

University of Utah Financial & Business Services

UMarket Step by Step Guide

UMarket Shopping Cart How-To

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Contact Income Accounting and Student Loan Services if you have additional questions.

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UMarket Step by Step Guide to the Shopping Cart

Log In to Admin Module

- Click on link: <https://umarket.utah.edu/um2/admin>
- Save to your favorites or bookmark
- Enter your uNID
- Enter your CIS password
- Click Log In
 - If you have more than one shopping cart, you will need to click on the App_Type # (aka UMarket Account #).
- To find the URL to your shopping cart, click on the **View Tab** at the top right corner of the admin module.
 - For multiple App_Types, the URL to each cart will appear on the first page when you log in.
- Copy the URL in the browser, and paste onto your website. A hyperlink on the website is preferable to just the text link.
- From the Admin Home page you can see your most recent transactions. To view all transactions click on **Orders** in the left side menu, or click on the link **View All Orders** below the list of orders.
- You may also **View All Products** or select **Products** from the left side menu.
- The admin page will show you the **Top Customers** based on \$ spent, and the **Recently Added/Updated Products**

Store Logo – click on the “View tab” at any time to see your saved updates

- **Customize a logo**
 - Click on **Store Settings**, then **Company Info**
 - Default Settings:
 - Company URL = Department URL (if logo is clicked on by the user, this will take them back to your department website)
 - Theme = choose a color for the top banner of the shopping cart from the drop down menu
 - Display Watermark = check or uncheck the box to display the University watermark in the banner
 - Overwrite Default of Company Name | University of Utah
 - enter a prefix, Department Name, and Parent Organization (i.e. The University of Utah, School of Medicine)
 - Choose the Block U, the HSC Cadusis, or None
- **Use a Custom Logo**
 - Click on **Store Settings**, then **Upload Custom Logo/Banner**
 - Click on the **Browse...** button
 - Find your saved image on your computer and double click, or select and click on **Open**
 - Click on **Start Upload**
 - If upload is successful the logo will appear
 - If you receive an error, try to reduce the size of your image

- To reduce, open the image in Microsoft Paint, click on **resize**, reduce by 50 percent & maintain aspect ratio, click **OK**
- Continue to reduce by 50 or 25 percent until you reach the desired size.

Using the WYSISYG (what you see is what you get)

• Homepage Content

- Use like a Word Document to enter information on the home page
 - Appropriate home page content: shopping cart title, event title, a summary of shopping cart purpose, instructions on navigating the shopping cart, your refund policy, pictures, posters, pamphlet information etc.
 - Use **Format** and **Styles** drop downs to change the font sizes and styles.
 - Insert link – highlight the key word to the link
 - click on the link icon 
 - enter the link URL
 - change the **Target** to **open in a new window**
 - type in title of the link (required by ADA)
 - class is not required
 - Save by clicking on **Insert**

• Left Navigation Links

- Create links to other sites (i.e. sponsors, associated contributors).
- Create links to related University or Department web pages.
 - Click on the **Styles** drop down menu, select **leftNavLink**
 - Insert link – highlight the key word to the link
 - Click on the link icon 
 - enter the link URL
 - change the **Target** to **open in a new window**
 - type in title of the link (required by ADA)
 - class is not required
 - Save by clicking on **Insert**

• Insert Images

- To use UMarket Image Database, see **Upload Images**
- Click on the Icon that has a tree on it
- Enter in Image URL
- Enter Title
- Click on **Insert**

Email Settings

- From Email Address= your email address (as the administrator), or a department email address that you can monitor for transaction notices.
- Mail Format
 - Use **Multi-Part (html + text)** if you want a highlighted header and footer on the email. You can also insert links in the header or footer. All other information will be text only.
 - **Text Only** will not allow you to put links into the header or footer.
- Order Notification
 - There is a customer order notification AND a merchant notification. This can be used for pay with check registrations, or \$0 registrations or in conjunction with credit card payments.
- Payment Notification
 - Both you and the customer can receive a payment notification. This notification is sent when the credit card payment is approved; usually immediately at the time of the transaction.
 - If you have a pay by check registration, you can change the status of their registration within the order to “Paid in Full”. See **Manage Orders**
 - Once you change the status in the order, the payment notification email will be automatically sent to the customer and you.
- Customer Ship Notification
 - This notification is only sent if you change the status of an order to “Ship”. You, the merchant, will not receive an email notification, only the customer.
- Email Heading
 - The heading is used as a title for the receipt. You may put in a note to the customer or just the name of your department or event.
 - Use the **Text Heading** or the **HTML Heading**, depending on the mail format you chose. HTML has a WYSIWYG for formatting and inserting links.
- Email Signature
 - This is the footer and may be used as a “Thank You” message.
 - Use the **Text Signature** or **HTML Signature**, depending on the mail format you chose. HTML has a WYSIWYG for formatting and inserting links.
- Order Received Intro & Footer
 - Appropriate text includes, thank you statements, contact information for questions, refund policies, and instructions.
 - Pay by Check orders will receive this Order Notification. Provide instructions and an address for mailing their check payment.
 - Intro & Footer are **text only** fields
- Order Paid Intro & Footer
 - Appropriate text includes, thank you statements, contact information for questions, refund policies, and instructions.
 - Intro & Footer are **text only** fields
- Order Shipped Intro & Footer
 - Appropriate text includes thank you statements, contact information, refund policies, and instructions.
 - Intro & Footer are **text only** fields.

