UMarket-Checkout : User's Guide

Income Accounting and Student Loans

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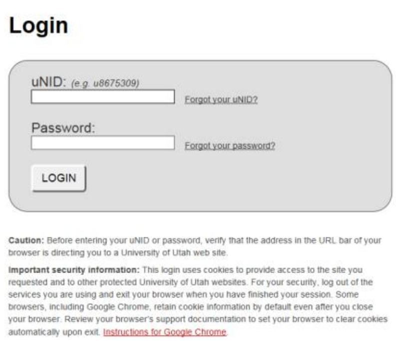
UMarket Checkout is a University of Utah application for accepting credit card payments. It includes a checkout page, a confirmation page, a secure payment page, and a thank you page. The department may set up their own products or send information from a web-form or application to UMarket Checkout to collect customer information and payment. The following guide will help you to set up your UMarket Checkout pages and products. UMarket Checkout keeps a record of all completed transactions.

Log In to the Admin Module

- Log into the UMarket Checkout Admin Module using the link below. Save to your Favorites/Bookmark. You will be prompted to enter your UNID and password (CIS).

https://pay-admin.app.utah.edu/



- Choose the account you want to look at by clicking on the **Account -- Name** in red. You will only see those accounts you have been given access to.

Manage Accounts

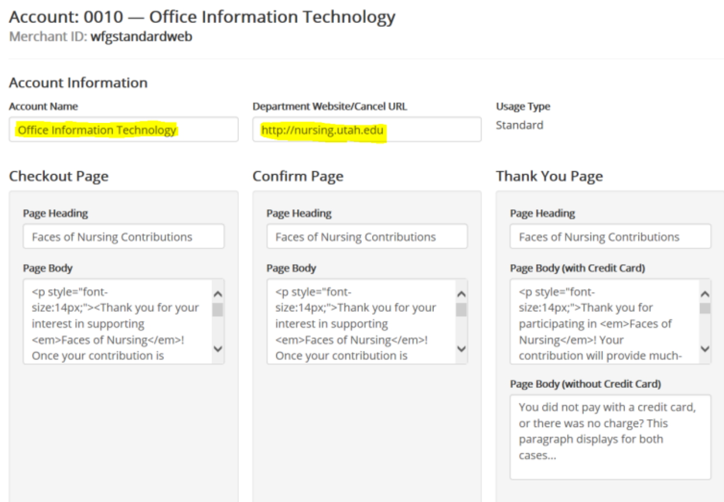
In Use	Account—Name	ORGID—Department	Usage Type
✓	0005—OFFICE OF THE DEAN - BUSINESS	00036—SCHOOL OF BUSINESS CENTERS	Standard
✓	0006—UTAH MUSEUM OF NATURAL HISTORY	00018—NATURAL HISTORY MUSEUM OF UTAH	Standard
✓	0009—OFFICE RESIDENTIAL LIVING	00307—HOUSING & RESIDENTIAL EDUC.	Standard
✓	0010—OFFICE INFORMATION TECHNOLOGY	00353—INCOME ACCOUNTING	Standard

- The **Usage Type** is managed by Income Accounting. Please discuss with them which Usage Type you would like to use.
  - **Standard** – used for a stand-alone checkout page, confirmation page, and thank you page.
  - **Pre-fill** – used when your web form or application sends billing/customer information to the checkout page. The user will also see a confirmation page and a thank you page.

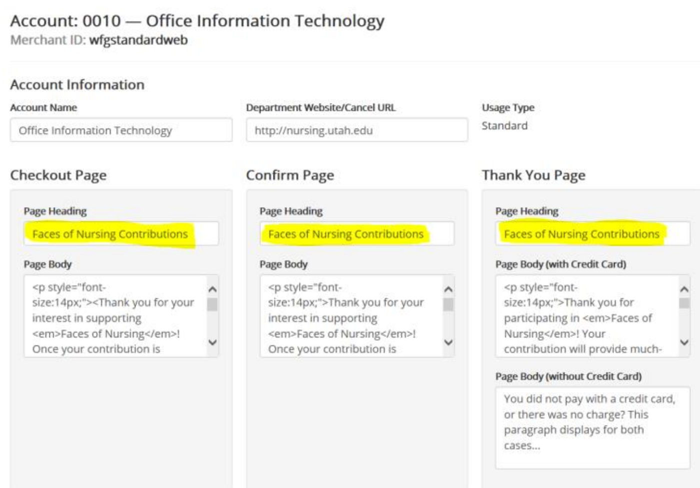
- **Pass-Through** – used when your web form or application sends billing/customer information to the checkout page, but the user only sees the confirmation page, and a thank you page OR you can bypass the thank you page if your application will produce a thank you page for you. A post-back will be sent to your web-form or application as an indicator that the transaction was completed.
- **Auto-Submit** – used when your application sends billing/customer information to the checkout page, but user only sees the secure payment page hosted by Wells Fargo Gateway. Your application sends the customer email and the thank you page. (Auto-Submit Usage must be approved by Income Accounting.)

