OgTAWHxs

To create a webhook, select the Webhook panel in your Stripe account and click the **Add endpoint** button. Enter the URL of your Safe Activation order process. The URL may look something like this.

> https://www.safeactivation.com/autoorder.php?db=3&vendor=20010101&order=1&data=12345678901234567890

Several parameters must be customized to your specific Safe Activation account and order process. Locate the required db parameter on the Home screen and vendor parameter on the Vendor Info screen in Safe Activation. The order parameter is listed on the Order List page and is likely to be 1. The data parameter is the password found at the top of the Order Edit page.
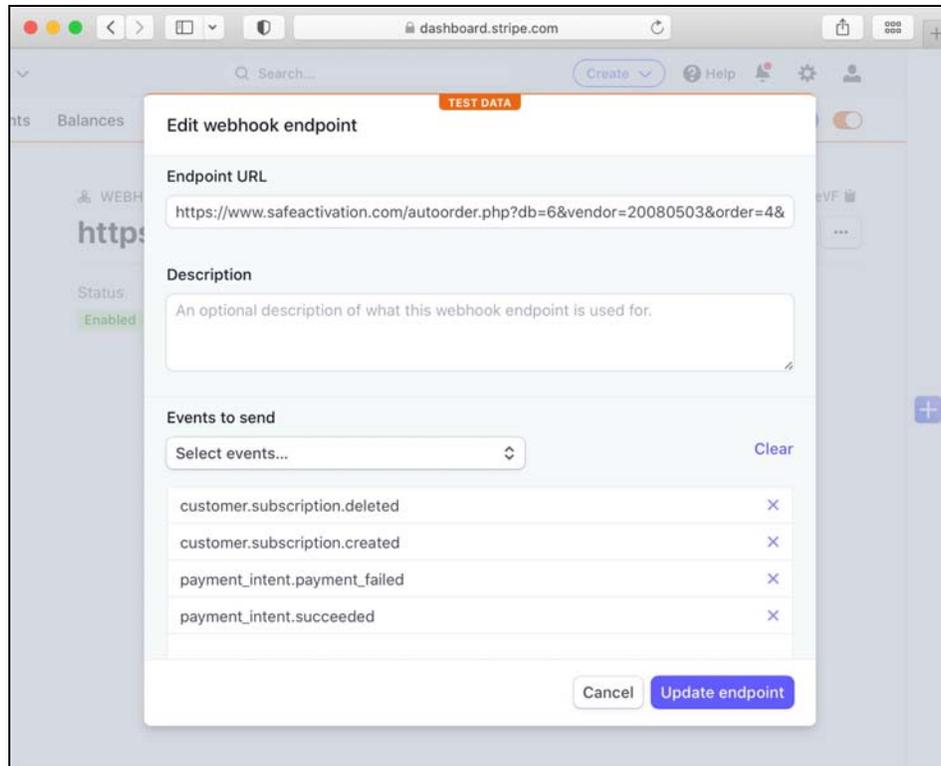
With your Stripe account, click the **select events** button to add one or more events to the webhook. Now click the **Add endpoint** button to save it. Here are the possible events that can trigger your webhook.

- payment_intent.succeeded
- payment_intent.payment_failed
- customer.subscription.created
- customer.subscription.deleted

All Product and Subscription licenses require the payment_intent.succeeded event. If you want to be notified by email from Safe Activation if a payment fails, include the payment_intent.payment_failed event.

For a subscription, also assign the customer.subscription.created and customer.subscription.deleted events.

Custom Email

When an order occurs, data is sent from Stripe to Safe Activation in a webhook. That process triggers Safe Activation to create a Transaction, assign a Serial Number and deliver an email to the customer. On the Order Edit page, customize the customer order email.

It is best to start with a plain text email to simplify the setup process and avoid having your email end up in the customer spam folder. Make sure Email to User is checked and customize the Subject and Template fields as desired.

The template contains a few tags that you don't want to modify including %%OrderID which identifies the Stripe order, the %%NonEmptyCustomerID which is only needed for a subscription if you plan to offer a Payment Portal page to the customer. The %%EachItemNameQuantitySN tag assigns a unique Serial Number from a specific Serial Number group based on the ordered product. Refer to the Product=Group section of the Order Edit page.

Test Product Purchase

Let's review the setup process for your Product purchase. Within Stripe, you have defined the product, generated a payment link URL and referenced that URL from a button or picture on your website. You have linked your Stripe account to Safe Activation with API keys and a webhook. You defined a corresponding Product entry on the Order Edit page to successfully capture the order data received in the webhook, create a Transaction and assign a Serial Number that is delivered to the customer in an email message.

From your website, click the purchase button and place an order.

After completing the transaction, you should be taken to the download page for further instructions. If everything was setup properly, your customer email address received an Order Summary email with an assigned Serial Number.

If you don't receive the Order Summary email, check your spam folder. Also check any emails received from Stripe that may indicate an issue with payment processing in your account.

In the Order Setup menu section within Safe Activation, click the Transaction page. If the order was properly processed, you should see a transaction listed. You can click the ID column of that Transaction list for more details.

If no transaction was created, review the steps in the setup process. From the Vendor Info page, locate the Log section. You can enable checkboxes to log various events during the order process to ensure that Stripe is sending the webhook data to your Safe Activation account. Now run another test and click on today's log entry to diagnose what may have went wrong.