Custom Labels

- **All Products** Link Text = customer may click on this link to view all products offered in the cart. You may wish to call this link “All Courses” or “Register Here” or something else.
- **Store Home** Link Text = customer can return to the shopping cart home page. You may wish to call it something else. Type text here.
- Subproduct Section Title. A subproduct is offered on the same page as another product. The default calls it **Additional Items**. You may use this as an “up-sale” tool. For example: If someone registers for a course, they may also be interested in an upcoming course, an event t-shirt, or a syllabus. Use the subproduct to allow them to add this additional item to their cart at the same time as their registration. You may wish to call it something besides an “Additional Item”.

Discounts

- If you would like to offer discounts contact Stu Schragger @ 1-5764 OR stuart.schrager@income.utah.edu to add this option.
- **Add Discounts**
 - Click on **Add New Discount**
 - Enter a simple and unique reference ID
 - Give the Discount a Name (i.e. multiple course registration, Early Bird Registration, etc.)
 - **Optional-** give a brief description of the discount (i.e. Register for 2 or more classes to receive 10% off each class.)
 - Promotional Code = can be used for limited time promotions or discount by invitation only. It requires the customer to enter the correct code in order to receive the discount.
 - You may set a **start date** and an **end date**. Keep the end date blank if the discount does not expire.
 - Limit how many times the discount may be applied in each order. ***Note:** We cannot limit customer uses as we do not have customer accounts.
 - Discount Calculation = apply the discount by **Product** or by **Order Total**.
 - Enter the amount of the discount – either a **flat amount** or a **percentage**.
 - Global Discount = applies to the whole shopping cart
 - Exclusive= Check this box to limit the discount so it may not be used with any other discounts. Leave blank if you want to allow a customer to use more than one available discount at a time.
 - Discount Priority: Use only if you have exclusive discounts. If a customer tries to use more than 1 discount you can choose which one to allow them to use, like the better of the 2 discounts.
- **Conditions**
 - Conditions allows you to set how the discount can be applied
 - Cart Total = apply the discount to the total of the cart. You can also set a minimum dollar amount they must spend for the discount to apply.
 - Cart Quantity = apply the discount only if a certain # of items is in the cart. Set the minimum and or maximum
 - Item Quantity = apply the discount only if a certain item is in the cart by the minimum that you set. (i.e. buy 2 t-shirts and get the third free – they must have 3 t-shirts in their cart.)

- **Associated Items**
 - If the discount applies to products, and not the whole cart, you must “associate” the discount with the product.
 - Use the drop down to select the association method – **product, categories, or skus**.
Examples:
 - Product = discount applies to the whole product
 - Category = discount applies to all courses, not courses and t-shirts
 - Skus = discount applies to only black t-shirts, not the red or grey t-shirts.
 - Add Associated Products, Skus, or Categories
 - Click on **Go** to bring up everything
 - Or you may search the by **product name, category name, or sku id**.
 - Check the boxes to add the items and then click **Add Selected**.
- **Usage History**
 - See how many times discount was used, and who used it. This tab only appears after a discount has been used by a customer.
- **Archive Discounts**
 - If you discontinue a discount, you may **archive** it so it is no longer visible with your active discounts. This will save the historical data.
- **Active Discounts**
 - Click on the **Edit Pencil** to make any adjustments to your active discounts.
 - Deactivate a discount by giving it an **end date** or **archive it**.

Extra Fields

- Extra fields are used to gather information from the customer based on the product they are purchasing. This is especially helpful for individual conference registrations. Extra fields will not determine pricing differences. **See Options** for pricing variance within a product.
- There are several common extra fields set up by default.
- **Manage Extra Fields**
 - Click on the **Edit Pencil** to change your extra fields.
 - Use numbers to put the extra fields in the order you want them to appear if added to a product. Type the numbers under **Sort** and **save changes**.
 - You can re-order the fields within the product once you have added them.
 - Delete fields you will not use by clicking the **delete box** to the fields and **save changes**.
 - The Products field shows you how many products are using the extra fields.
 - Help= you can set up hints for the customer to complete the extra fields. The customer may click on the **question mark (?)** to see the hint.
- **Add New Extra Fields**
 - Click on the **Add New Extra Field** button
 - Item Name=The question you want to ask.
 - Sort order = you can order it now or later after all fields have been added.
 - Form Input Type = This is how the customer will answer your question.
 - Text Field = a box to type in an answer (35 characters long)
 - Numeric Field = they can type in an answer which is limited to numbers only. If you want to allow numbers and letters, like a UNID (u0456098), use the text field.