Manage Your Account Pages

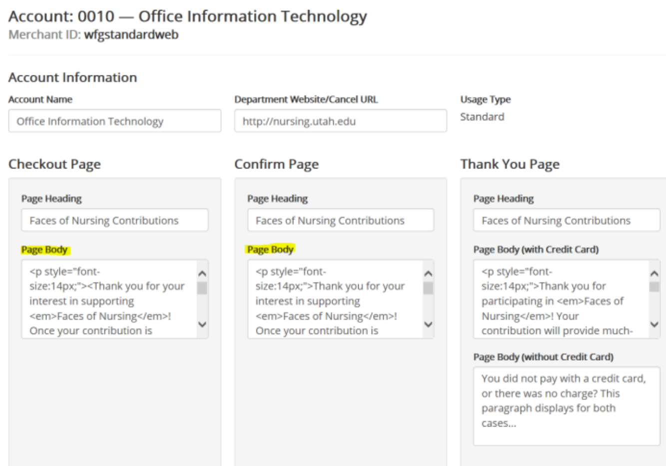
- To create the content of the checkout page, first enter your **Department Name** and your **website URL**. This is where the user will be sent if they cancel out of their transaction.



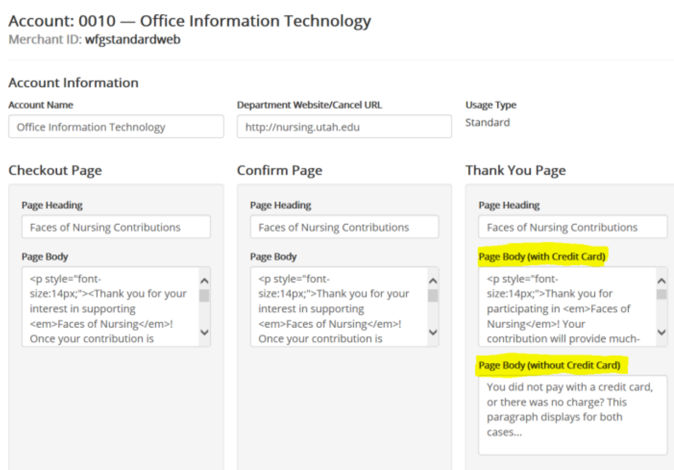
- Next, create your **Page Headings**. It is helpful to the user to see the same heading for each page so they feel confident they are still on the right track to completing their transaction. The user will see the **Checkout Page**, the **Confirmation Page**, and the **Thank You Page**.



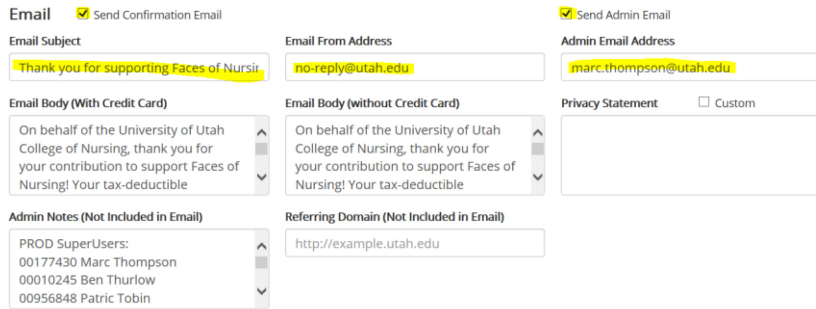
- Next, enter text into the **Page Body** of each page. You may use HTML, but it is not necessary.



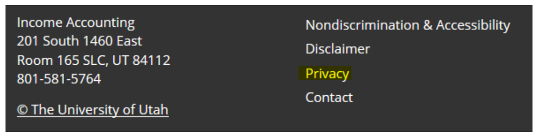
- The **Thank You Page** has two spaces for text. The **Page Body (with Credit Card)** will appear when the user pays with a credit card. The **Page Body (without Credit Card)** can be used if you allow users to send you a check or the item is $0.00. The text should be different based on whether or not the user has paid. If the user is going to send you a check, give them instructions where to send the check, and who to make it out to.



