

Student Financials – uPay Portal User Guide

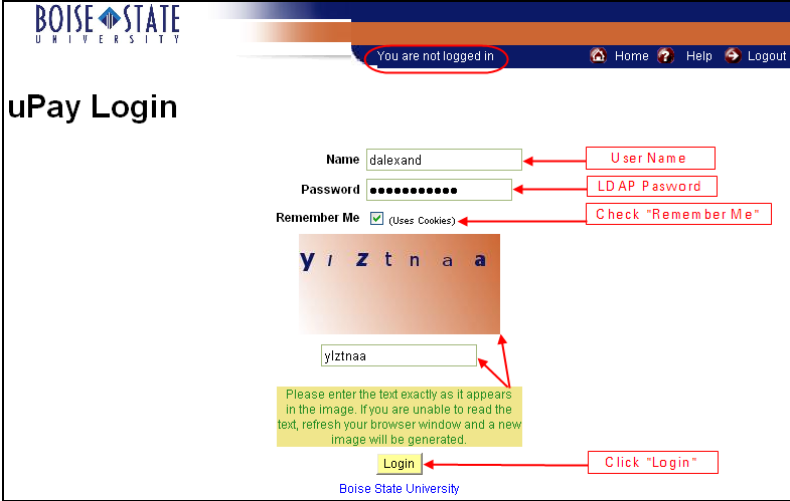
Overview:

The Student Financials department at Boise State University has begun using Touchnet for electronic payments. The uPay Portal was designed by Kevin Sarsen. The portal is simply the place where end users can input the purchase information and credit card information for processing. It does not feed into PeopleSoft.

Please Note: This document will only cover how to log in and process payments using the uPay Portal. Please refer to the Marketplace user guide for information on tracking payments & processing refunds.

Procedure:

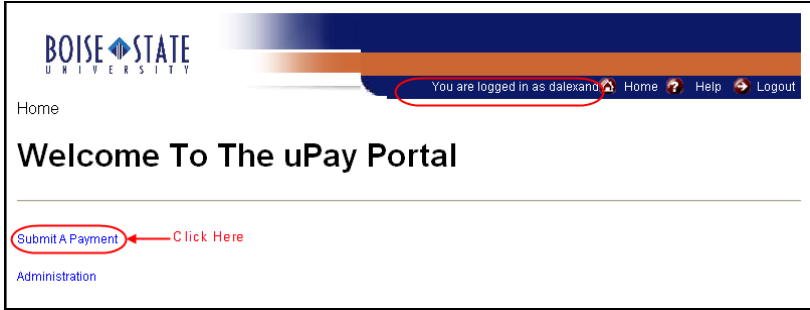
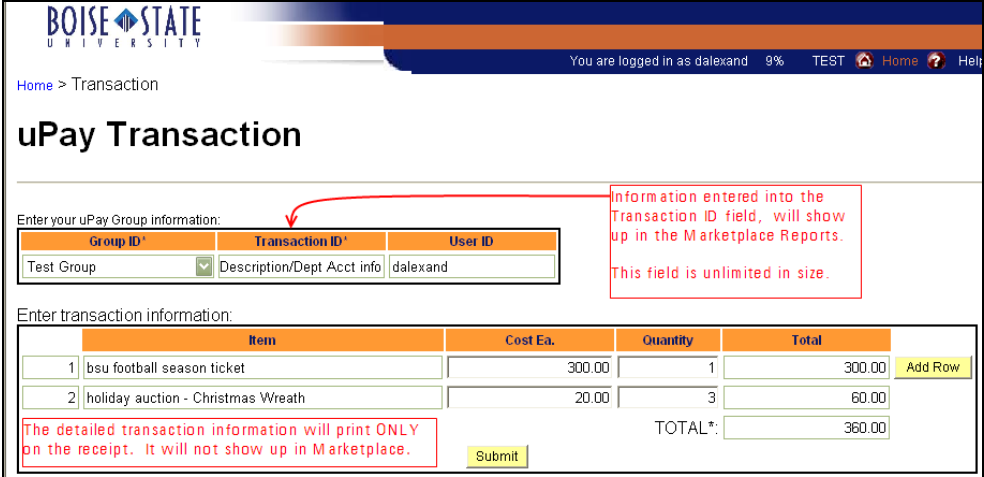
Follow the procedure below to process departmental credit card payments.