- Text Area = allows for the customer to type in a long answer, such as an additional answer or short essay question. Limited to 45 characters and 5 rows by default. You may increase those parameters.
 - Checkbox (single) = checked only if they need that item or service (i.e. Do you need wheelchair access?)
 - Checkbox Group = list of checkboxes so they can select all that apply. Be sure to give instructions in the Item Name – check all that apply or check one
 - Radio Group = yes or no answers or they may choose one of two possible answers
 - Select list = provides a list of items in a drop down menu. The customer may choose only one.
 - Multiple Select list = provides a list of items in a drop down menu. The customer may choose more than one answer.
- Possible Values = to be used when giving the customer items to choose from. Includes all Form Input Types except Text Field, Text Area, and Numeric Field.
- Each choice must be a Name and Value pair. The Name is what the customer sees; the value is what will show on their order in UMarket. If there is no value, you will not get the answer in their order information.
 - The name and value pair should be the same. Type the answer twice with the vertical line in between. The vertical line sign in the key below the backspace key on your key board. It may appear on the key as 2 small vertical lines.
 - Each **Name|Value** pair must be on its own line. Just press enter to go to the next line.
 - i.e. Item Name = Lunch Preference,
Form Input Type= Select List
Possible Values= None|None
Chicken|Chicken
Beef|Beef
Fish|Fish
Vegan|Vegan
 - Help Description= Allows the customer to see an explanation of what the extra field is asking for and how to answer it. This is optional.
- **Add extra fields to Product**
- Extra fields can be added to products at any time – during product creation, or edit an existing product.
 - Click on the **Extra Fields Tab** within the product.
 - Click the **Add** check box and then save by clicking the **Add Extra Fields** button at the bottom of the page.
- **Hint** – when using extra fields for individual registration information – set **Hide Quantity** to **Yes** on the **product details tab**. The customer may add another registration from the cart page, but only one person’s information is gathered at a time.

Categories

- Categories can be broad or general
 - Each course can be its own category with one or more products
i.e. Yoga
Pilates
Aerobics
 - A category can be a description with one or more products
i.e. Exercise Classes
Healthy Eating Courses
 - **Main Categories** = most categories will be main categories. They show on the left side of each page with in the store front.
 - **Secondary Categories** = used to refine a search for a product
i.e. Yoga (main category)
Beginning Yoga
Intermediate Yoga
Advanced Yoga
 - Secondary Categories can also have multiple products listed under them.
 - Beginning Yoga
 - Beginning Yoga – 10 day Punch Card
 - Beginning Yoga – 1 month Punch Card
 - Beginning Yoga – 6 month Punch Card
- **Add New Category**
 - Give the category a name
 - **Optional** – give a description of the Category
 - **Number** the order you want the categories to appear. Can be done at a later time in the list of categories once all categories are created.
 - **Save Changes**
- **Add New Secondary Category** - same as above
- **Edit Categories**
 - Add a description by clicking on the **edit pencil**
 - Change the name of the category
 - **Number** the categories in the order you want them to appear. The number shows a decimal point – ignore it.
 - **Archive** in order to save the category for later use
 - **Delete Category** if you are not going to use it. You may delete categories if you have had transactions. The database will save all info on the completed orders.

Options

- Options = used to narrow down product information OR to determine a pricing structure
i.e. Product= Emergency Medicine Course
Option Group = CME Courses
Options= MD
Nurse
PA

- **Add new Option Group** = name of your option, should be a general term such as “Size” or “Color”.
 - Give a description of the option – not necessary
 - **Number** order the option groups if you have multiple option groups
 - **Save Details**
 - **Status** will default to **active** once the option group is saved. The status may be changed at any time.
 - **Name and order the options** (descriptions are optional).
 - i.e. Option Group = Color
 - Options = Red
 - Green
 - Blue

