Rutgers University

QuikPay® Commerce Manager Administrator Guide

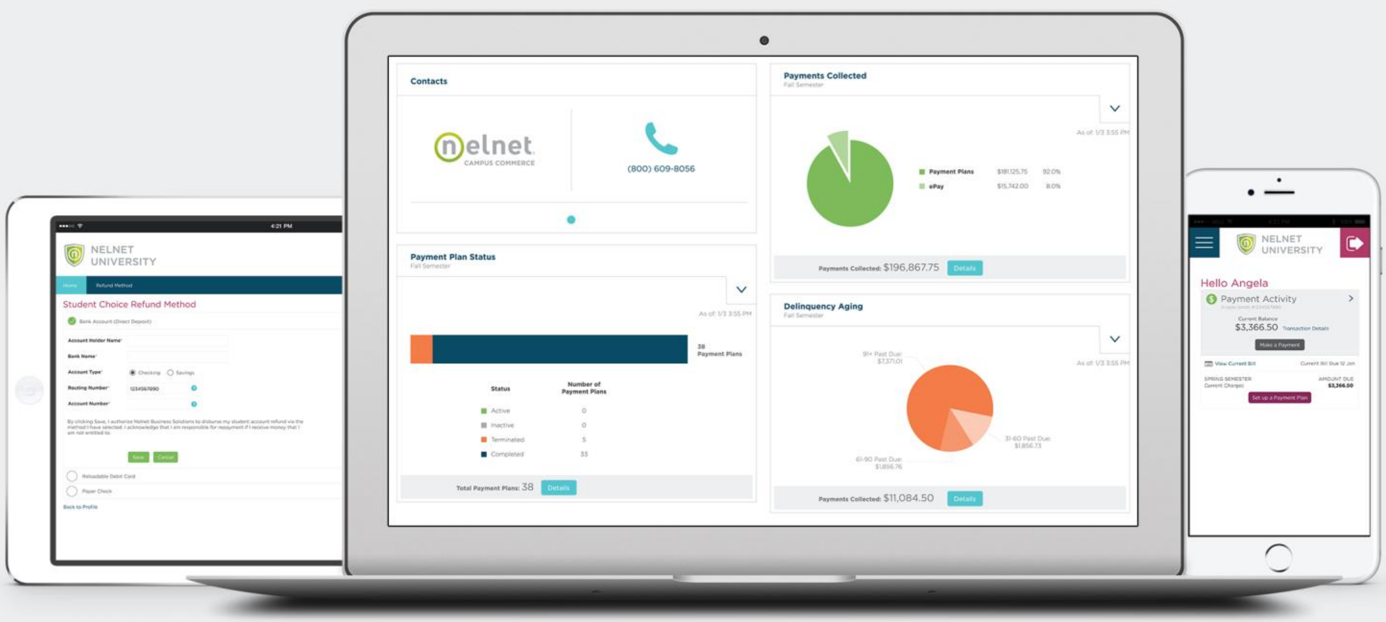


Table of Contents

The following document is a Commerce Manager Quick Guide for managing Commerce Manager orders. For a comprehensive overview of Commerce Manager functionality, refer to the QuikPay Commerce Manager User Guide – provided by Nelnet upon request.

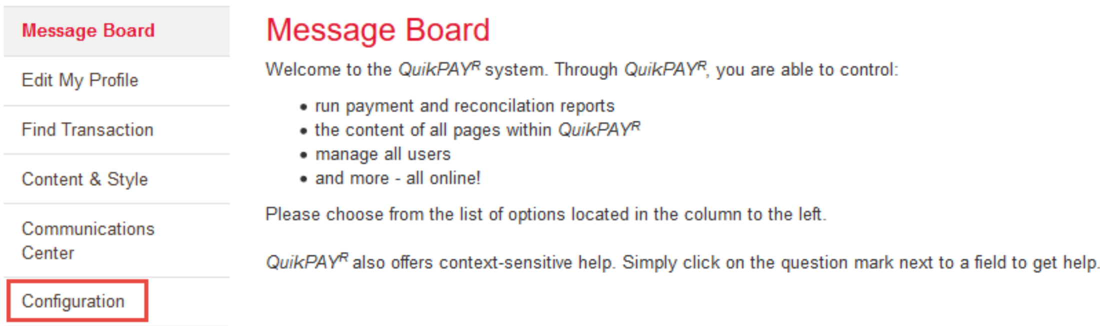
Help Options

Throughout the application there are question mark icons. These indicate that Help information is available for that section. Click on the icon and a new Help window opens. The Help text can be printed from this window. Click Close to return to the QuikPay page.

Tasks Performed by the Commerce Manager Administrator

Creating and Managing Orders

When logged in as an Administrator in QuikPay UAT, select Configuration from the left-hand menu bar. You can perform these actions as a Root and CM Administrator.



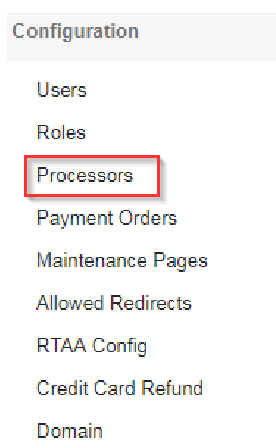
Processors

Prior to configuring a payment order, it is necessary to decide what processor should be linked to the order. If using an existing processor, you may skip to the Orders sections. If creating a new processor, follow steps outlined below.

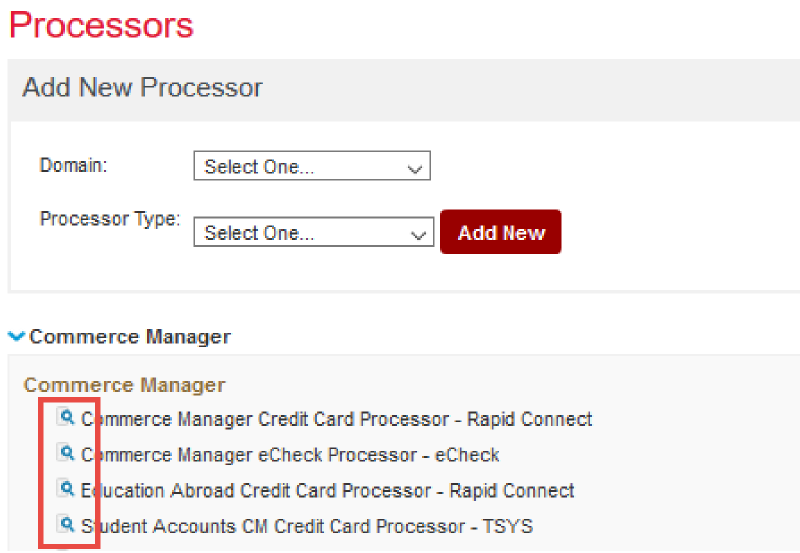
Important Note: Use caution when creating processors as they cannot be deleted and will require Nelnet intervention especially if any transactions are linked to a processor. We recommend to use the copy option and/or reach out to your Nelnet support team for assistance.

Creating a copy of a credit card processor

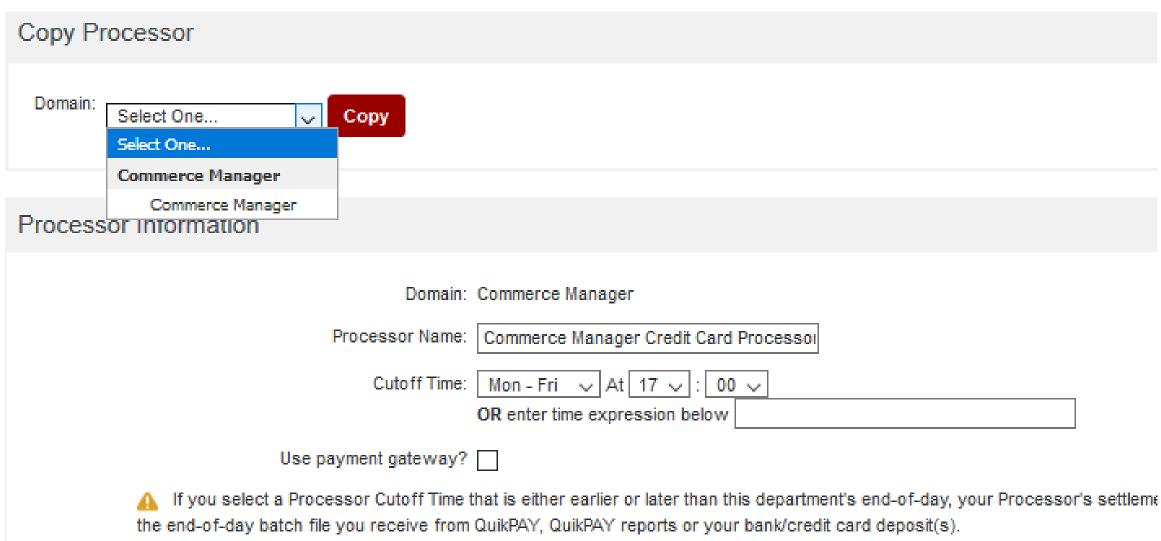
Use a copy of an existing processor if utilizing the same bank account and/or Merchant ID.