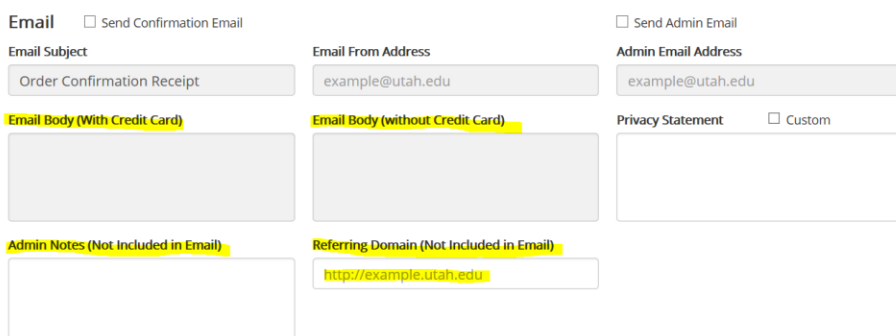
- Now, create your **Email Settings**. You can have a **Confirmation Email** sent to the user, or uncheck the box if your own application will send a confirmation email.
- Create the **Email Subject** – include your department name or something that is consistent with your other headers so that the user will recognize it.
- The **Email From Address** should be an email address that the user can reply to. You can have someone in the department designated to receive those emails, or have a generic email address created to receive the emails.
- The **Admin Email Address** should be the email address of your employee(s) that wants to receive an email each time a transaction is completed. This is optional. More than one person can receive the email, just separate the email addresses with a coma (,).



- The **Privacy Statement** defaults to a standard University Privacy Statement. You may customize your own if you wish. This will only appear if the user clicks on Privacy at the bottom of any of the UMarket pages.



- Enter text for the body of the email. Things that are appropriate to include are:
  - "U of U Web Pmt will be the description on your statement for this transaction."
  - "Thank you for your payment."
  - Contact Information
  - Instructions that apply to the product
  - Other websites you may want the user to visit.
- The text for those that pay with a credit card should be different than those that will send a check or have a $0. This is a good place to **repeat** the instructions you entered on the Thank You page.
- There is a place for **notes** that will not be a part of the emails. You may use this however you wish.
- The **Referring Domain** is the URL of the webpage where the user clicked on the link to get to the checkout page. This information helps the Payment Processing team troubleshoot any problems that could occur.

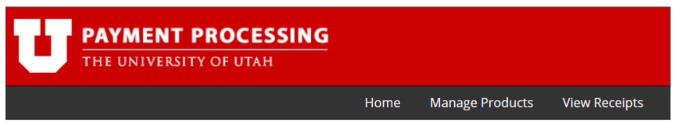


- You may put an image on the **Confirmation** and **Thank You Pages**. You have the option to use a standard U of U logo, upload your own custom logo or picture, or have no image at all. If you want to upload your own custom image you must select **"○ USE"** and the **UPLOAD NEW IMAGE** button will appear. If the image is too large, use Microsoft Office or Paint to reduce the size and resave your image. Try to upload it again.

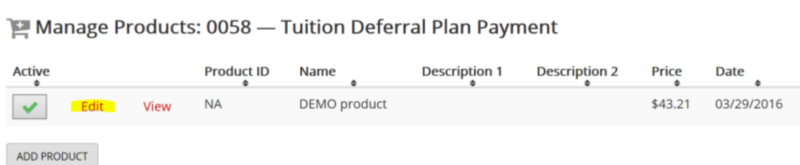
- When you have everything entered, or anytime during the process, click on **UPDATE** at the bottom of the page to save your work. You can always go back in and edit later.

Creating Products

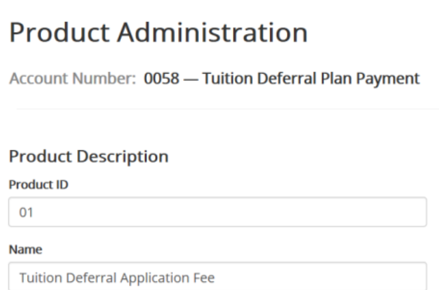
- At the top of the page click on Manage Products, in the black ribbon.



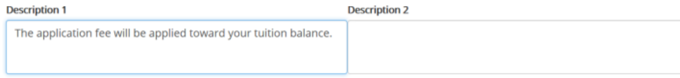
- You will see a default of **DEMO Product**. The **Product ID** will be **NA**.
  - If you are going to have your own web form send information to the checkout page, you can simply edit the product name and amount. However, the amount can be overwritten by the parameters sent by your web form.
  - If you are NOT going to use your own web form, you can de-activate this product by clicking on the check mark. Then click on Add Product.



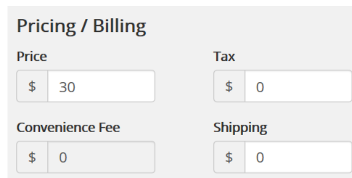
- Each product must have a unique ID. The **Product ID** can be a number, a short product name, or an acronym. Remember, this will be part of the URL for your checkout page, so keep it short and simple.