Create Products

- **Enter product details**
 - ID (Part No.)= A unique ID such as a number or an acronym. If using the product from year to year, do not use dates or you will have to create a new product each year.
 - Display Name = name of the product that the customer will see
 - Chartfield = use the drop down to **select the chartfield** this product will deposit into.
 - You may have one or multiple chartfields. Send additional chartfields to stuart.schrager@income.utah.edu with your App_Type.
 - If this product is a donation, click the box next to **Is this a gift?** The Development office’s chartfield will be automatically selected.
 - Gift Chartfield = will instruct Development where to transfer the donation once they have accounted for it.
 - Non-Gift Chartfield = use only if the product is a gift and there is a non-gift portion of the amount of the product. This instructs Development where to transfer the non-gift portion of the amount.
 - i.e. Product = Fundraising Dinner @ \$75
 - Gift Portion = \$50
 - Non-Gift Portion = \$25 (covers the cost of the food & event)
 - Chartfield Memo= you may give Development further instructions or notes in this field. Only use if the product is a gift or partial gift.
 - Appeal Code = may be obtained from Development so you may track a specific event and how much money you brought in for that event vs. other events you may have.
 - Show In Store = default is **YES**. You may set up products in advance without them showing in an active cart by setting this field to **NO**. Re-set the field to **YES** to activate the product on the store front.
 - Sub-Product Only = default is **NO**. Change to **YES** if you want this product to be available **ONLY** in association with another product. Keep the setting to **NO** if you want the product to be available as its own product, or as its own product **AND** a sub-product.
 - Hide Quantity = default is **NO**. Change to **YES** if you are gathering registrant specific information with extra fields
 - Charge Shipping = default is **NO**. Change to **YES** if you will be shipping this product.
 - Tax Group = default is **NO TAX**. This setting only applies to merchandise. Please pre-determine if tax groups apply to you merchandise by contacting [Tax Services](#).

- If you have created tax groups within the **Shipping/Tax** section, a drop down will appear so you may select the tax group that applies to this product.
 - Results Sort Order = **number** products in the order you want them to appear. You may also sort them later from the list of Active Products.
 - Main Categories = **check** the box(es) next to the category(ies) the product relates to. Failure to select categories will keep the product from appearing on your store front.
 - Secondary Categories = **check** the box(es) next to the secondary category(ies) the product relates to.
 - Product Options = **check** the box(es) next to the Option Group(s) that apply to this product.
 - Out of Stock Message = this message will appear to the customer ONLY if you choose to have backorders. Backorders allow customers to purchase the product even if you are out of stock or a class is full (i.e. a waiting list).
 - Contact [Stu Schrage](#) if you want to allow backorders.
 - **Customize** the message your customers will see if the stock is at zero.
 - Click on **NEXT** to move to the next section. This will NOT save the product.
- **Descriptions** = use the WYSIWYG to describe the product
 - Preview Description = a short description will give a small bit of information beyond the product name. However, it is optional. Appropriate information includes dates, times, places, and/or a short sentence.
 - Full Description = a larger amount of information regarding the product. It will appear below the product name and above the additional fields.
 - Additional Information = Appears at the bottom of the product page. Appropriate use includes further information, instructions, disclaimers, etc.
 - Additional Search terms = allows customers browsing the web to find your product. Efficiency of this function has not been tested.
 - Click on **NEXT** to move to the next tab. This will NOT save your product.
- **Photos** = **Insert** an image specific to the product (optional). Or just click on **SAVE IMAGE**.
 - Click on the blue arrow to browse your computer for an image to upload.
 - Click on the on **browse**, find your image, and **double click** on the image
 - Click on **Start Upload**
 - Click on **Save Product**
 - Click on the folder to choose an image you have already uploaded to the UMarket Photo database.
 - Click on the **image**
 - Click on **Save Product**
 - Click on the **red lined circle** to **delete** an image. Click on **Save Product**
 - Once your Product is saved 3 more tabs will appear: SKUs, Sub-Products, and Extra Fields
- **SKUs** = (stock keeping units) set the price(s) and quantity of a product.
 - SKU Name is a unique id across the entire shopping cart. Acronyms are most used as number can be hard to keep track of from product to product and sku to sku.
 - On Web = default is **YES**. May be set to **NO** in the future if the pricing changes. You may not delete a sku once there are transactions, but you may remove it from site, by changing it to **NO**.
 - Price = enter the **amount** of the product. Decimal points are not needed for even dollar amounts.
 - Sort = **number** the order if you have multiple skus
 - Weight = only applies if you ship a product based on its weight
 - Ship Cost = only applies if you ship a product for a flat fee.
 - Stock = must have number of available items (or number of spaces in a class) in order to appear on the store front.

- A Zero stock number will remove the product from the store front, unless you have chosen to allow backorders (see back orders pg. 8)
 - If you do not need to set a limited number of items, use 99999 as your stock number. You are unlikely to run out.
- SKU Options = if the product has options, there must be a sku for each option combination, even if the dollar amount is the same.
 - i.e. Product = T-Shirt
 - Product Options = Size (M, Lg, XLg) & Color (black, red)
 - SKUS = 1) Med, black - \$15
 - 2) Med, red - \$15
 - 3) Lg, black - \$15
 - 4) Lg, Red - \$15
 - 5) XLg, black = \$20
 - 6) XLg, red = \$20
- **Sub-Product Tab** = used to put related products on the same product page.
 - **Check** the boxes next to the products you wish to associate with the new product.
 - Click **Add Selected Products**
 - Sub-Product Only products must be added in this manner. They will not appear in a category as an individual product.
- **Extra Fields** = used to collect information regarding the customer purchasing the product.
 - **Check** the boxes next to the fields you want to include on this product
 - Custom Labels and help may be given. There are defaults listed.
 - **Re-number** the order of the fields to appear for this product. It may be different than the original sort # you gave it when setting up the Extra Fields. That doesn't matter, they will appear according to the order you specify in the product.
 - **Require** the customer to answer the field. The customer will not be able to move on, unless the field is answered. An asterisk (*) will appear next to required fields and will be explained on the page. The customer will also see a message to complete a required field if they try to move on without supplying an answer.
 - **Delete Selected Fields** at any time
 - **Save changes**