Step	Action
1	Log into the uPay portal found at: https://tcprd.boisestate.edu:8443/uPayPortal/uPayLogin.jsp
2	Complete the following... <ul style="list-style-type: none">Name: BroncoWeb User Name.Password: Use your LDAP password (same password used for BroncoWeb).Remember Me: Check this.Authentication: Enter text as it appears in the image above it.Login: Click button to login to uPay Portal. 

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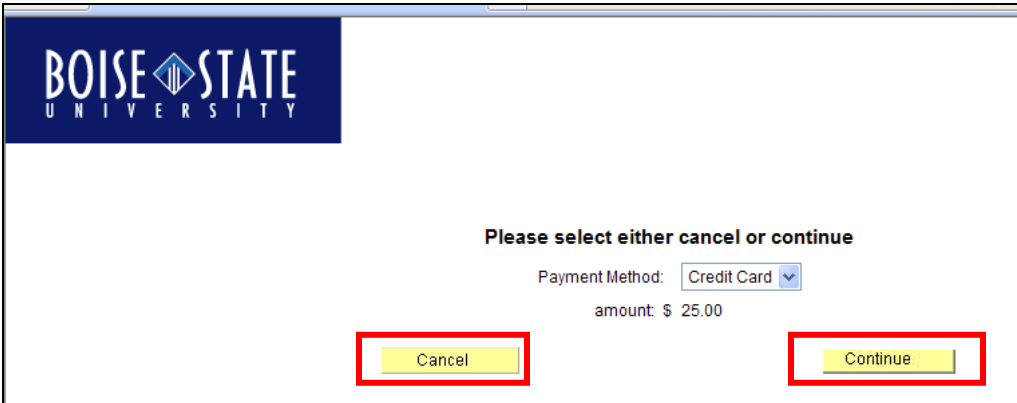
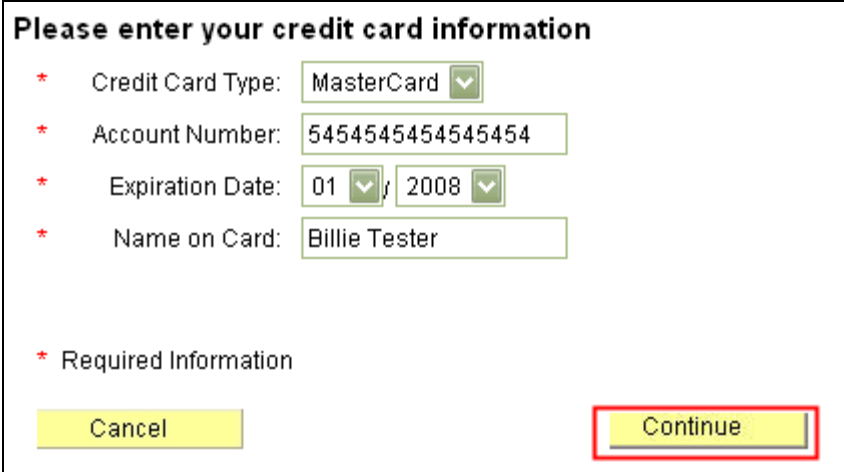
**Procedure
(Continued)**