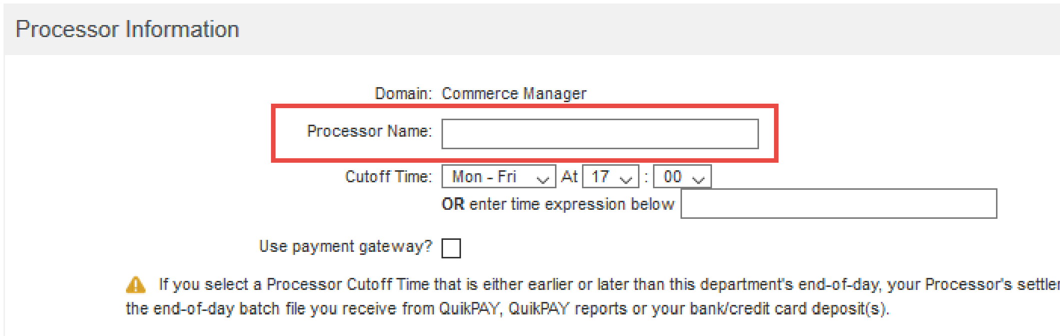
1. From the list of available processors, select the processor you wish to copy.



2. Click on the processor and under Copy Processor menu, select the **Commerce Manager** domain and click **Copy**.



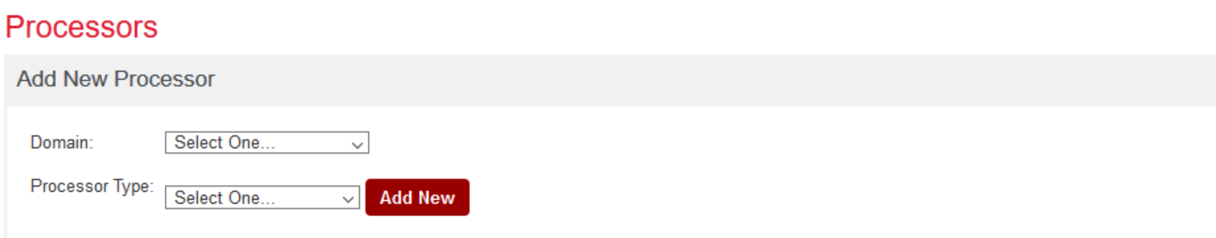
3. Enter a new processor name that correlates with the new Payment Order and click **Save**.



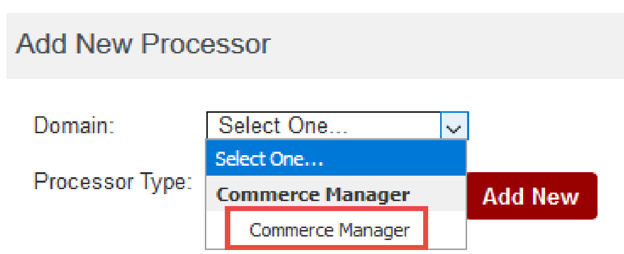
Creating a new credit card processor

To add a new credit card processor:

1. Select **Commerce Manager** as the domain and your processor type (Rapid Connect, TSYS, etc.).
2. Click **Add New**.

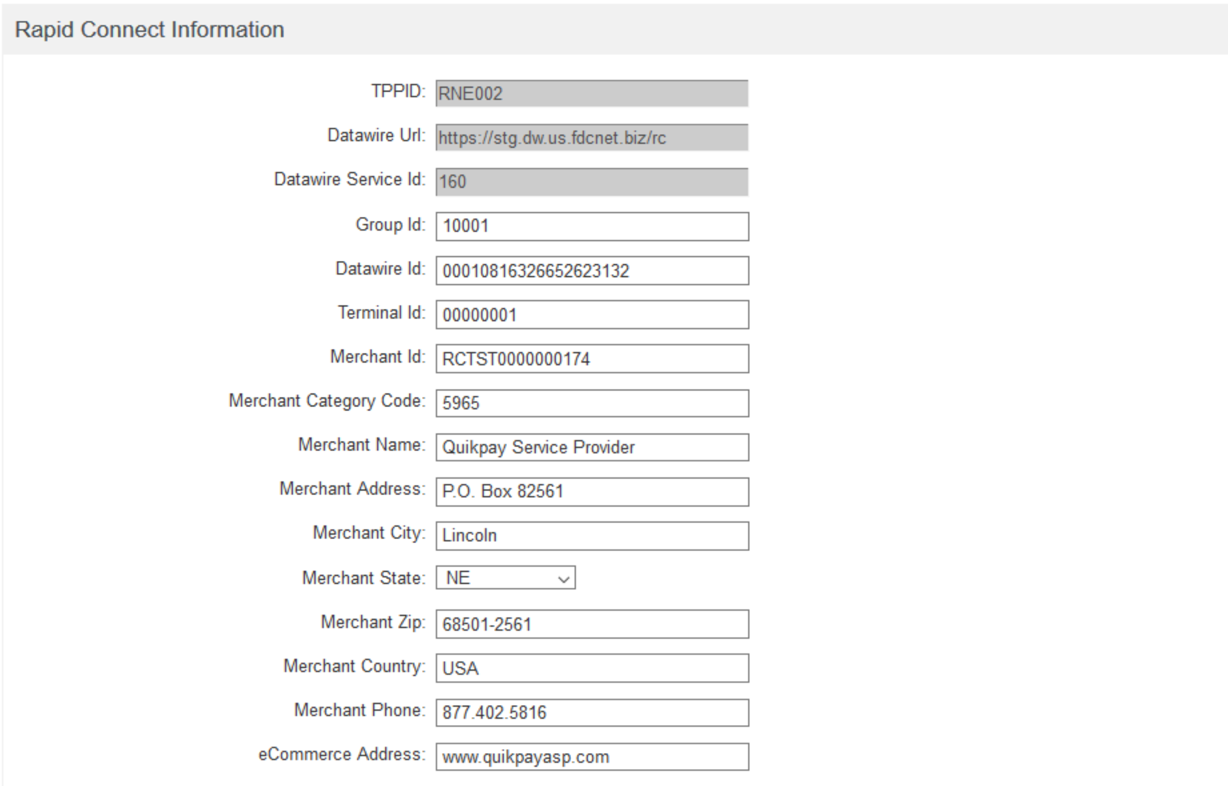


Note: Processors should not be created under a user but rather under the overall domain, e.g. Commerce Manager.



3. Processor type (Rapid Connect, TSYS, etc.) will auto- populate with default values in UAT, these values will need to be changed during the production importing process. Enter a processor name consistent with the Payment Order that you will be creating. Select a cutoff time* (ex. M-F 17:30) and then click **Save**.

   Note: The cutoff time must match your business end of day time.