Create a Hidden Product

You may want to create a product that you provide to specific individuals if they are getting a discounted price or they need to pay an invoice that no one else should see. You can create this hidden product and then send the URL to that product to the individuals who need it. The key is to remove the ability of the users to look at **ALL PRODUCTS**.

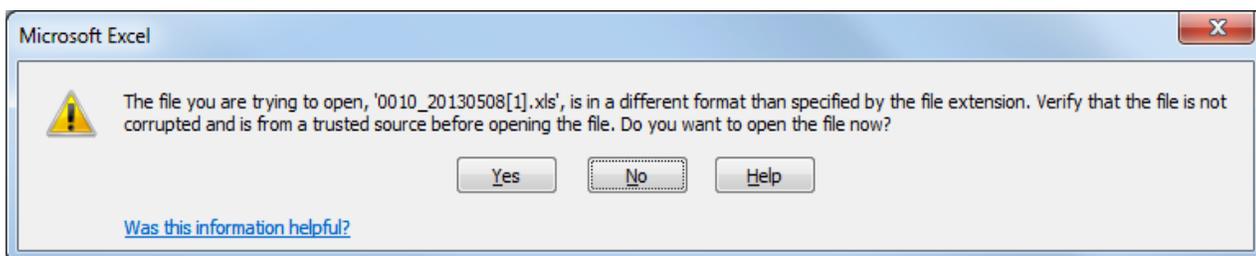
- Create a unique **SECONDARY CATEGORY** that only this product will be linked to.
- Create a product, following the instructions above. Choose your unique secondary category **ONLY**. Do not link it to a main category. Immediately complete the next steps, as this product will be live for a very short time. It is necessary to have the product published in order to get the URL to the secret product.
- View Site, and click on "All Products" in red, on the left to find your product. Click on the product so you see the product page you want to send, and copy the URL in the browser box and save somewhere you can access it easily, or save it to your favorites.
- Quickly, go back to the admin module. Go to Store Settings>Custom Labels.

- Delete the label “All Products” and save.
- You can check to be sure the product is not visible to the user by viewing the store, and clicking on categories or secondary categories. You should not see your hidden product in your store.
- Send the URL to your hidden product, that you saved, in an email to your special customers.

Manage Orders

- Click on **ORDERS** on the left side menu OR on the home page click on **View all Order History**. A list of orders will appear.
- Click on the **View Pencil** to see the order information.
 - **Order Status** will be pending, or paid in full.
 - **Pending** will appear as the order status for 1 of 3 reasons:
 - You allow check payments, and the customer chose the **Pay with Check** option.
 - When you receive the check, change the status to **Paid in Full** for tracking purposes. The customer will also receive an automated email that their payment has been received.
 - Declined credit card transactions MAY appear as a pending status. To be sure, check the **Payment Details tab** for payment method and status and transaction Data. If the status says, review, contact the customer for another form of payment.
 - “Pending” may also appear if there was a loss of communication before the payment was recorded in UMarket.
 - Check the WFG Credit Card Detail in CIS to see if the card was charged. If yes, then you can change the “Pending” status to “Paid in Full”. Once you change the status and save it, a “Payment Confirmation Email” will be automatically sent to the customer.
 - **Paid in Full** should appear for all credit card transactions that were approved. See the previous bullet point – unfortunately, not all approved transactions get recorded to UMarket and can appear as pending.
 - Change the status to **Shipped** if you are shipping the order. This is for tracking purposes, but changing the status will automatically send an email to the customer that their order has been shipped.
 - If an order has been **cancelled** or a refund has been issued, you may change the status of the order for tracking purposes only. Changing the status to cancelled or **returned** does NOT initiate a refund. **See Refunds**
 - **Order Details** will show you what products(s) was purchased, the amount paid, and the answers to the extra fields.
 - **Payment Details** shows the date/time, the amount paid, the payment method, and the transaction ID. It also shows **Transaction Data** such as the billing and shipping address. Scroll through the transaction to see the following:
 - ccAuthReplay_cvCode= response to verification of the 3 digit security code on the back of the card. See Appendix A
 - ccAuthReply_avsCode= response on the billing address matching what the card issuer has on file.
 - Reason Code = Accepted reason codes or Declined reason codes. **See Appendix A**
 - Chartfield and Gift Details = see the chartfield(s) the order will be deposited to.