Step	Action																
3	<p>Click on Submit a Payment.</p> 																
4	<p>Enter uPay Transaction Information.</p> <p><u>Please Note:</u> You must Tab through this screen for the auto calculate to work.</p> <table border="1" data-bbox="459 821 1503 1194"> <thead> <tr> <th>Field</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td>Group ID</td> <td>uPay site name for transaction.</td> </tr> <tr> <td>Transaction ID</td> <td>Information your dept. needs to identify transaction. No special Characters allowed</td> </tr> <tr> <td>User ID</td> <td>Auto fills with your user ID.</td> </tr> <tr> <td>Item</td> <td>What is being purchased</td> </tr> <tr> <td>Cost Ea</td> <td>Individual cost of item(s) purchased.</td> </tr> <tr> <td>Quantity</td> <td>Number of Item(s) purchased.</td> </tr> <tr> <td>Add Row</td> <td>If purchasing different types of items.</td> </tr> </tbody> </table> 	Field	Notes	Group ID	uPay site name for transaction.	Transaction ID	Information your dept. needs to identify transaction. No special Characters allowed	User ID	Auto fills with your user ID.	Item	What is being purchased	Cost Ea	Individual cost of item(s) purchased.	Quantity	Number of Item(s) purchased.	Add Row	If purchasing different types of items.
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5	Click the Submit button.																

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Procedure (Continued)

Step	Action
6	<p>Select either Cancel or Continue.</p>  <p>BOISE STATE UNIVERSITY</p> <p>Please select either cancel or continue</p> <p>Payment Method: Credit Card</p> <p>amount: \$ 25.00</p> <p>Cancel Continue</p>
7	<p>Enter Credit Card Information, then click on Continue.</p> <p><i>Please Note:</i> BSU Accepts Visa, MasterCard, and Discover Credit Cards.</p>  <p>Please enter your credit card information</p> <p>* Credit Card Type: MasterCard</p> <p>* Account Number: 5454545454545454</p> <p>* Expiration Date: 01 / 2008</p> <p>* Name on Card: Billie Tester</p> <p>* Required Information</p> <p>Cancel Continue</p>

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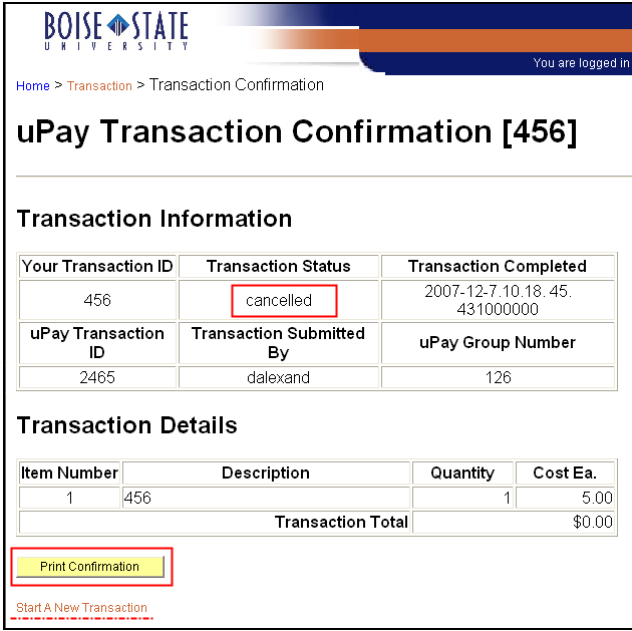
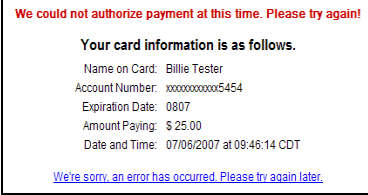
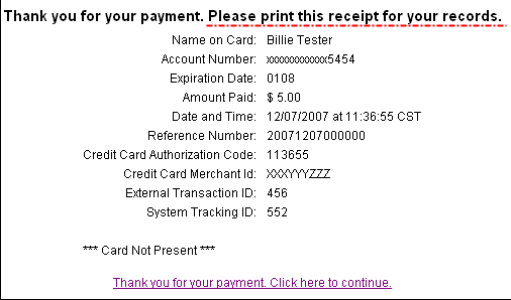
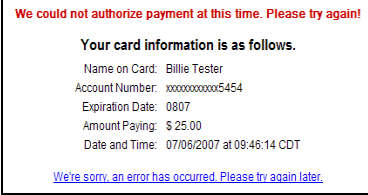
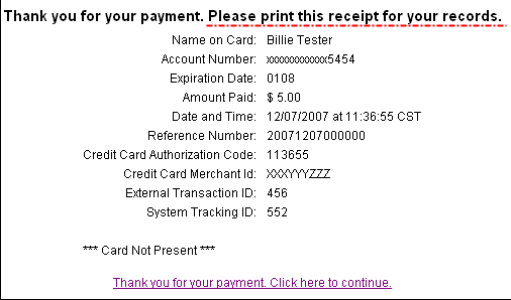
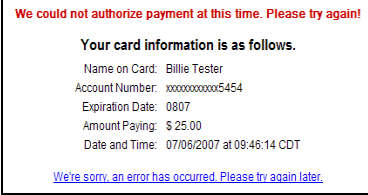
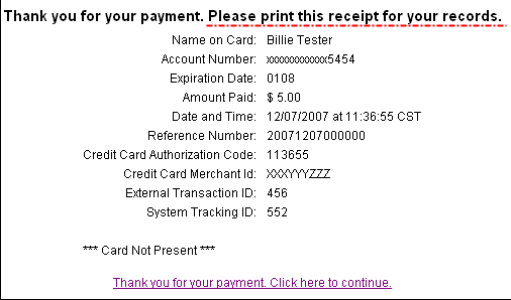
**Procedure
(Continued)**