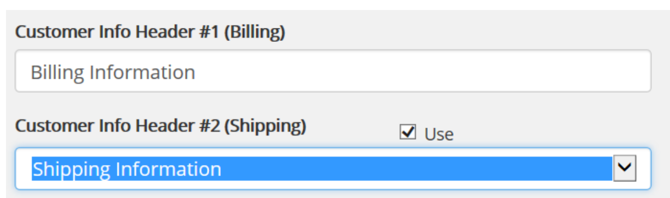
- You may add a **Description** in either one or both of the description boxes.



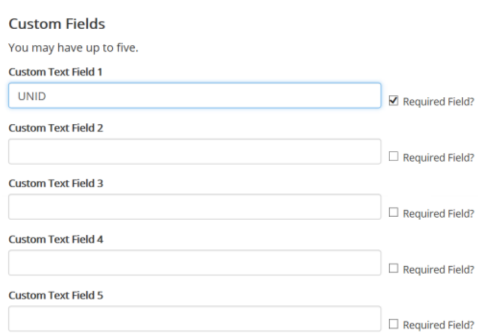
- Set your **Pricing**. A decimal point (.) is not necessary unless you have dollars AND cents in your price. If you wish to charge a convenience fee, contact Income Accounting to activate this feature. You may check with Tax Services (581-3428) to see if you must collect tax for your products. **Tax** usually only applies to merchandise. This is also where you may enter any applicable, flat shipping amount. The **shipping** will be applied to each transaction for this product.



- The **Customer Info Header #1** will default to **Billing Information**. However, you may type in a new header, such as "Registrant Information". If you choose to collect both Billing Information and Registrant or Student Information, leave Header #1 as Billing and check the □ USE box for **Customer Info Header #2** and choose the Header for that section from the drop down. **Customer Info Header #2** may also be used for a shipping address. If the billing and shipping address is the same, the user will be able to check a box that will prefill the shipping address so they only type it once.

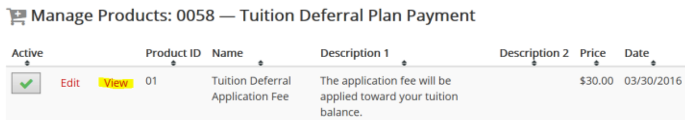


- Finally, you have an opportunity to ask 5 more questions of the user with **Custom Fields**. These fields are often used for information such as "Student Name", "UNID", "Title", "University Affiliation", etc. The user will enter their answer in a text box. You may require the answers to your questions by checking the box. The user cannot continue until the question is answered. The custom fields will appear as part of the **Billing Information Header #1** section of the Checkout Page.

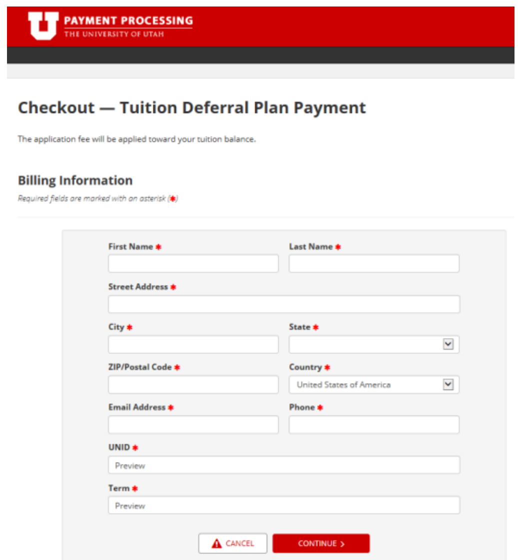


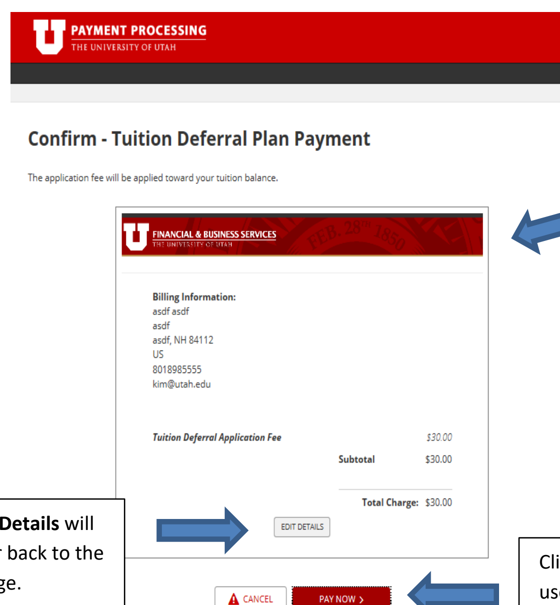
- Save your work by clicking on **ADD**. You can go back in and edit at any time.

- To see the Checkout Page, click on **View**.



  - Remember, the custom logo will not be on the Checkout Page, only the Confirmation Page and the Thank You Page.



