CAMPUSCALL

Online Giving Training Guide

RuffaloCODY® Product Documentation

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About Online Giving Integration (OGI)

Within CAMPUSCALL 3.2, 3.3, and 3.4, the Giving Profiles application allows your site to setup immediate processing for credit cards through a selected vendor website. The main benefit to using OGI is for PCI security compliance; Credit card numbers will no longer be stored on the CAMPUSCALL server. Once the OGI has been setup and assigned to a project, the vendor's website will be available in the pledge routine allowing callers to process credit cards immediately.

Existing Online Giving Profile

To access the Online Giving Integration (OGI) application, select Giving Profiles from the Main Menu on the left of your screen. The OGI Profile Search window is opened.

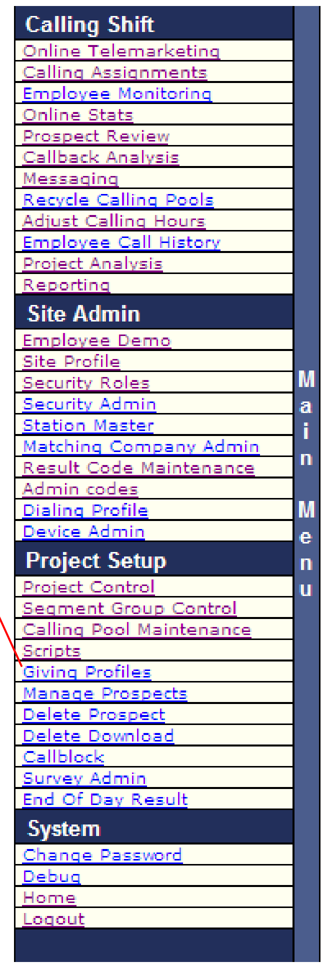
ogi profile search

profile name

Search

11 records returned

Profile Name	Vendor Name
MIT CyberSource	CyberSource
RuffaloCODY SallieMae	SallieMae
Authorize.Net TEMPLATE	Authorize.Net
CyberSource TEMPLATE	CyberSource
Moneris TEMPLATE	Moneris
Paypal TEMPLATE	Paypal
QuikPay TEMPLATE	QuikPay
Sage Vault TEMPLATE	Sage Vault
SallieMae TEMPLATE	SallieMae
TouchNet TEMPLATE	TouchNet
World Pay TEMPLATE	World Pay



All available profiles for your site appear on the OGI Profile page. Profiles listed with a "Template" in the title are profiles that cannot be edited or deleted. This list represents the online giving vendors that CAMPUSCALL supports and they are available to give you the flexibility in changing your online giving vendor.

To edit your custom profile, click the row that contains your profile. This takes you to the OGI Profile Detail page where you can make any necessary changes. If an OGI Profile has already been created for your site, you do not have to change any setting within this screen.

Activating Online Giving In Your Project

1. Go to Main Menu and select Project Control.
2. Click the Search button to show all Projects.
3. Select the Project you want to add OGI to.
   a. Click on the General Giving tab (if it isn't already selected).
4. Select your Giving Profile in the Profile drop-down box.
5. Click Save.

Creating a New Giving Profile

To create a new Giving Profile click the copy button next to the desired template.

The OGI Profile Detail page has two tabs: General and Mappings. The General tab lists all of the essential connection information needed to connect CAMPUSCALL to your OGI vendor. The Mappings tab allows you to view and customize the way the information is passed from CAMPUSCALL to the vendor.

General Tab

Profile Name - This is the name of your profile. If you are editing a custom profile, you can change it.

Delimiter - This is used to define separate pieces of information within the same field. If you are sending two values in one field, your delimiter would be used to separate the two values. Normally this will be a space.

Vendor - The name of the vendor you selected. It cannot be modified once you copy the default profile for that vendor.

URL - This is the URL of the vendor. Your vendor should supply you with the URL CAMPUSCALL needs to connect to their online credit card processing website.

The following is a list of known vendor URLs.