- **Customers** = look for orders by Customer Name
 - Enter the **name** in the search field at the top of the page OR
 - Click on a **column header** to sort the names in alphabetical order
 - Click on the **View Pencil** or the customer name to see details.
 - **Customer Info** = shows Contact Details, Billing Information and Shipping information
 - **Purchase History**= shows one transaction. Multiple transactions by a single customer will show as single line items/transactions.
- **Export to Excel**
 - Click on **Orders** in the left menu or **View All Order History** from the Admin Home page
 - Click on **Export to Excel** below the list of orders. (you must have more than one order for the button to appear)
 - Click on **Save** or **Open**
 - If you receive the following warning, click **YES**



- **Save As** an Excel Workbook (*.xlsx)
- **Sort** the spreadsheet as needed
- All Extra Fields, Contact information, billing & shipping addresses will be on the spreadsheet

Upload Images

- You may upload images to use on your home page. Please follow the steps below:
 - **Add a new product** called IMAGES or PHOTOS.
 - Do not select any categories or products. Click **Next**.
 - Click **next**, without entering any product descriptions.
 - Click on the **blue arrow** to browse your computer for the image
 - Click on **Start Upload. Save product**.
 - Go back to the Photos Tab and **RIGHT CLICK** on the View Images links to the left of the image.
 - Internet Explorer: **Copy shortcut**
 - Mozilla Firefox: **Copy link location**
 - Chrome: **Copy image address**
 - **Paste** the URL where you can easily retrieve it again, like a Word Document or Notepad.
 - To use the image in your homepage use the WYSIWYG and paste the link into the **image URL**.

Activate the Shopping Cart

- The shopping cart is live when you receive your UMarket account # (aka. App_Type)
- Do a test transaction

- If your products are available as pay by check only, or a \$0 amount, you can run as many transactions as you like. Delete the test transactions when you are finished.
- If you would like a “live” credit card transaction, please contact [Kim Stringham](#) to complete it for you. She will send you a screen shot of the confirmation page, and the applicable order and payment notifications.
- You should also receive the administrative email notification.
- **Request a refund** the following day for the test transaction.
- Contact Kim Stringham if you have any questions.
- Contact your department webmaster to put the shopping cart URL on your website, OR
- You may send the URL to your customers via email or mailers.
- **Remember:** The shopping cart is live, but not available until you put it out there!

Refunds

- Refunds for UMarket transactions must be refunded through Income Accounting and Student Loan Services
- Complete the E-Commerce Refund Request form
 - Include the **REQ ID #** - which is NOT found in the UMarket order.
 - **Log into CIS**
 - Find the Financial & Business Services panel (has a life preserver with FBS in the middle)
 - The second header down is **Transaction Detail Search**
 - Click on **WFG Credit Card Detail**
 - A new window will pop up with your App_Type(s) in the drop down and a date range
 - Select the App_Type and enter the **date of the transaction** to be refunded
 - The **REQ ID** will be listed along with other transaction data
 - **Email** the completed form to Imacgregor@income.utah.edu
 - Refunds are processed within 1-2 business days. You will not receive a confirmation that the refund has been processed. Please check the WFG Credit Card Detail to confirm the refund within 1-2 business days.
 - Refunds take 3-5 business days to post to a cardholder’s account. Some banks take a bit longer. The customer may need to call the bank to confirm the refund if they do not see it online after 5 business days.
 - Verify when the refund was issued by looking on the **WFG Credit Card Detail**. The transaction will say **“ics_credit”** to the left of the amount.
- Check payments must be refunded by check. You may put in a **check request** through [Accounts Payable](#).
- **REMINDER:** if a UMarket customer asks for a refund on a different card than was used in the original transaction, please explain that we can only refund to the original card. It is a popular fraud tactic to ask for refunds on different cards. You may always contact Kim Stringham or Lorrie MacGregor to discuss the situation.
 - Stu Schrager, 801-581-5764, stuart.schrager@income.utah.edu
 - Lorrie MacGregor, 801-581-3132, Imacgregor@income.utah.edu

APPENDIX A

This page describes the Address Verification (AVS) and Card Verification (CVN) codes.

AVS Codes

Code	Summary	Description
A	Partial match	Street address matches, but 5-digit postal code and 9-digit postal code do not match.
B	Partial match	Street address matches, but postal code not verified. Returned only for non-U.S.-issued Visa cards.
C	No match	Street address and postal code do not match. Returned only for non-U.S.-issued Visa cards.
D & M	Match	Street address and postal code match. Returned only for non-U.S.-issued Visa cards.
E	Invalid	AVS data is invalid, or AVS is not allowed for this card type.
F	Partial match	Card member's name does not match, but billing postal code matches. Returned only for the American Express card type.
G	Not supported	Non-U.S. issuing bank does not support AVS.
H	Partial match	Card member's name does not match, but street address and postal code match. Returned only for American Express cards.
I	No match	Address not verified. Returned only for non-U.S.-issued Visa cards.
J	Match	Card member's name, billing address, and postal code match. Shipping information verified and chargeback protection guaranteed by the Fraud Protection Program. Returned only for AAV+ with the American Express Phoenix processor.
K	Partial match	Card member's name matches, but billing address and billing postal code do not match. Returned only for the following processors and card types: <ul style="list-style-type: none"> Enhanced AVS or AAV+ with the American Express Phoenix processor Chase Paymentech for American Express cards TSYS Acquiring Solutions for American Express cards
L	Partial match	Card member's name and billing postal code match, but billing address does not match. Returned only for the following processors and card types: <ul style="list-style-type: none"> Enhanced AVS or AAV+ with the American Express Phoenix processor