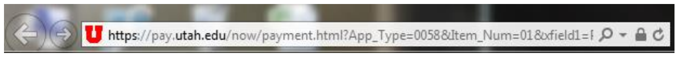


Note the custom logo here.

Clicking **Edit Details** will take the user back to the Checkout Page.

Clicking **PayNow>** will take the user to the secure payment page.

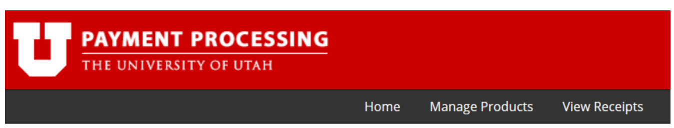
- When you view the checkout page, copy the URL in your browser bar. This is the URL you will use on your website to direct users to the checkout page. It may be a hyperlink or a button. Your web master will be able to add this for you.



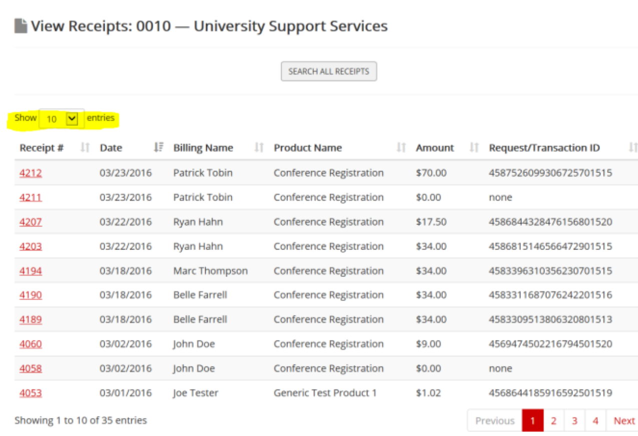
  - If this is a $0 item, add **&cc=f** to the end of the URL.
  - If you are going to allow users to send you a check, you will need 2 links. Use the URL once for credit cards as it appears in the browser, and have a second link with **&cc=f** at the end of the URL for the check payments.
  - **&cc=f** also triggers the system to avoid the payment page and give the correct thank you page and email text.
- If you are using your own web form or application and wish to send parameters to the checkout page, please see Appendix A.

View Receipts

- Once you have transactions and have received administrative emails, you may view the receipts in the Admin Module. Click on **View Receipts** from the black ribbon.



- The most recent receipts appear first, by default. You may sort the list by any of the columns by clicking on the grey arrows. You may choose how many lines to view at a time. Each receipt will be assigned a number. Click on the **<u>Receipt #</u>** to view the details of the receipt.



View Receipts: 0010 — University Support Services

SEARCH ALL RECEIPTS

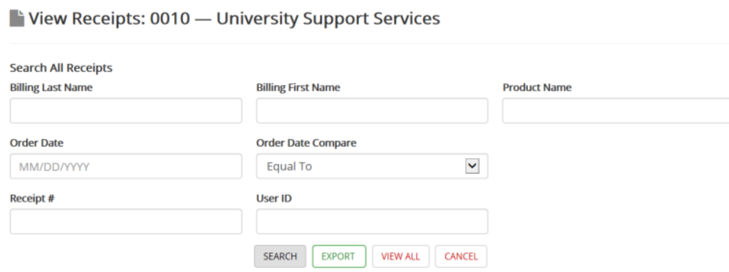
Show 10 entries

Receipt #	Date	Billing Name	Product Name	Amount	Request/Transaction ID
4212	03/23/2016	Patrick Tobin	Conference Registration	$70.00	4587526099306725701515
4211	03/23/2016	Patrick Tobin	Conference Registration	$0.00	none
4207	03/22/2016	Ryan Hahn	Conference Registration	$17.50	4586844328476156801520
4203	03/22/2016	Ryan Hahn	Conference Registration	$34.00	4586815146566472901515
4194	03/18/2016	Marc Thompson	Conference Registration	$34.00	4583396310356230701515
4190	03/18/2016	Belle Farrell	Conference Registration	$34.00	4583311687076242201516
4189	03/18/2016	Belle Farrell	Conference Registration	$34.00	4583309513806320801513
4060	03/02/2016	John Doe	Conference Registration	$9.00	4569474502216794501520
4058	03/02/2016	John Doe	Conference Registration	$0.00	none
4053	03/01/2016	Joe Tester	Generic Test Product 1	$1.02	4568644185916592501519