<u>Step</u>	<u>Action</u>
8	<p>If Credit Card number is invalid or expired you will receive the following message:</p> <div data-bbox="613 327 1357 814" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p style="color: red; text-align: center;">Credit card number or expiration date is not valid. Please check your information and try again.</p> <p>Please enter your credit card information</p> <p>* Credit Card Type: <input type="text" value="MasterCard"/></p> <p>* Account Number: <input type="text" value="5454545454545454"/></p> <p>* Expiration Date: <input type="text" value="01"/> / <input type="text" value="2008"/></p> <p>* Name on Card: <input type="text" value="Billie Tester"/></p> <p>* Required Information</p> <p style="text-align: center;"> <input type="button" value="Cancel"/> <input type="button" value="Continue"/> </p> </div> <p>Correct the information and Click on Continue.</p>
9	<p>Verify Payment Information.</p> <p>Click Cancel (and go to step 10) or Click Continue (and go to Step 11).</p> <div data-bbox="581 1075 1390 1482" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p>Please verify your payment information</p> <p>Name on Card: Billie Tester</p> <p>Account Number: xxxxxxxxxxxx5454</p> <p>Expiration Date: 0108</p> <p style="text-align: center;"> Change Payment Information → <div data-bbox="1110 1201 1360 1335" style="border: 1px solid red; padding: 2px; display: inline-block; color: red; font-size: small;"> Change payment information, without canceling entire transaction </div> </p> <p>Amount Paying: \$ 5.00</p> <p>Date and Time: 12/07/2007 at 11:12:31 CST</p> <p style="text-align: center;"> <input type="button" value="Cancel"/> <input type="button" value="Continue"/> </p> </div>

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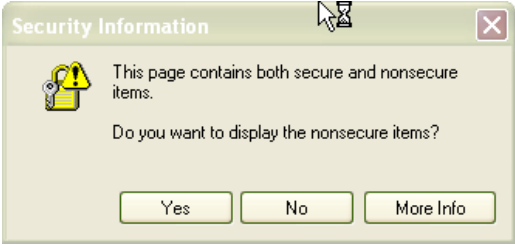

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Procedure
(Continued)