- Authorize.Net (Test): https://test.authorize.net/gateway/transact.dll
  Authorize.Net (Production): https://secure.authorize.net/gateway/transact.dll
- CyberSource (Test): https://orderpagetest.ic3.com/hop/orderform.jsp
  CyberSource (Production): https://orderpagetest.ic3.com/hop/orderform.jsp
- Sage Vault (Test & Production): https://www.sagepayments.net/eftcart/forms/vault.asp
- PayPal (Test & Production): https://payflowlink.paypal.com

Additional Required Fields

Authorize.Net
Key - This is used for the secure encryption to authenticate the transaction.
Login - This specifies which account to process the transactions against.

CyberSource
Public Key - This is used for the secure encryption.
Merchant Login ID - This specifies which merchant account to process the transactions against.
Serial Number - CyberSource checks this serial number against its list of valid serial numbers to determine if this is a valid transaction. To get this number you must generate the HOP.JSP file from your main CyberSource account. This number can be different from testing to live production. Contact CAMPUSCALL Support for information on generating the required HOP.JSP file from your CyberSource Business Center Account.

Moneris
Hosted Paypage Key – This is sent as part of the transaction request to securely identify your store and the specific configuration.
Store ID - This is the identifier for the unique configuration.

PayPal (Pay Flow Link Only)
Partner - Your PayPal Reseller provided the name of your Partner to you.
Merchant Login - The LOGIN ID to your account.

QuikPay
Shared Secret - Used in the creation of the secure encryption to authenticate the incoming transaction.

Sage Vault
Virtual Terminal ID – This is the identifier for the unique configuration.

WorldPay
Key - This is used for secure encryption.
Login -This specifies which account to process the transactions against.
Authentication Method -

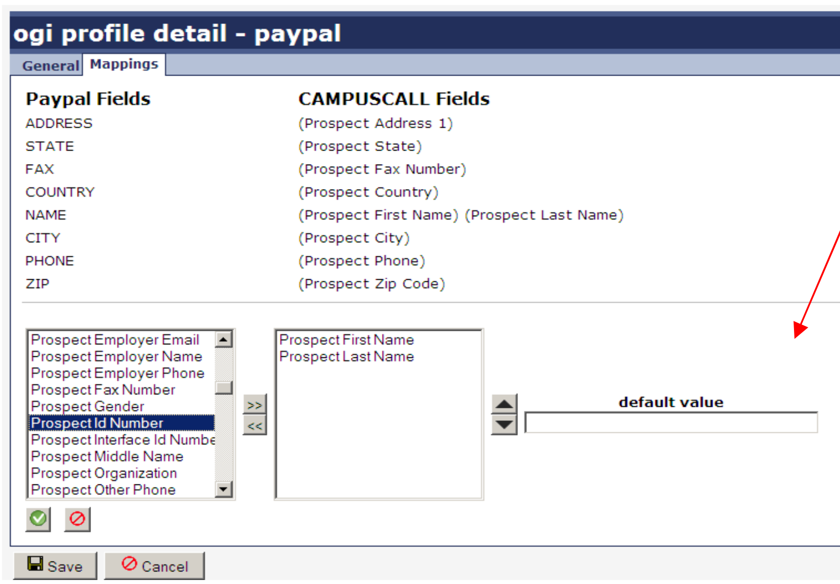
OGP
This option can be setup to direct payment through the school's website. The caller is responsible for entering all prospect information into the website.

Mappings Tab
This tab defines the way data is submitted to the vendor. Any of the fields can be edited.

Select the vendor field that needs to be changed and a list displays below with all possible CAMPUSCALL fields you can use to populate the vendor field. Double click the CAMPUSCALL field you want on the left, and it will move into the box on the right. If you need to remove a CAMPUSCALL field from the vendor field box, double click to remove it.

If you want to map two or more CAMPUSCALL fields into the vendor field (as in the Name field seen below), double click each field. To change the order they will appear click the up and down button to the right.