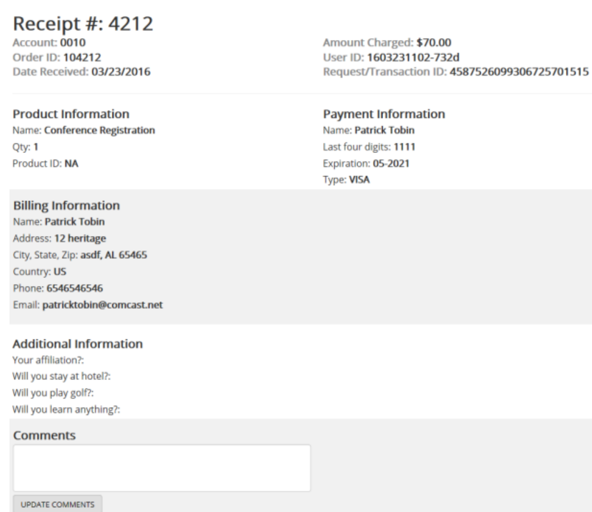
Showing 1 to 10 of 35 entries

Previous 1 2 3 4 Next

- To refine your search, you may click on the **Search All Receipts** button to search by name, product, date, etc. You may also export all the receipt data to and Excel spread sheet by clicking on the **EXPORT** button.



- You may leave comments on the receipt to help you manage the transactions. The comments will never be seen by the user, but may be seen by the UMarket team or other administrators in your department. Comments will also be included on the Excel spreadsheet when exported.



- If a receipt has **NONE** in the **Request/Transaction ID** space, it means the transaction did not go through and no money has been debited from the cardholder or deposited to your account.
    - If the product was for a $0 amount or the user is going to send a check, **NONE** is the correct response.
    - If the product was for a specific $ amount, you should verify whether or not the credit card transaction was completed by using the **WFG Credit Card Detail in CIS**.

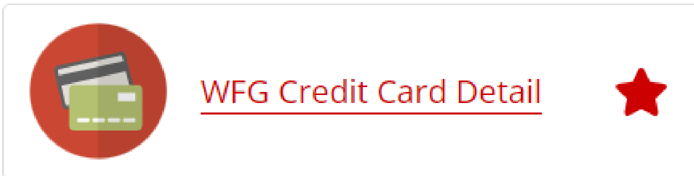
Receipt #	Date	Billing Name	Product Name	Amount	Request/Transaction ID
136	02/10/2016	test test	Product Payment	$0.00	none

-
    - Go to the **WFG Credit Card Detail in CIS** to look for the transaction. (see how to access below)
        - If the transaction does not appear in the WFG Credit Card Detail, the transaction was never completed.
        - If the transaction DOES appear in the WFG Credit Card Detail, copy the **Request ID** and paste it into the comments area. This is for future reference in case you need to do a refund.

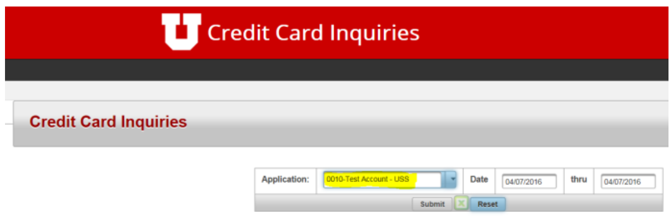
WFG Credit Card Detail

UMarket contains a receipt database of your orders. Once an order is attempted, the record is kept, and no other financial transaction will take place here. If UMarket is used for a $0 purpose, the records of those items will also be kept in the UMarket receipt database. To see a record of your FINANCIAL DATA you may access the **WFG Credit Card Detail**.

- Log into CIS as usual
- Find the WFG Credit Card Detail Icon located under Finance/Accounting

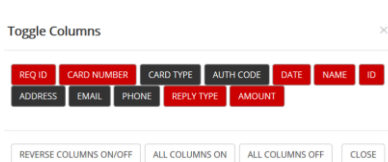


- The second header down is **Transaction Detail Search,** under that click **WFG Credit Card Detail.**
- Choose the account you want to look at. If you only have one, it will be there by default.



- The previous calendar day will be the default search. You may put in your own range of dates, or use the **Search** function to search by name, last 4 digits of the card, Order ID, Request ID, Amount, etc.

- Information from your search can be exported to **Excel** by clicking on the Excel icon.
- You may also choose what columns you want to view on the report by clicking on the **Columns Toggle** button. Click the column header you don't want to see and it will turn black and no longer appear on your screen. Go back in and click on **Reverse Columns On/Off** to restore all columns to the screen, or just click on the black column header.



- You may also sort by **Column**, for example: sort by **Date** or **Last Name**, by clicking on the column header.

Date	Name
04-04-2016 06:56:54	Test,Test
04-04-2016 06:56:54	Test,Test

- If someone has paid by check, the transactions will NOT appear in the WFG Credit Card Detail. Only credit card transactions are listed. All checks must be deposited according to your department deposit procedure.
- If you find a discrepancy between UMarket and the WFG Credit Card Detail, please contact Income Accounting for assistance.
- Please remember that if you have an order that says **NONE** instead of a Request/Transaction ID#, check the WFG Credit Card Detail double check if the transaction was completed and just didn't get reported to UMarket. Then make notes on the receipt **Comments** box in UMarket.