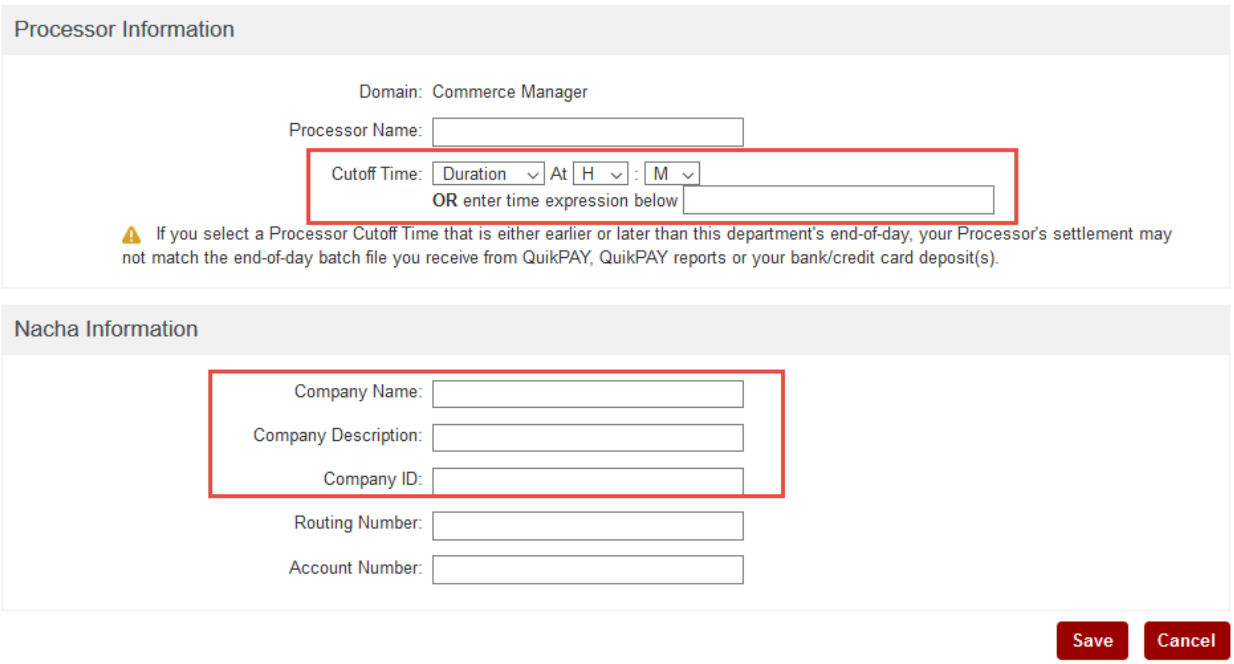
4. Review the processor list and verify the new processor is displaying under “not currently used” section within the Commerce Manager domain. Once a processor is linked to an order, it will be automatically moved from the “not currently used” section.

Creating a copy of a credit card processor

1. To copy an existing eCheck processor, select an existing eCheck processor from the list of processors.
2. Once in the existing processor, select the **Commerce Manager** domain from the Copy Processor section and click **Copy**.
3. Enter the new Processor name associated with the new Payment Order, enter the routing number and account number and click **Save**.

Creating a new eCheck processor

To add a new eCheck processor, please review the Alert below or contact your Nelnet support team. If you want to proceed, follow the steps for creating a new credit card processor, above.

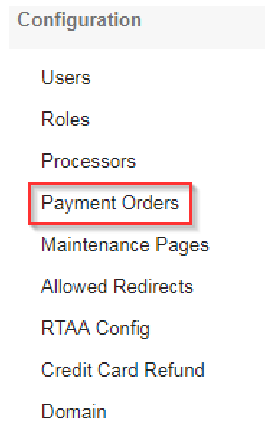


Alert: You may only use one bank account associated with the Commerce Manager domain. When creating an eCheck processor, copy the existing Company ID and include it in the new processor. The Company ID is linked to the bank account and to the batch sent to NACHA for processing. Use an existing eCheck Commerce Manager processor as reference. If you need to confirm the bank and routing number (it must be the same as all existing Commerce Manager eCheck processors), please contact your Nelnet support team.

Orders

To configure a new Commerce Manager order you must be logged in as the Commerce Manager Administrator

To create an order, select Payment Orders from the Configuration menu.



When creating a new order always create it under the Commerce Manager domain and select a user based on who will be making a payment:

- Web public, student, customer = Commerce Manager Payer
- 3rd Party integration = Commerce Manager Payer
- Institution staff, using the transaction terminal in QuikPay = Commerce Manager CSR

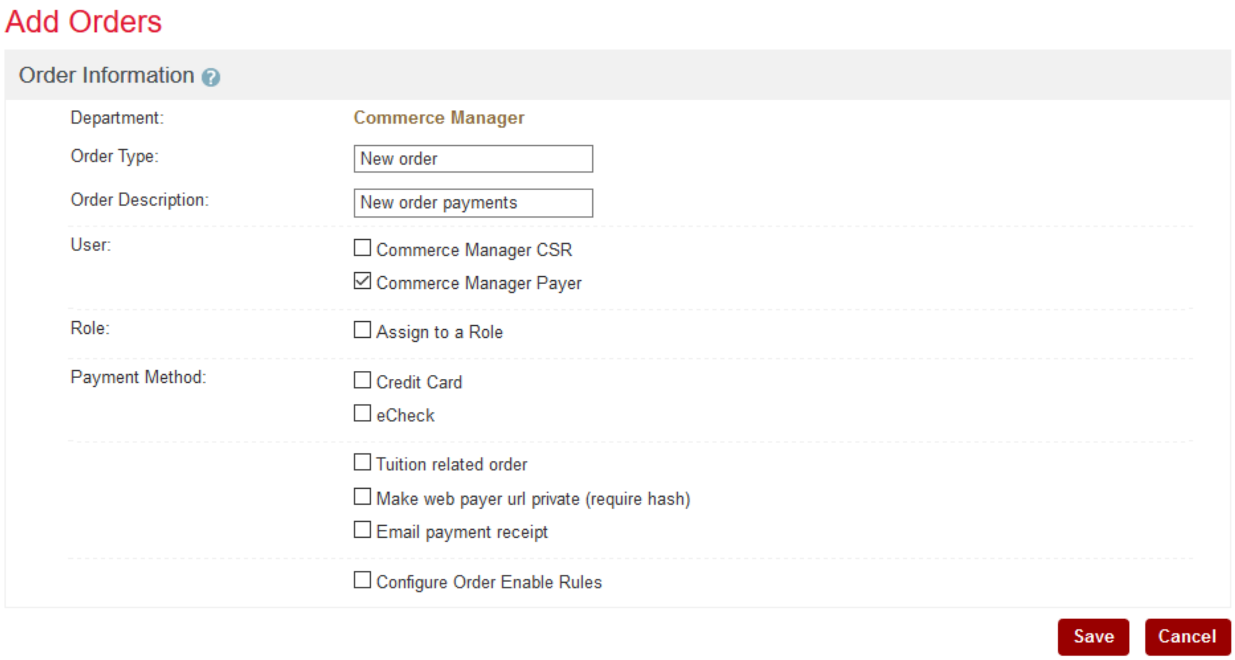
If creating a Payment Order for a CSR to make a payment through the transaction terminal continue to the CSR Order section.

Creating payer orders

1. Click on **Add New Order** and select the Commerce Manager Payer checkbox.

Enter the basic order information: order type, allowed payment methods, and processors. You may link an existing processor and automatically create a processor copy with a new name.

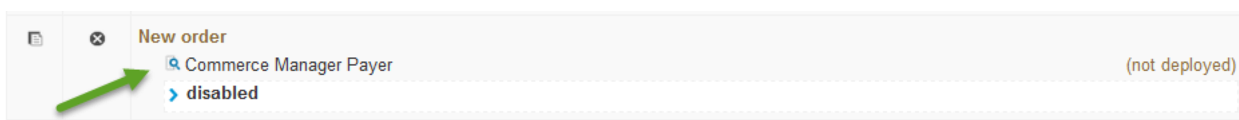
Note: order type is the most important parameter as without it the payer will not be able to access the order. Order type is always included in the CM pass-through and in public CM order links.



Order Sections

Order Information

To configure the details of an order, select the order from the list Configuration -> Payment Orders