		<ul style="list-style-type: none"> • Chase Paymentech for American Express cards • TSYS Acquiring Solutions for American Express cards
M	Match	See the entry for D & M.
N	No match	Street address and postal code do not match. <i>or</i> Card member's name, street address and postal code do not match. Returned only for the American Express card.
O	Partial match	Card member's name and billing address match, but billing postal code does not match. Returned only for the following processors and card types: <ul style="list-style-type: none"> • Enhanced AVS or AAV+ with the American Express Phoenix processor • Chase Paymentech for American Express cards • TSYS Acquiring Solutions for American Express cards
P	Partial match	Postal code matches, but street address not verified. Returned only for non-U.S.-issued Visa cards.
Q	Match	Card member's name, billing address, and postal code match. Shipping information verified but chargeback protection not guaranteed (Standard program). Returned only for AAV+ with the American Express Phoenix processor.
R	System unavailable	System unavailable.
S	Not supported	U.S.-issuing bank does not support AVS.
T	Partial match	Card member's name does not match, but street address matches. Returned only for American Express cards.
U	System unavailable	Address information unavailable. Returned if non-U.S. AVS is not available or if the AVS in a U.S. bank is not functioning properly.
V	Match	Card member's name, billing address, and billing postal code match. Returned only for the following processors and card types: <ul style="list-style-type: none"> • Enhanced AVS or AAV+ with the American Express Phoenix processor • Chase Paymentech for American Express cards • TSYS Acquiring Solutions for American Express cards
W	Partial match	Street address does not match, but 9-digit postal code matches.

X	Match	Street address and 9-digit postal code match.
Y	Match	Street address and 5-digit postal code match.
Z	Partial Match	Street address does not match, but 5-digit postal code matches.
1	Not supported	CyberSource AVS code. AVS is not supported for this processor or card type.
2	Invalid	CyberSource AVS code. The processor returned an unrecognized AVS response.
3	Confirmed	CyberSource AVS code. The address is confirmed. Returned only for PayPal Express Checkout.
4	Not confirmed	CyberSource AVS code. The address is not confirmed. Returned only for PayPal Express Checkout.

CVN Codes

Code	Description
D	Transaction deemed suspicious by issuing bank.
I	Card verification number failed processor's data validation check.
M	Card verification number matched.
N	Card verification number not matched.
P	Card verification number not processed for unspecified reason.
S	Card verification number on the card but not included in the request.
U	Card verification not supported by issuing bank.
X	Card verification not supported by card association.
1	Card verification not supported by processor or card type.
2	Unrecognized value returned by processor.
3	No result returned by processor.

REASON CODE	DESCRIPTION
100	Successful transaction
101	The request is missing one or more required fields.
102	One or more fields in the request contain invalid data. Possible action: See the reply fields invalidField_0...N for which fields are invalid. Resend the request with the correct information.

104	<p>The merchantReferenceCode sent with this authorization request matches the merchantReferenceCode of another authorization request that you sent in the last 15 minutes.</p> <p>Possible action: Resend the request with a unique merchantReferenceCode value.</p>
110	<p>Only partial amount was approved.</p>
150	<p>Error: General system failure.</p> <p>See the documentation for your CyberSource client (SDK) for information about how to handle retries in the case of system errors.</p>
151	<p>Error: The request was received but there was a server timeout. This error does not include timeouts between the client and the server.</p> <p>Possible action: To avoid duplicating the transaction, do not resend the request until you have reviewed the transaction status in the Enterprise Business Center. See the documentation for your CyberSource client (SDK) for information about how to handle retries in the case of system errors.</p>
152	<p>Error: The request was received, but a service did not finish running in time.</p> <p>Possible action: To avoid duplicating the transaction, do not resend the request until you have reviewed the transaction status in the Enterprise Business Center. See the documentation for your CyberSource client (SDK) for information about how to handle retries in the case of system errors.</p>
200	<p>The authorization request was approved by the issuing bank but declined by CyberSource because it did not pass the Address Verification Service (AVS) check.</p> <p>Possible action: You can capture the authorization, but consider reviewing the order for the possibility of fraud.</p>
201	<p>The issuing bank has questions about the request. You do not receive an authorization code programmatically, but you might receive one verbally by calling the processor.</p> <p>Possible action: Call your processor to possibly receive a verbal authorization. For contact phone numbers, refer to your merchant bank information.</p>
202	<p>Expired card. You might also receive this if the expiration date you provided does not match the date the issuing bank has on file.</p> <p>Note: The ccCreditService does not check the expiration date; instead, it passes the request to the payment processor. If the payment processor allows issuance of credits to expired cards, CyberSource does not limit this functionality.</p> <p>Possible action: Request a different card or other form of payment.</p>
203	<p>General decline of the card. No other information provided by the issuing bank.</p> <p>Possible action: Request a different card or other form of payment.</p>
204	<p>Insufficient funds in the account.</p> <p>Possible action: Request a different card or other form of payment.</p>
205	<p>Stolen or lost card.</p> <p>Possible action: Refer the transaction to your customer support center for manual review.</p>
207	<p>Issuing bank unavailable.</p> <p>Possible action: Wait a few minutes and resend the request.</p>
208	<p>Inactive card or card not authorized for card-not-present transactions.</p> <p>Possible action: Request a different card or other form of payment.</p>