Refunds

UMarket transactions are refunded through the Income Accounting Office. All refunds must be given in the same manner that the payment was received. If a User paid through UMarket, they must be refunded through UMarket. If a cardholder paid you with a credit card, you must give the refund back to the same credit card. There are only a few exceptions:

- Exception 1 – the original transaction is more than 6 months old. In this case we are unable to refund through our system, so you may request a check through Accounts Payable.
- Exception 2 – the card used in the original transaction has been closed. In this case, you may send the refund check, but please ask the following questions first.
    - "Did you get a new card from the same card issuer?" If so, the card issuer will transfer the credit to the new card account.
    - "Have you spoken to your card issuer about how they handle refunds when the account/card has been closed?" Please encourage them to do so.

- Please be aware of how your customers communicate with you when requesting a refund. A common **fraud** tactic is to request a large refund be made to a **new** card number rather than the card used in the original transaction. These requests are generally made *only* via email. If you have a situation of this nature, contact Income Accounting for assistance before proceeding with any refund request.
- Click here to get a copy of the Refund Form and the Refund Procedure.
- Refunds generally take between 3 to 5 business days before the customer will see it. The time can vary by card issuer and the time of day the refund request was received.
- Please be aware that we cannot respond back to every refund request. Be sure to check the WFG Credit Card Detail within 3-5 business days to see that the refund was sent. You will see in the Reply Type Column **ics_credit** for refunds, **ics_bill** for your normal transactions.

Reply Type
ics_bill
ics_credit

Contact Information:

Income Accounting and Student Loans
201 S 1460 E RM 165
Salt Lake City, UT 84112
Fax 801-585-3898

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Sherrie Johnson
UMarket Refunds
801-581-5764
Sherrie.Johnson@income.utah.edu

APPENDIX A:

DepartmentContent

App_Type DEPT_NAME P_TEXT1 P_TEXT2 C_TEXT1 C_TEXT2 T_TEXT T_TEXT_CC T_TEXT_NO_CC EMAIL_SUBJECT E_TEXT2
EMAIL_CC EMAIL_NO_CC EMAIL EMAIL_SEND CONTACT_NAME FEE RQ_ADDRESS RQ_CITY RQ_STATE RQ_ZIP
RQ_COUNTRY RQ_EMAIL PRIVACY_STATEMENT CANCEL_URL Items FIELD3 FIELD4 FIELD5 FIELD6 FIELD7 FIELD8
FIELD9 Additional_Info

Items

SKU App_Type ITEM_NUM ITEM_PRICE ITEM_NAME ITEM_DATE TAX RQ_FIELD1 FIELD1_LABEL POSTAGE
SHIP_TO ITEM_DESCRIPTION1 ITEM_DESCRIPTION2 RQ_FIELD2 FIELD2_LABEL RQ_FIELD3 FIELD3_LABEL RQ_FIELD4 FIELD4_LABEL
CUSTOMER_INFO_LABEL SHIPPING_INFO_LABEL FIELD15 FIELD16

EmployeeLogin

App_Type Unid EMAIL EMAIL_SEND MOD_DATE RQ_ADDRESS RQ_CITY RQ_STATE RQ_ZIP RQ_COUNTRY RQ_EMAIL
CONTACT_NAME FEE SKU FIELD4 FIELD5 FIELD6 FIELD7

Receipts

SKU ORDER_ID CC ORDER_DATE App_Type ITEM_NAME ITEM_NUM ITEM_QTY ORDER_AMOUNT FIRST_NAME
LAST_NAME EMAIL PHONE ADDRESS CITY STATE ZIP COUNTRY STATUS COMMENTS IP CC_NAME
CC_NUMBER CC_TYPE CC_EXP ShipTo_FirstName ShipTo_LastName ShipTo_Address ShipTo_City ShipTo_State
ShipTo_ZipShipTo_Country ShipTo_Phone FIELD1 FIELD2 FIELD3 FIELD4 ID Time_Stamp

TempReceipts

SKU ORDER_ID CC ORDER_DATE App_Type ITEM_NAME ITEM_NUM ITEM_QTY ORDER_AMOUNT FIRST_NAME
LAST_NAME EMAIL PHONE ADDRESS CITY STATE ZIP COUNTRY STATUS COMMENTS IP CC_NAME
CC_NUMBER CC_TYPE CC_EXP ShipTo_FirstName ShipTo_LastName ShipTo_Address ShipTo_City ShipTo_State
ShipTo_ZipShipTo_Country ShipTo_Phone FIELD1 FIELD2 FIELD3 FIELD4 ID Time_Stamp RESPONSE