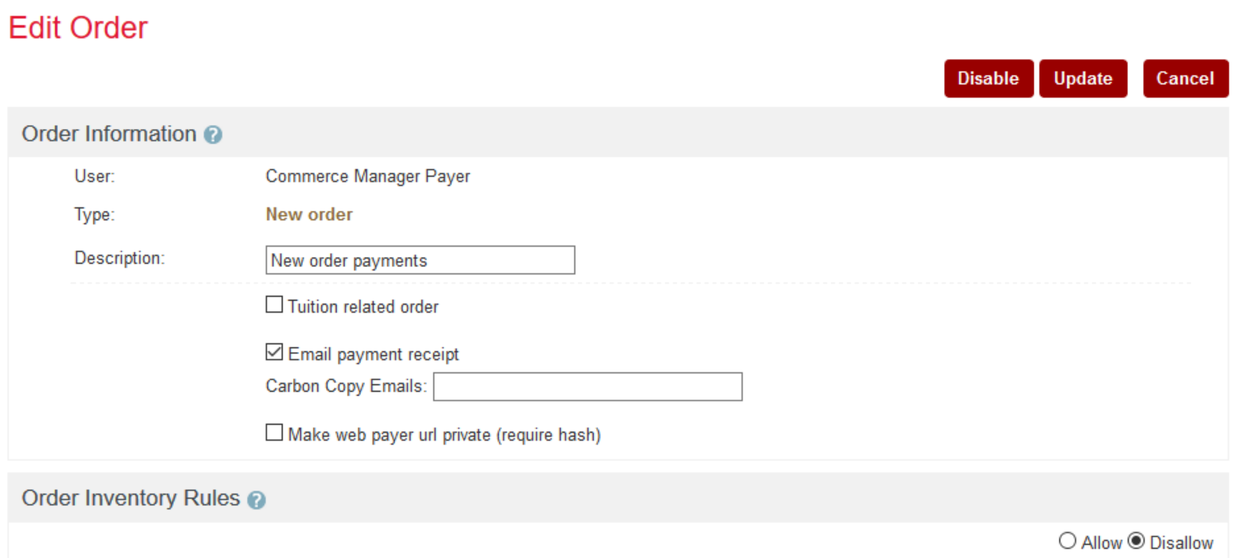


- **User**: will populate a hardcoded value selected on the previous screen
- **Factory Type**: will populate a hardcoded value selected on the previous screen
- **Type**: enter the order type; ensure this is entered correctly and included in the pass-through as the *orderType* parameter. The order type is case sensitive and must match what is configured in QuikPay with what is passed-in with the payer. This value is also used for reporting within QuikPay and returned in RTPN and EOD.
- **Prefix and Suffix**: leave blank

- **Description**: this is a brief explanation of what the Payment Order is being used for and is passed-in with the payer in the pass-through, can be made visible to the payer or staff.

Note: Select Make web payer url private, only if the Payment Order is a private order requiring a hash. For UAT, the shared secret will be 'key'. When importing to production, the production shared secret will be entered. See Appendix A for additional information.

Order Details



- If collecting a Credit Card Service Fee on a tuition-related order, check the Tuition related order checkbox.
- Carbon Copy Emails will send a copy of every transaction receipt to a static email address.
- If the order will be using an encrypted authentication (private order) check the Make web payer url private option. View existing orders as reference. This may also require coordination with your IT resources.

- Order Inventory Rules are used for tracking quantities and setting alerts.

Order Details

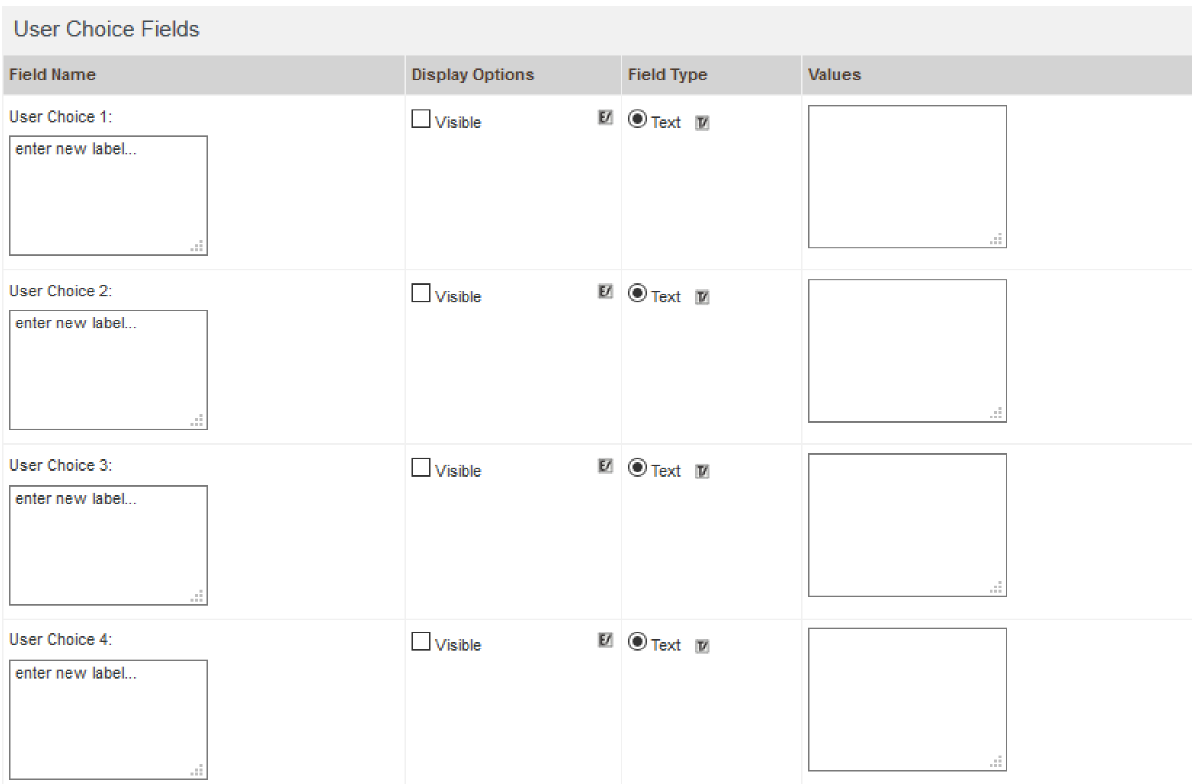
Field Name	Display Options	Field Type	Values
Order Number:	☐ Visible	◉ Text	
Order Name:	☐ Visible	◉ Text	
Order Type:	☐ Visible	◉ Text	New order
Order Description: enter new label...	☑ Visible ☐ Editable ☐ Required	◉ Text ○ Dropdown	New order payments
Order Subtype: enter new label...	☑ Visible ☐ Editable ☐ Required	◉ Text ○ Dropdown	
Order Due Date:	☐ Visible	Text	System Derived
Order Amount Due:	☐ Visible	Text	System Derived
Order Balance:	☐ Visible	Text	System Derived
Order Current Status Amount Due:	☐ Visible	Text	System Derived
Order Current Status Balance:	☐ Visible	Text	System Derived
Order Fee:	☐ Visible	◉ Text	
Order Amount: enter new label...	☐ Editable	◉ Text ○ Dropdown	

- Order Type must match what was listed for Type under the Order Information section.
- Order Description will need to match the Description under Order Information section as well. Display options will determine whether it will be visible, editable, or required for the payer on the payment page.
- Enter a new label under the field name, allows you to display a custom label text to the payer for that particular field. For example Order Amount field can be renamed as Payment Amount.

User Choice Fields and Integration Fields

Utilizing User Choice and Integration Fields, will allow additional data to be included in the order. When applicable, this information will also be included in the RTPN (real time payment notification) response and the End of Day file.

Information in these fields can be: a) sent in the authentication with the payer, b) directly configured in the order (static), c) made editable where the payer manually enters information.