Subscription Purchase

Defining a Subscription in Stripe is similar to a Product purchase. The payment will be reoccurring and is assigned to a Price ID that you need to copy into Safe Activation as described below.
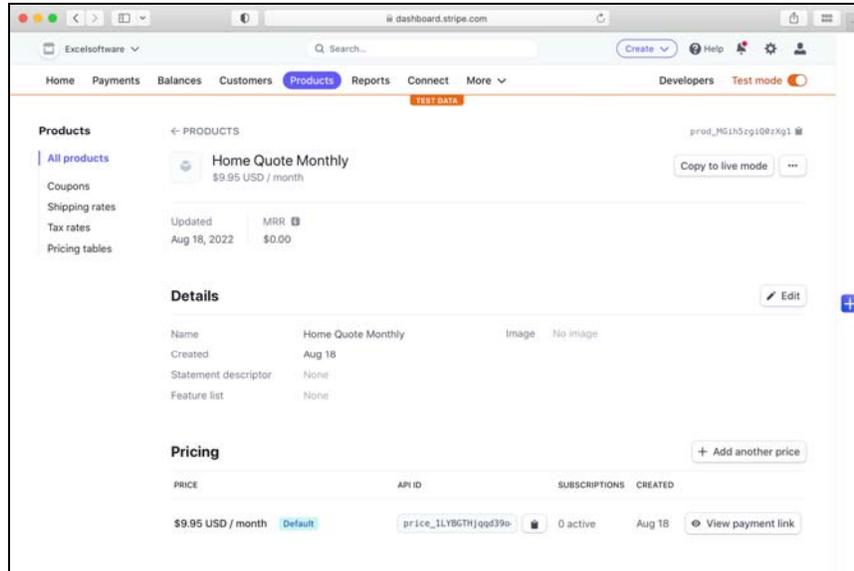
Within Safe Activation, setup the Order Process and Button page using the same process described for a simply Product. Copy in the Price ID field from your Stripe account. Type Subscription into the License Type field. Make sure the Button Name, Public Key and Private Key fields are correct. Many of the other fields can be left empty. Click the **Save Button** to save editing changes on this screen.
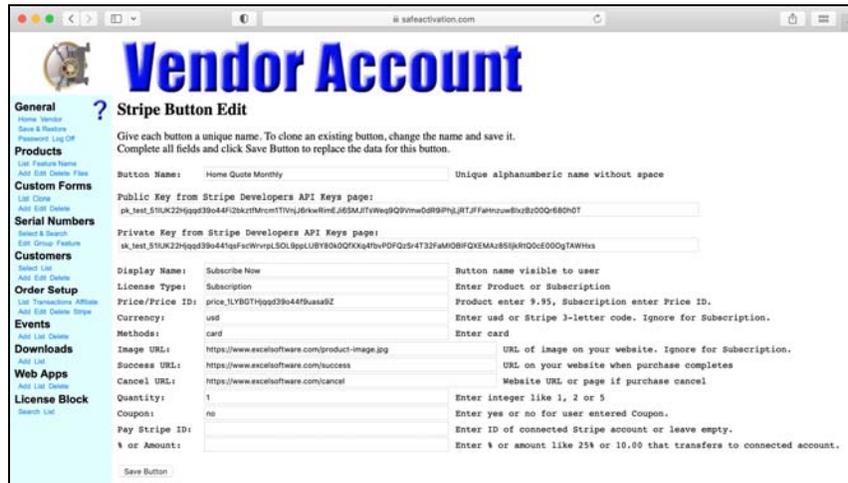
At the top of the Notes field on the Order Edit page, you will need an entry that associates a Price ID with a specific button name. Here is an example. Subscription orders are ignored by Safe Activation is this data isn't defined.

Replace:price_1LYBGTHjqqd39o44f9uasa9Z=Home Quote Monthly

On the Order Edit page, make sure the Subscription Cancel checkbox is set so the Subscriber checkbox associated with a purchased Serial Number can be cleared if the user stops paying for a subscription. That triggers the license to be disabled for the next subscription period.

Test Subscription Purchase

For a simple Product purchase, the payment_intent.succeeded webhook data triggers a Transaction to be created that assigns and emails the Serial Number to the customer.

For a subscription purchase, the payment_intent.succeeded and customer.subscription.created webhooks can be received in any order and collectively provide the need data to generate the Transaction. Furthermore, additional payment_intent.succeeded webhook data is sent each time a periodic subscription payment is completed.

Purchase the configured subscription by clicking the button on your website and completing the order process. A Transaction should be created in Safe Activation that assigns a Serial Number and delivers it to the customer in an email message.

Stripe Payment Portal

When configuring a Stripe subscription in Safe Activation, a URL is automatically provided that allows a customer to access the Stripe Customer Portal page to manage that subscription. The customer can change payment information, cancel their subscription or perform other actions enabled from within the Stripe account.

Stripe Customer Portal

Enter Customer ID [   ] [Portal]

To get that URL, go to the Order Edit page, click Stripe, choose the Subscription button and click **Try Button**. That URL can be referenced from your website. Detailed information is included on this page.

If a customer cancels their Subscription from the Stripe Customer Portal, they are really registering a request to have it cancelled at the end of the subscription period. This feature is configurable within your Stripe account. The subscriber checkbox associated with their Serial Number is not cleared until the end of their subscription period.

To immediately cancel a Subscription, the vendor can locate the Subscription under Customers in their Stripe account and cancel it there. If properly configured, the Subscriber checkbox is immediately cleared in Safe Activation for the associated Serial Number.

The Customer ID can be included with the Serial Number in an email sent to the customer during the purchase process.

If you sell multiple subscriptions, the same Customer Portal page will work with all your subscriptions.

Before the Customer Portal feature will work in Stripe, you must first confirm several options within your Stripe account. On the Settings page, click Customer Portal under the Billing section. Make changes to the Customer Portal setup page including the required Terms Of Service and Privacy Policy page, then click the **Save** button.