The end user will ultimately see 4 web pages when paying for an item with credit card.
1. checkout.tpl (web form where user enters billing and shipping data)
2. confirm.tpl (page displaying data user has entered, hidden form post to https://orderpage.ic3.com/hop/orderform.jsp)
3. https://orderpage.ic3.com/hop/orderform.jsp (cybersource credit card form)
4. thanks.tpl (web page displaying thank you message with details of what was purchased/paid for)

The admin interface for Payment Processing is here:
https://pay-admin.app.utah.edu/

Here's an example URL for Payment Processing:
https://pay.utah.edu/now/payment.html?App_Type=0010&Item_Num=1&xfield1=Preview
Here are the parameters our checkout page will accept from your server to initialize a transaction:
https://pay-admin.app.test.utah.edu/ (this is our test url):

App_Type=0019
Item_Num (the ID for items you are selling, 'NA' is reserved and special, if Item_Num is NOT
provided the Item_Num=NA is assumed and it's price can be overridden by the amt parameter)
ID (should be your system's unique identifier)
amt (will override the price on any item)
qty (multiplier)
cc (t by default, if value set to f, no credit card processing will occur)
~FIRST_NAME
~LAST_NAME
~EMAIL
~PHONE
~ADDRESS
~CITY
~STATE=UT (2 letter)
~ZIP
~COUNTRY=US (2 letter)

xfield1 (optional extra text field per item)
xfield2 (optional extra text field per item)
xfield3 (optional extra text field per item)
xfield4 (optional extra text field per item)
xfield5 (optional extra text field per item)
xfield6 (optional extra text field per item)

Example:

https://umarket.utah.edu/ecomtest/checkout.tpl?App_Type=0019&ID=Nguyen757232&amt=785&~FIRST_NAME=Johnny&~LAST_NAME=Nguyen&~EMAIL=nsaneazylm%40gmail.com&~PHONE=9364397025&~ADDRESS=4092%20S.%201135%20E.&~CITY=Salt%20Lake%20City&~STATE=TX&~ZIP=84124&~COUNTRY=US

Fields beginning with ~ are considered all or none. There are 9 of them and to be used, one must include all 9 whether they have values assigned to them or not.

For a fake/test credit card choose Visa, CC# 4111111111111111 with any verification number and expiration date in the future.

Typically what we do is to only post back to your server when a transaction is successful. Errors and/or declined transactions are handled for the most part by CyberSource, but in the event when CyberSource does return a transaction that is NOT approved, we simply display an error to the end user and allow them to try again.

So, what we need from our business user is a url that our server can post back to with the parameters your system needs to update that user's record as paid.
Using this model, most of our clients receive the following parameters in that post back of a successful transaction.

ID
ORDER_AMOUNT
ORDER_DATE
Status = paid

We can also redirect the user's browser back to your server following the post operation if that's what you would like, again with any parameters needed to identify that user on your system.

All Order Processing possible POST back variables>>>>>>>>>>>>>>>>>
Status=1 (Successfull transaction)
SKU=[SKU] (unique identifier, aprox. 15 chars)
ORDER_ID=[ORDER_ID] (last 2 of App_Type + SKU)
ID=[ID] (value from URL if provided)
CC=[CC] (if value EQ 'f', a credit card was NOT charged)
ORDER_DATE=[ORDER_DATE] (mm/dd/yyyy)
App_Type=[App_Type] (00xx)
ITEM_NAME=[ITEM_NAME]
ITEM_NUM=[ITEM_NUM]
ITEM_QTY=[ITEM_QTY]
ORDER_AMOUNT=[ORDER_AMOUNT] (total charged 0.00)
FIRST_NAME=[FIRST_NAME]
LAST_NAME=[LAST_NAME]
EMAIL=[EMAIL]
PHONE=[PHONE]
ADDRESS=[ADDRESS]
CITY=[CITY]
STATE=[STATE]
ZIP=[ZIP]
COUNTRY=[COUNTRY]
SHIPTO_FIRSTNAME=[SHIPTO_FIRSTNAME]
SHIPTO_LASTNAME=[SHIPTO_LASTNAME]
SHIPTO_PHONE=[SHIPTO_PHONE]
SHIPTO_ADDRESS=[SHIPTO_ADDRESS]
SHIPTO_CITY=[SHIPTO_CITY]
SHIPTO_STATE=[SHIPTO_STATE]
SHIPTO_ZIP=[SHIPTO_ZIP][/url][!]
SHIPTO_COUNTRY=[SHIPTO_COUNTRY]
FIELD1_LABEL=[FIELD1_LABEL]
FIELD1=[FIELD1] (additional field1 value)
FIELD2_LABEL=[FIELD2_LABEL]
FIELD2=[FIELD2] (additional field2 value)
FIELD3_LABEL=[FIELD3_LABEL]
FIELD3=[FIELD3] (additional field2 value)