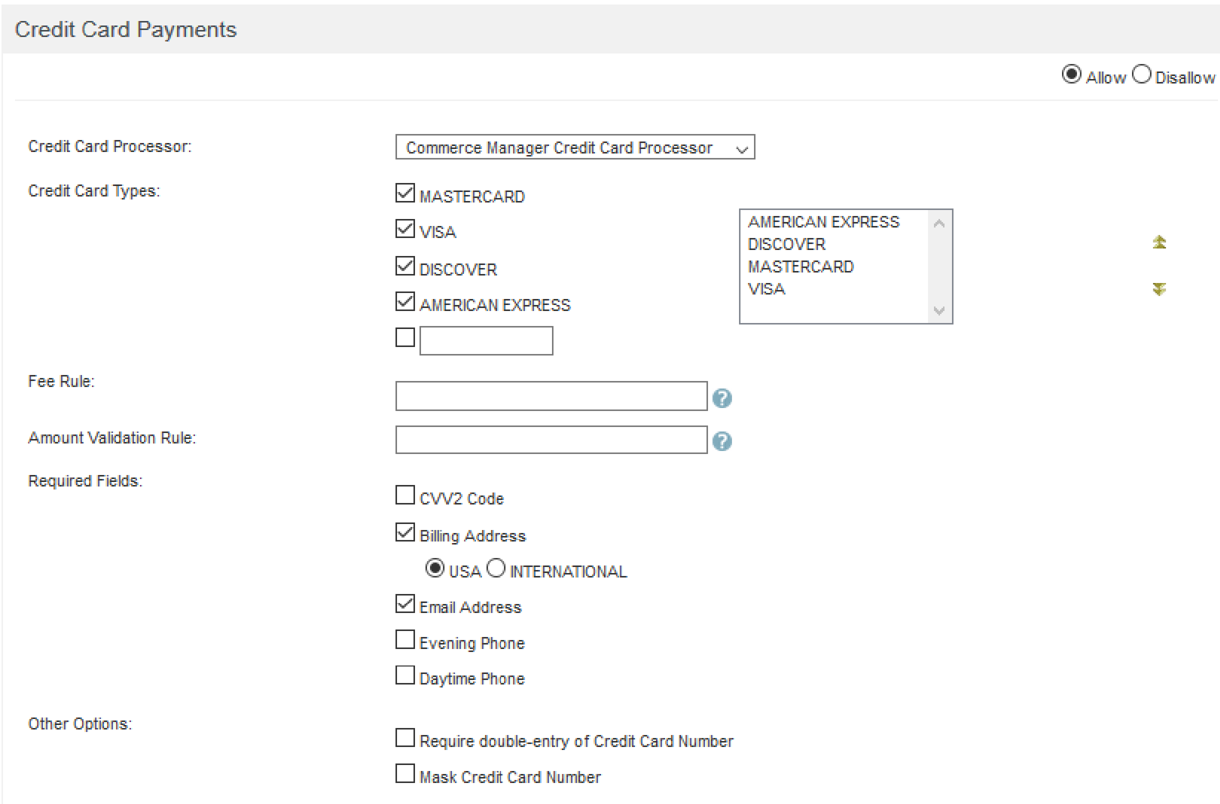


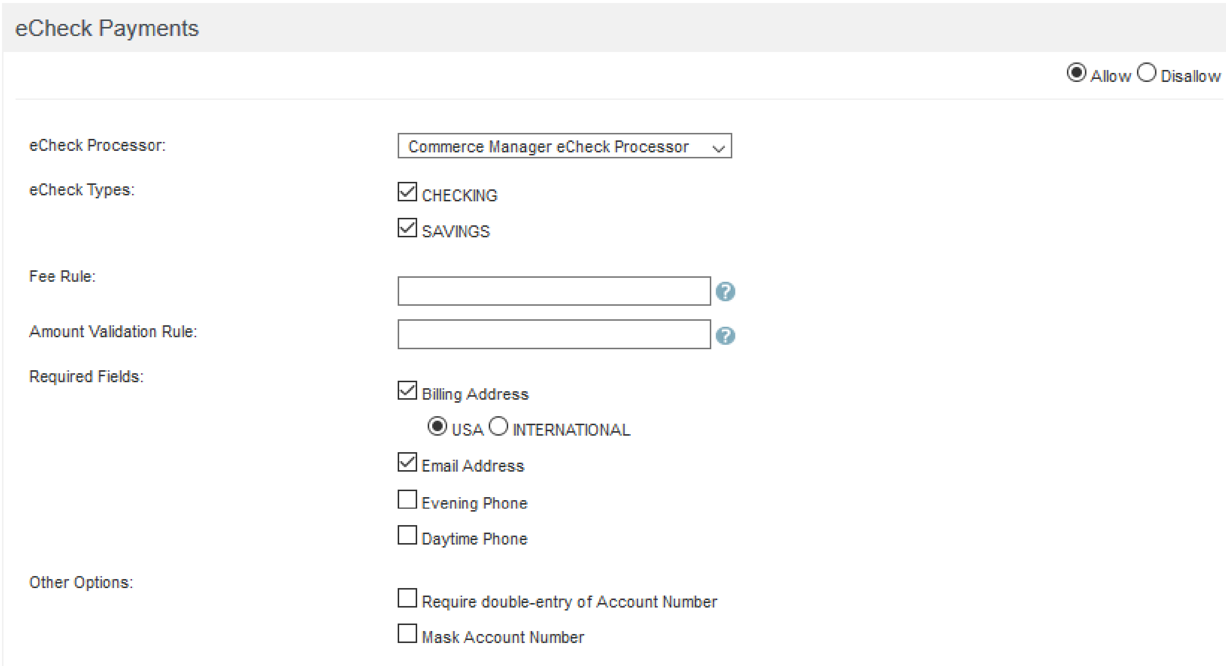
Field Options

Field Options	**Visible:** When checked the field is visible to the user and the administrator is provided a blank 'Field Name' box to enter a descriptive field that displays to the payer.
	Editable: The user can edit/change the value of the field.
	Required: The field is a required field and must be complete before the order is accepted. An error message appears if the information is incomplete.
Field Types	**Text:** A free form field (i.e. Driver's License Number). There is a maximum of 50 characters.
	Dropdown: A list to choose from (for example, Parking Zone, Term, T-shirt size)
	Check Box: A yes or no question (for example, Did you have a permit last year?)

Processors and Transaction Options

1. Ensure that the one-time payment option is selected.
2. Select the credit card and eCheck payment options – click **Allow**. The processors created prior to the Payment Order will be listed in the dropdown.



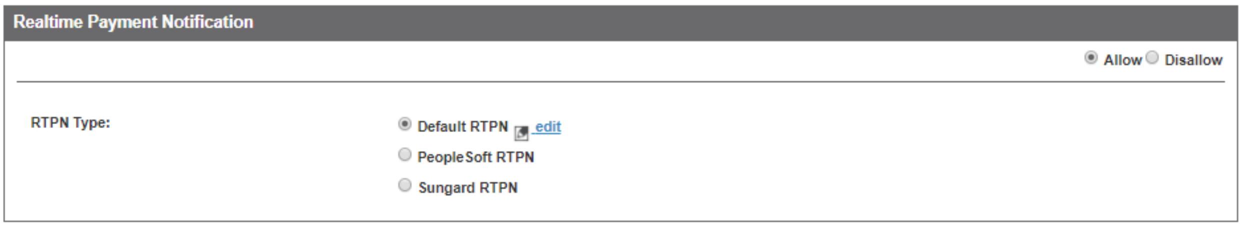


This section also allows you to select specific payment criteria collected during the transaction.

- Types of credit cards accepted and order in which the cards are listed.
- Any amount rules – min/max, etc. Click on the ***?*** icon for additional information.
- Address and phone number collected from the payer.
- Select the email address option if you would like the payer to receive an emailed payment receipt (text configured in the Communication Center).
- You may also require the payer to reenter the account number or the system to mask the number as it's entered by the payer.

RTPN

If utilizing RTPN (Real Time Payment Notification) select the **Allow** option. Select the default option and click edit. If RTPN will not be utilized, keep Disallow selected and click Save to finalize the order.



Note: if this is the first time setting up RTPN for a Commerce Manager order, please contact your Nelnet support team. This is an integration feature and requires IT resources.

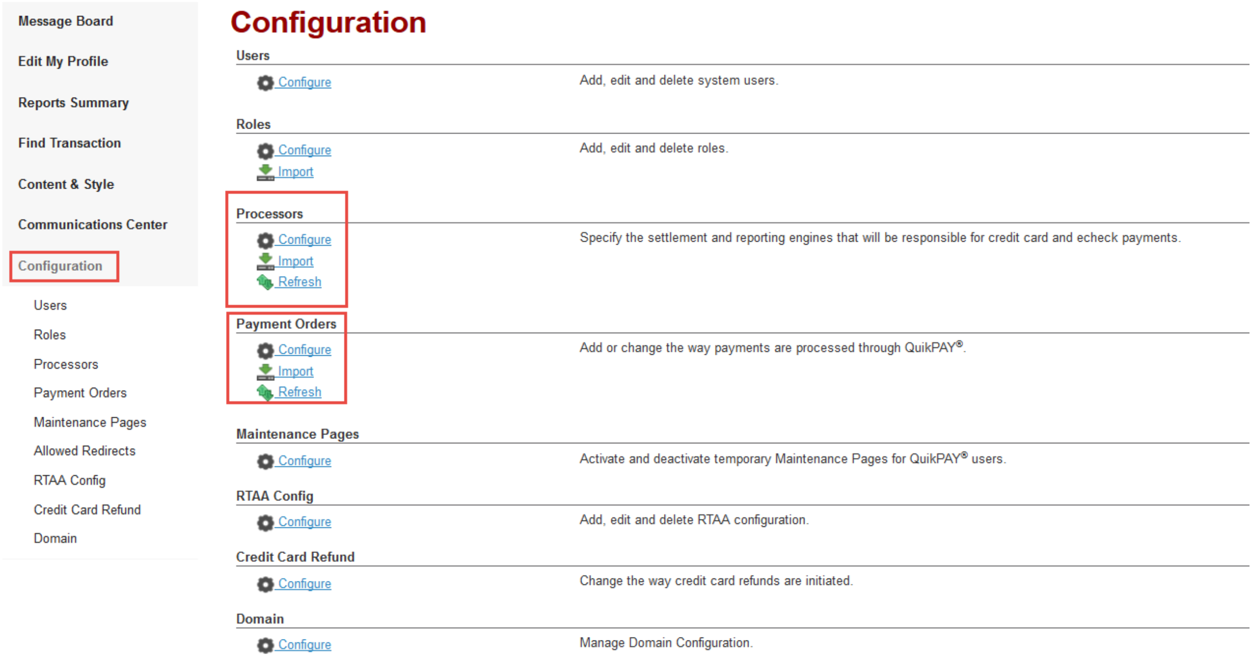
Importing Orders to Production

All orders need to be configured first in UAT and then manually imported into production. During the import process, the system will prompt the user to:

- Enter credit card merchant information (credit card processor)
- Allowed redirect URL – this is for orders using the redirect function
- RTPN URL, shared secret, and notification email – this is for posting payments in real-time

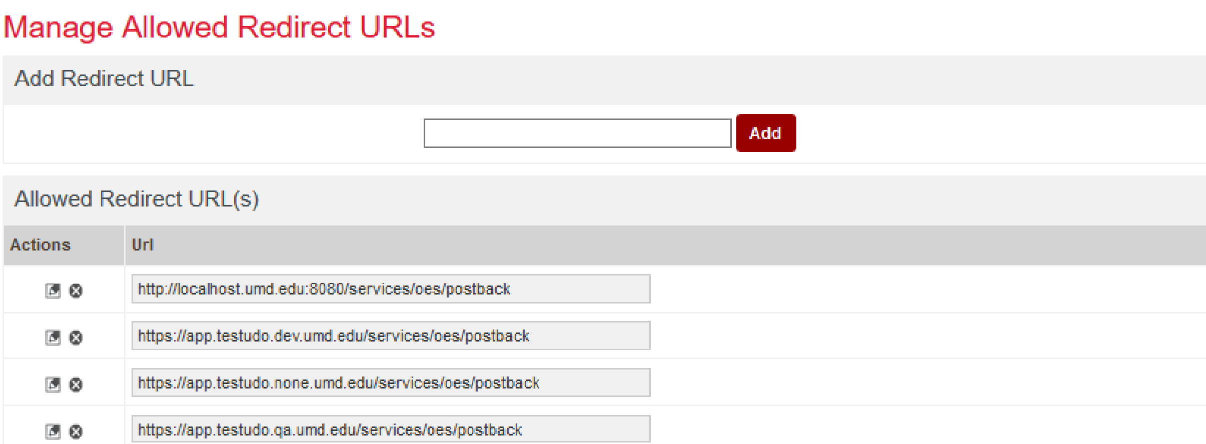
Note: Any necessary updates to existing orders should also be made in UAT and imported into production. The import function for new and updated orders is the same. Settings and configurations in both instances should match.

1. To import an order, login as an Administrator to QuikPay and click on the Configuration menu.



Message Board
Edit My Profile
Reports Summary
Find Transaction
Content & Style
Communications Center
Configuration
Users
Roles
Processors
Payment Orders
Maintenance Pages
Allowed Redirects
RTAA Config
Credit Card Refund
Domain
Configuration
Users
Configure
Add, edit and delete system users.
Roles
Configure
Import
Add, edit and delete roles.
Processors
Configure
Import
Refresh
Specify the settlement and reporting engines that will be responsible for credit card and echeck payments.
Payment Orders
Configure
Import
Refresh
Add or change the way payments are processed through QuikPAY®.
Maintenance Pages
Configure
Activate and deactivate temporary Maintenance Pages for QuikPAY® users.
RTAA Config
Configure
Add, edit and delete RTAA configuration.
Credit Card Refund
Configure
Change the way credit card refunds are initiated.
Domain
Configure
Manage Domain Configuration.

2. Importing the new or updated processor(s).
    A. Click **Import** under the Processor section. A list of new and updated processors will be displayed. Select the processor to be imported and follow steps on each presented screen.
    B. Next, select the order(s) to be imported. Click on the Import link under the Payment Orders section (you may also click Import under the Processors section, all objects to be imported will be listed).
    C. Select the order to be imported and follow steps on each screen presented. When prompted to enter Allowed URL, you may add it during import or click Continue and later manually add it under Configure – > Allowed Redirects (see the Redirect URL section below).



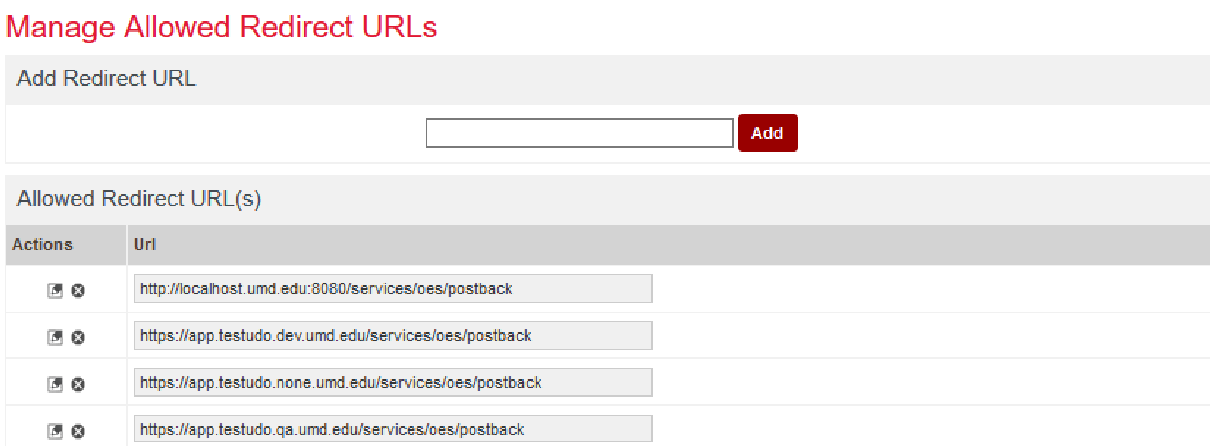
3. If real-time is utilized, you will enter the production RTPN values. Verify any system populated values are correct.

Redirect URL

For redirect to properly work, please allow the redirect URL in the appropriate QuikPay environment.

1. Log-in as an Administrator, click **Configure – > Allowed Redirects**

2. Enter the URL and click Add. All allowed URLs are listed below under Allowed Redirect URL(s)

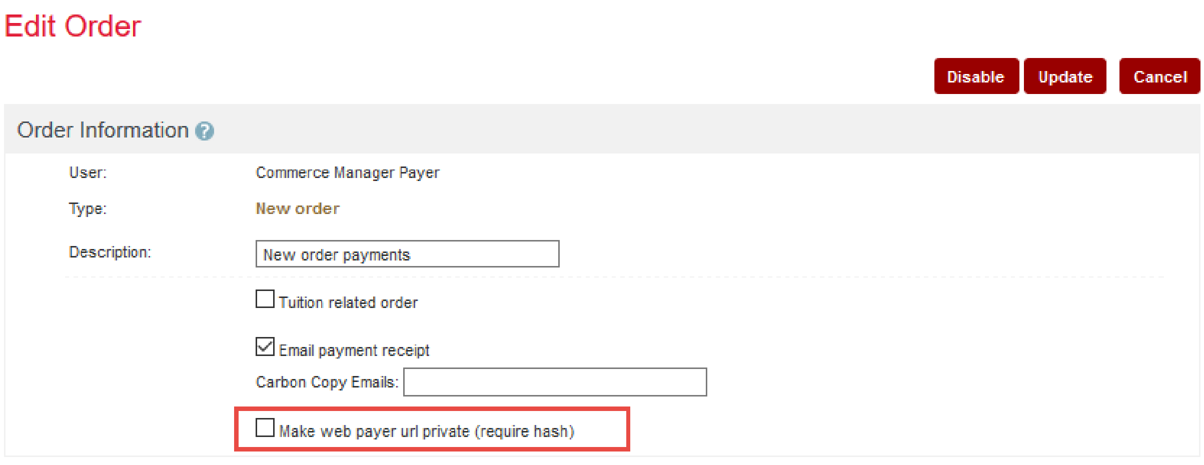


3. To edit or delete a URL click on the  under the Actions column.

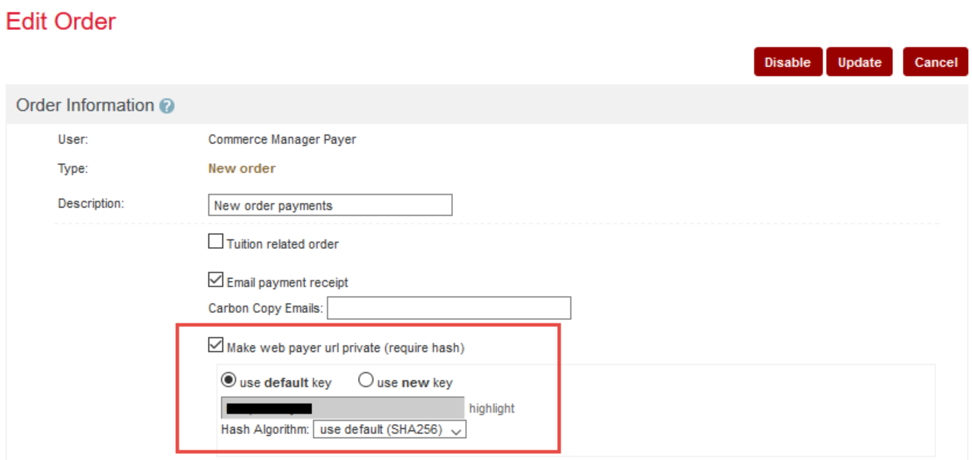
Order Checklist

Once the import is complete, review the new order in production be reviewed and verify the following:

- Is the processor created under the correct domain?
    - Never create processors under a user; always under the domain, e.g.: Commerce Manager. View the processor section above for additional details.
- Is the correct processor linked with the order?
- Is the order created under the correct domain and payer type?
- Is the order type correct?
- Is the order description correct?
- Is the public or private url selected?
    - If public, make sure the Make web payer url private unchecked.



- If private, is the shared secret correct?
- Is the algorithm correct?



- Confirm the Order Details section:
  - Order Description
  - Labels for each Field Name displayed
  - Order Amount should be unchecked because the amount is being passed-in with the payer

Alert: If building a public order (no authentication) that does not include a passed-in payment amount, check the **Editable** box to either allow the payer to manually enter the payment amount, configure a static amount in the order, or configure a dropdown list of different payment options available to payers. Refer to the *QuikPay Commerce Manager User Guide* for additional details or contact your Nelnet support team.

- Verify all User Choice Fields and Integration Fields
  - Are the correct fields configured, made visible or not?
  - Are the correct fields included in the EOD file?
- Is the Onetime Payment option allowed?
- Is the Email Address field selected under the processor? (Configure only if you want the payer to receive an emailed notification.)

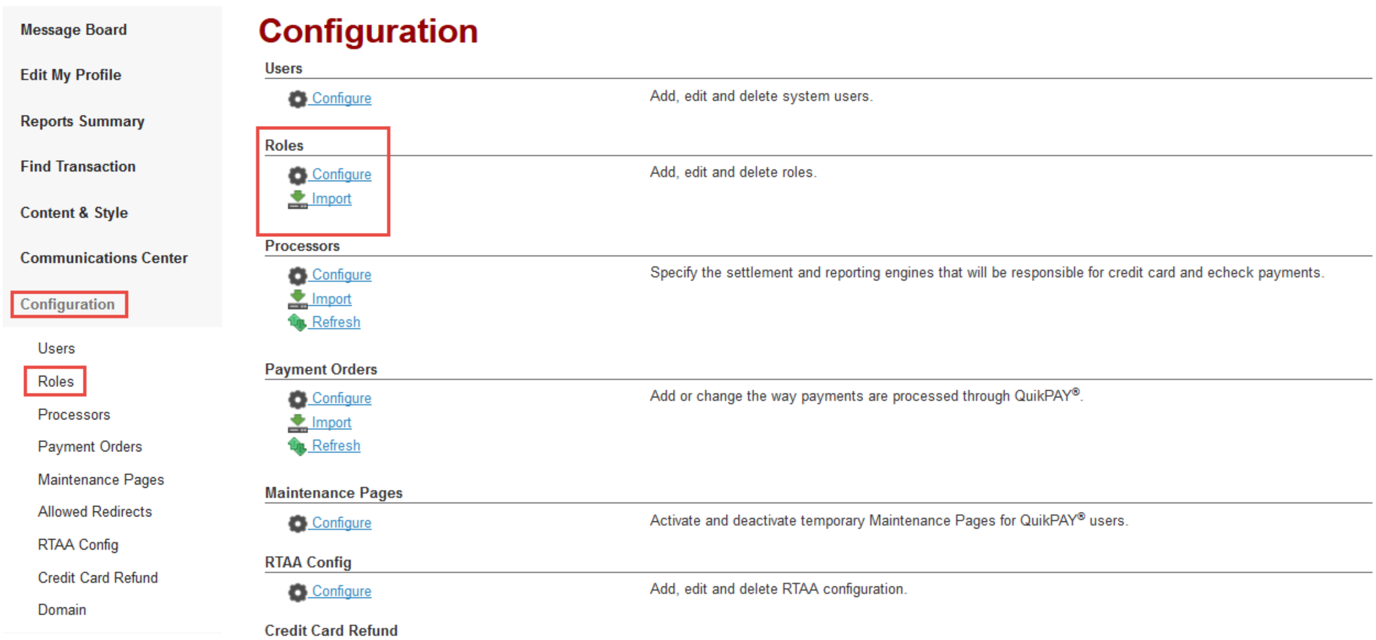
- Should the order use RTPN?
    - If no – make sure this option is disallowed
    - If yes – make sure the following options are correctly configured:
        - Default RTPN option selected
        - Correct URL entered – based on module and environment (where payment is posting)
        - Correct shared secret entered – based on order and environment
        - Transactions to Notify: most orders will only use the Real-Time Payment options, some may use the Refund option. Do not configure the real-time Scheduled Payment option.
        - Response Code: must be In Body: success and failure (this may depend on your integration, work with IT resources)
        - Parameter List: Standard
        - Shared secret: “key” in test, check for the correct key in production
        - Algorithm: always SHA256
        - Unknown and Error Notifications: make sure correct distribution/email addresses are configured. QuikPay will send error posting notifications to the configured groups/individuals.
        - Verify all RTPN Parameters are displayed in the list and appropriate parameter labels entered.

Roles and Users

The Administrator role can create new users and assign roles. The main functionality that is controlled by a Role is reporting and the ability to access transactions specific to an order.

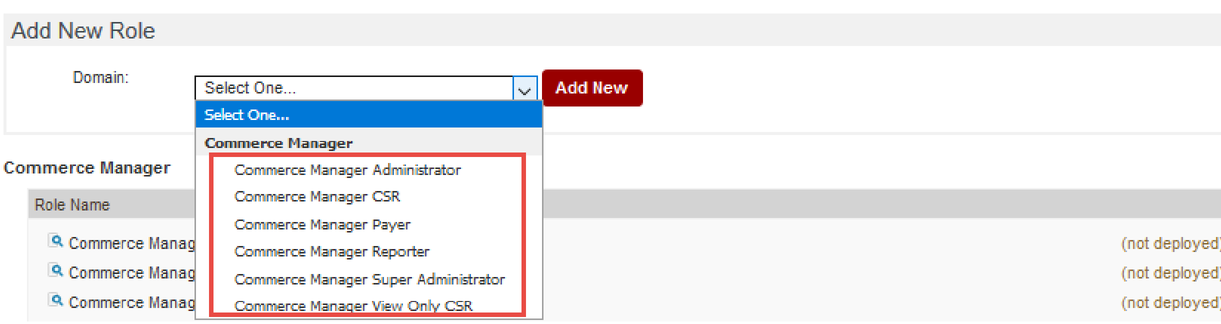
- The recommended user types to be managed by Roles are CSR, VOCSR, and Reporters.
- Roles are first created in the UAT instance and then imported into production.