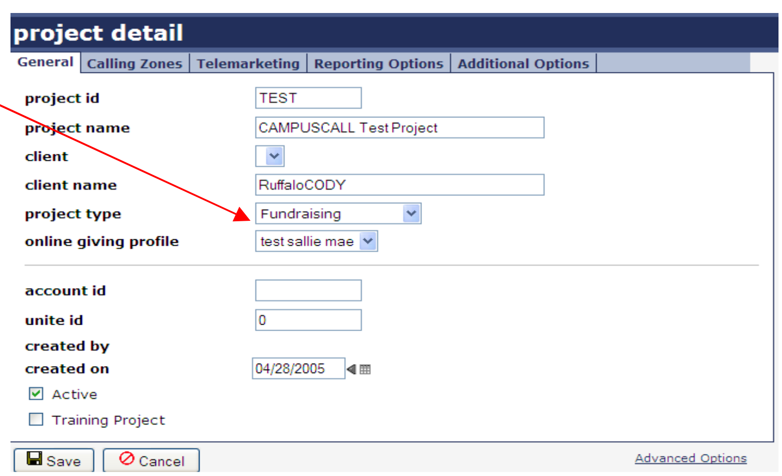
NOTE: The delimiter field you selected on the OGI Profile page will be used here to separate the multiple CAMPUSCALL fields you have listed for this vendor field.



The Default Value box is used if the CAMPUSCALL field you have mapped to the vendor field is blank. You can set a default value to be mapped in case this happens. One example would be if the email field is blank, you could set the default to be [example@anywhere.com.](mailto:example@anywhere.com)

Testing Online Giving in CAMPUSCALL

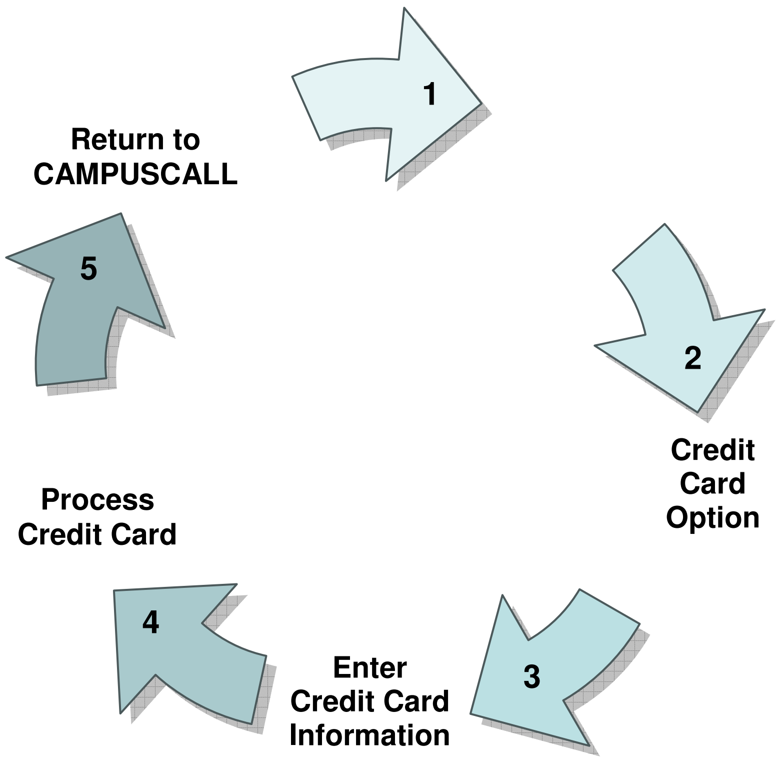
Once a project has been setup to use an Online Giving Profile within the Project Detail screen, verify that the launch button is active within the Telemarketing Pledge Screen.



You may choose to setup a test OGI account in order to review the entire online giving process, including review of credit card information that your data processing department will use to verify that pledge information was recorded and processed correctly.

Basic Workflow

The process for Single and Recurring Payments follows the basic workflow shown below. The specific steps from the Caller and Manager/Supervisor perspective are listed in the subsequent sections. For OGI to work properly, caller work stations MUST be able to access the vendor's URL.



1. Enter the Telemarketing Pledge Screen.
2. Select the credit card payment option which launches the vendor's website.
3. Enter the necessary credit card information into the vendor's website.
4. A vendor confirmation page will display the transactions status.
5. Leave the vendor's website and mark the transaction as a success or failure.