Step	Action						
10	<p>Cancel a transaction. Once you click on Cancel, it will produce a confirmation page. Print this page for yourself and/or your customer.</p>  <p>The screenshot shows the 'uPay Transaction Confirmation [456]' page. It includes a 'Transaction Information' table with columns for Transaction ID, Status (cancelled), and Completion Date. Below that is a 'Transaction Details' table with columns for Item Number, Description, Quantity, and Cost. A 'Print Confirmation' button is highlighted with a red box.</p>						
11	<p>Continue with transaction. Once you click on continue you should receive either an Error or Success Message.</p> <table border="1" data-bbox="456 1136 1503 1856"> <thead> <tr> <th data-bbox="456 1136 995 1178"><u>If you receive...</u></th> <th data-bbox="995 1136 1503 1178"><u>Then...</u></th> </tr> </thead> <tbody> <tr> <td data-bbox="456 1178 995 1478"> <p>An Error Message</p>  <p>The error message screenshot shows: 'We could not authorize payment at this time. Please try again!' followed by 'Your card information is as follows.' and details: Name on Card: Billie Tester, Account Number: xxxxxxxxxxxx5454, Expiration Date: 0807, Amount Paying: \$ 25.00, Date and Time: 07/06/2007 at 09:46:14 CDT. A link at the bottom says 'We're sorry, an error has occurred. Please try again later.'</p> </td> <td data-bbox="995 1178 1503 1478"> <p>Then contact Deanne Alexander in Student Financial Services to see if the server is down. 426-2988 or dalexand@boisestate.edu</p> <p>Note: This error also appears if you use special characters in the Trans ID</p> </td> </tr> <tr> <td data-bbox="456 1478 995 1856"> <p>A Success Message</p>  <p>The success message screenshot shows: 'Thank you for your payment. Please print this receipt for your records.' followed by details: Name on Card: Billie Tester, Account Number: xxxxxxxxxxxx5454, Expiration Date: 0108, Amount Paid: \$ 5.00, Date and Time: 12/07/2007 at 11:36:55 CST, Reference Number: 20071207000000, Credit Card Authorization Code: 113855, Credit Card Merchant Id: XXXYYYZZZ, External Transaction ID: 456, System Tracking ID: 552. It also says '*** Card Not Present ***' and has a link 'Thank you for your payment. Click here to continue.'</p> </td> <td data-bbox="995 1478 1503 1856"> <p>Use the print button on your browser window to print this receipt for your customer.</p> <p>Click the link at bottom of the page to continue.</p> </td> </tr> </tbody> </table>	<u>If you receive...</u>	<u>Then...</u>	<p>An Error Message</p>  <p>The error message screenshot shows: 'We could not authorize payment at this time. Please try again!' followed by 'Your card information is as follows.' and details: Name on Card: Billie Tester, Account Number: xxxxxxxxxxxx5454, Expiration Date: 0807, Amount Paying: \$ 25.00, Date and Time: 07/06/2007 at 09:46:14 CDT. A link at the bottom says 'We're sorry, an error has occurred. Please try again later.'</p>	<p>Then contact Deanne Alexander in Student Financial Services to see if the server is down. 426-2988 or dalexand@boisestate.edu</p> <p>Note: This error also appears if you use special characters in the Trans ID</p>	<p>A Success Message</p>  <p>The success message screenshot shows: 'Thank you for your payment. Please print this receipt for your records.' followed by details: Name on Card: Billie Tester, Account Number: xxxxxxxxxxxx5454, Expiration Date: 0108, Amount Paid: \$ 5.00, Date and Time: 12/07/2007 at 11:36:55 CST, Reference Number: 20071207000000, Credit Card Authorization Code: 113855, Credit Card Merchant Id: XXXYYYZZZ, External Transaction ID: 456, System Tracking ID: 552. It also says '*** Card Not Present ***' and has a link 'Thank you for your payment. Click here to continue.'</p>	<p>Use the print button on your browser window to print this receipt for your customer.</p> <p>Click the link at bottom of the page to continue.</p>
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**Procedure
(Continued)**

Step	Action
12	<p>If you get this message on the screen, click on the Yes button.</p> 
13	<p>Successful Transaction Confirmation.</p> <p>Print this page by using the  button at the bottom of this page.</p> <p>Please note: This is the only time you have access to all the detail information. We recommend that departments print a copy of the confirmation for reconciling purposes. Also, if customer needs a more detailed receipt, you can print this page for them.</p> 