209	American Express Card Identification Digits (CID) did not match. Possible action: Request a different card or other form of payment.
210	The card has reached the credit limit. Possible action: Request a different card or other form of payment.
211	Invalid card verification number. Possible action: Request a different card or other form of payment.
221	The customer matched an entry on the processors negative file. Possible action: Review the order and contact the payment processor.
230	The authorization request was approved by the issuing bank but declined by CyberSource because it did not pass the card verification (CV) check. Possible action: You can capture the authorization, but consider reviewing the order for the possibility of fraud.
231	Invalid account number. Possible action: Request a different card or other form of payment.
232	The card type is not accepted by the payment processor. Possible action: Contact your merchant bank to confirm that your account is set up to receive the card in question.
233	General decline by the processor. Possible action: Request a different card or other form of payment.
234	There is a problem with your CyberSource merchant configuration. Possible action: Do not resend the request. Contact Customer Support to correct the configuration problem.
235	The requested amount exceeds the originally authorized amount. Occurs, for example, if you try to capture an amount larger than the original authorization amount. Possible action: Issue a new authorization and capture request for the new amount.
236	Processor failure. Possible action: Wait a few minutes and resend the request.
237	The authorization has already been reversed. Possible action: No action required.
238	The authorization has already been captured. Possible action: No action required.
239	The requested transaction amount must match the previous transaction amount. Possible action: Correct the amount and resend the request.
240	The card type sent is invalid or does not correlate with the credit card number. Possible action: Confirm that the card type correlates with the credit card number specified in the request, then resend the request.

241	<p>The referenced request id is invalid for all follow-on transactions.</p> <p>Possible action: No action required.</p>
242	<p>The request ID is invalid.</p> <p>You requested a capture, but there is no corresponding, unused authorization record. Occurs if there was not a previously successful authorization request or if the previously successful authorization has already been used by another capture request.</p> <p>Possible action: Request a new authorization, and if successful, proceed with the capture.</p>
243	<p>The transaction has already been settled or reversed.</p>
246	<p>The capture or credit is not voidable because the capture or credit information has already been submitted to your processor. Or, you requested a void for a type of transaction that cannot be voided.</p> <p>Possible action: No action required.</p>
247	<p>You requested a credit for a capture that was previously voided.</p> <p>Possible action: No action required.</p>
250	<p>Error: The request was received, but there was a timeout at the payment processor.</p> <p>Possible action: To avoid duplicating the transaction, do not resend the request until you have reviewed the transaction status in the Enterprise Business Center.</p>
520	<p>The authorization request was approved by the issuing bank but declined by CyberSource based on your Smart Authorization settings.</p> <p>Possible action: Do not capture the authorization without further review. Review the ccAuthReply_avsCode, ccAuthReply_cvCode, and ccAuthReply_authFactorCode fields to determine why CyberSource rejected the request.</p>

APPENDIX B:

UMarket Contact Information

Kim Stringham

Income Accounting and Student Loan Services
201 S 1460 E, RM 175
Salt Lake City, UT 84112
P. 801-585-5686
F. 801-585-3898
kim.stringham@utah.edu

Contact Kim for UMarket problems, new accounts, chartfield changes/additions, and other credit card processing needs.

Lisa Zaelit

Associate Director
Income Accounting and Student Loan Services
201 S 1460 E, RM 155
Salt Lake City, UT 84112
P. 801-581-3968
F. 801-581-4277
lisa.zaelit@admin.utah.edu

Lorrie MacGregor (refund requests only)

Income Accounting and Student Loan Services
201 S 1460 E, RM 175
Salt Lake City, UT 84112
P. 801-581-3132
F. 801-585-3898
lmacgregor@income.utah.edu

Tax Services

201 S Presidents Cir, RM 411
Salt Lake City, UT 84112
P. 801-581-3428
F. 801-587-9855