1. To create a new role, login as an Administrator and click on **Configuration - > Roles**.

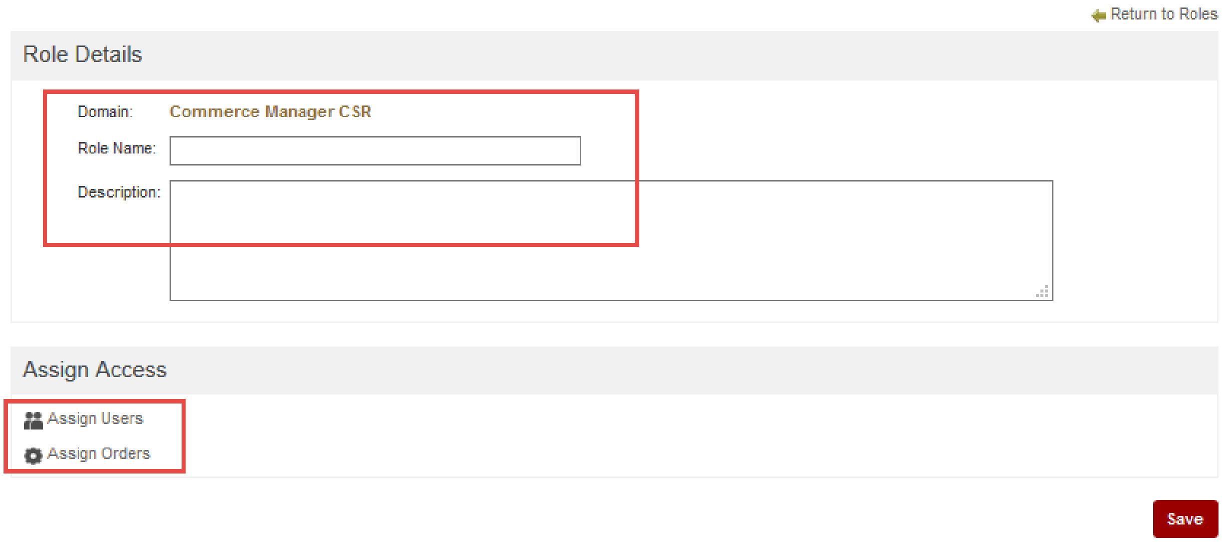


2. From the dropdown, select the user type associated with the new role and click Add New.

Note: Do not create roles for Payers.

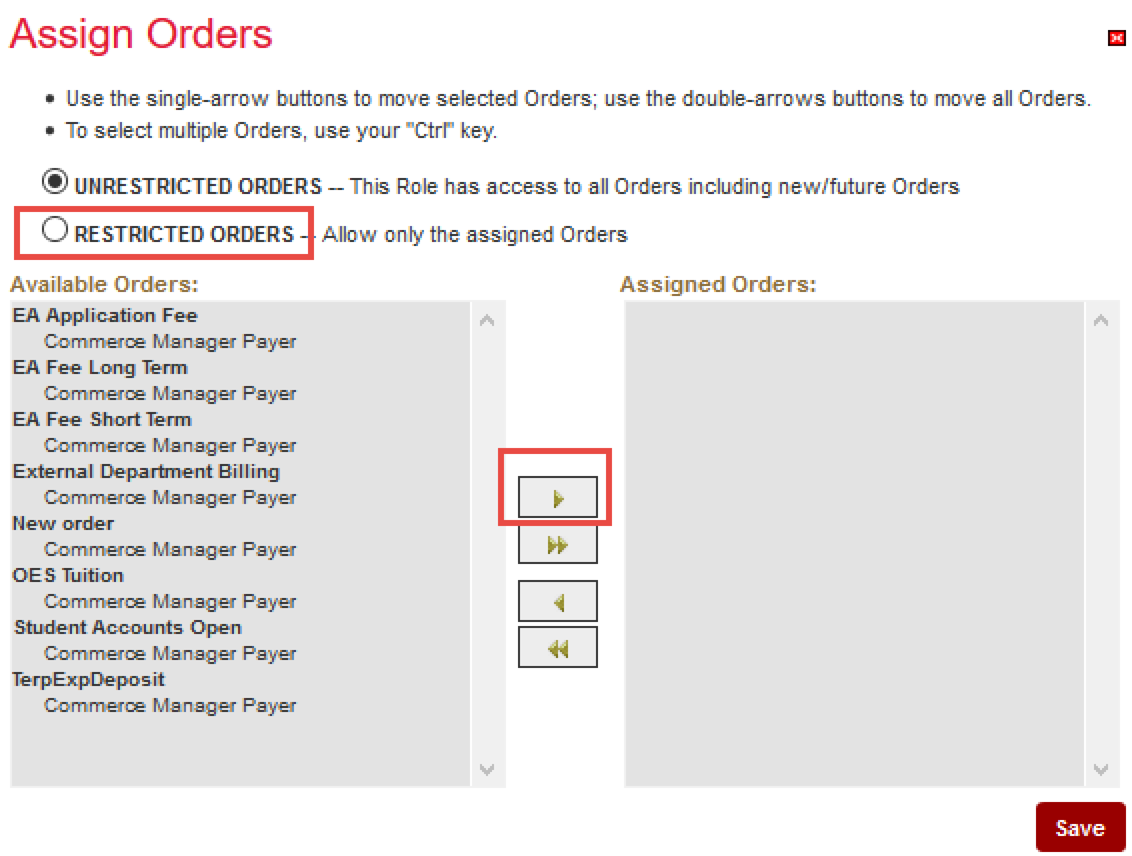


3. Add the role details – include the user type in the Role Name and a brief description as it will help with future identification and maintenance.

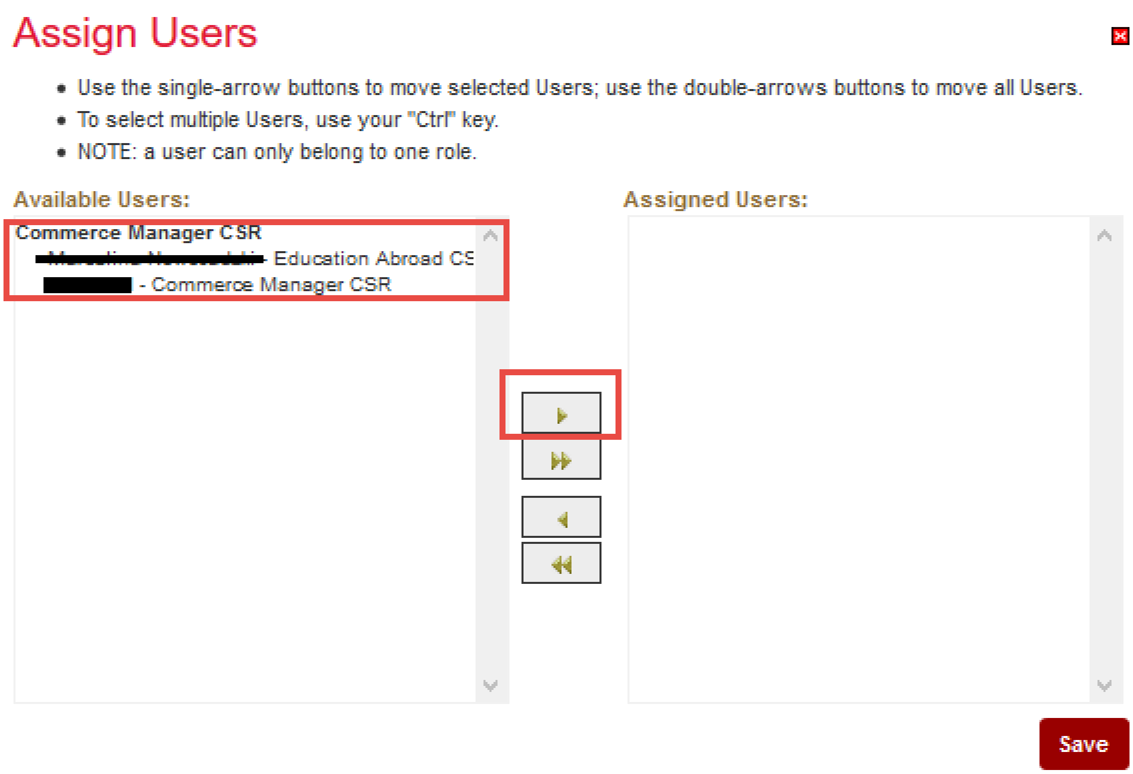


4. Click on the Assign Orders link and select all orders that should be allowed for this role to manage/view.

   Whatever order is assigned to the role, the user will only be allowed to report or search transactions associated with that order set.



Specific individuals can be assigned during this process as well, or if the user is not yet created, you may select the role during the new user setup process.



List of QuikPay URLs:

UAT Environment

Root Users

https://uatquikpayasp.com/rutgers/root/administrator.do

https://uatquikpayasp.com/rutgers/root/reporter.do

Commerce Manager Users

https://uatquikpayasp.com/rutgers/commerce_manager/administrator.do

https://uatquikpayasp.com/rutgers/commerce_manager/reporter.do

Production Environment

Root Users

https://quikpayasp.com/rutgers/root/administrator.do

https://quikpayasp.com/rutgers/root/reporter.do

Commerce Manager Users

https://quikpayasp.com/rutgers/commerce_manager/administrator.do

https://quikpayasp.com/rutgers/commerce_manager/reporter.do