Account Nicknames

Credit Card Type	Account Nickname
Visa	VI
MasterCard	MA
American Express	AMEX
Discover	DI
Diners Club	DC
JCB	JCB
Carte Blanche	CB

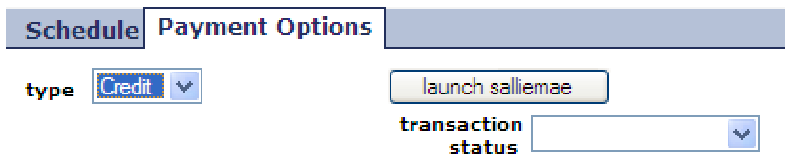
Single Payment - Detailed Steps

The caller gathers the pledge details within CAMPUSCALL, enters Credit Card details in the vendor's website, submits the payment for processing (which is subsequently processed), and returns to CAMPUSCALL to complete the pledge.

Entering Credit Card Information

The following information must be captured BEFORE accessing the vendor's website:

- Pledge Amount
- Frequency
- Designation Information



Once complete, the credit card payment type is enabled. Select credit card from the list of payment type options. Click 'Launch Sallie Mae" (if your are not using Sallie Mae the name of your vendor will appear here). This will open the vendor's website.

1. Verify that the pre-populated information in CAMPUSCALL is correct. If the information is incorrect or simply doesn't seem as expected, follow one of the procedures outlined below.

2. Enter the Credit Card details (Number, Expiration, etc.). Enter the Account Nickname as well. Use the Credit Card Type table listed in Account Nicknames.

3. Click the pay now button. After a few moments you should see a receipt page. Continue if the transaction receipt shows a status of "Approved" or "Pending". Otherwise, follow one of the procedures outlined below.

4. Close the receipt page, mark the transaction status and continue with your usual pledge process.

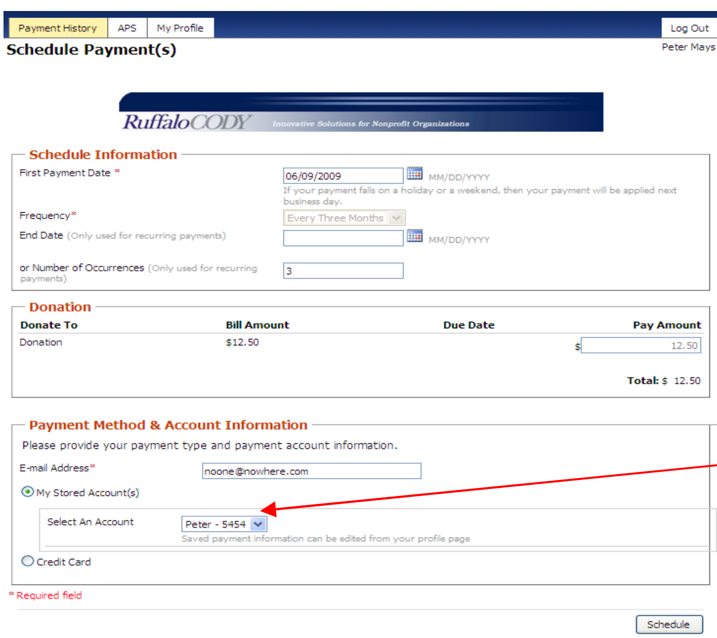
Issue, error, or otherwise…	What the Caller can do…
Website is unavailable	1. Follow the "write down" procedure. 2. Mark the credit card transaction as a failure.
Data pre-population is incorrect	1. Retry connection to the vendor's website: a. Verify the Pledge Amount, Designation(s), and Frequency are correct. b. Click the launch button which will re-open the vendor's website. c. Verify the data is correct. If not use option 2. 2. Change the payment type to check.
Credit card transaction is declined	1. Attempt the same transaction again. 2. Ask for another credit card to try. 3. Mark the transaction as a failure or change the payment type to check.

Recurring Payment - Detailed Steps (for Sallie Mae Only)

This process is intended for the Manager/Supervisor. Use the Project ID drop-down menu to locate your current project and select the date range for which you want to locate credit cards. Click Search. Below you will see a list of all pledges matching your search criteria.

The caller has already processed the first payment but you must schedule all additional payments. The "First recurring payment date" will therefore show the date of the second payment and the "# of payments" column has the total number of payments minus one. For example, if the pledge had 12 monthly payments starting on 1/22/2009, the caller has already processed the first payment dated 1/22/2009 and you need to schedule 11 payments starting on 2/23/2009.

To process a payment, click on that pledge's row in the table and the Sallie Mae processing screen will appear.



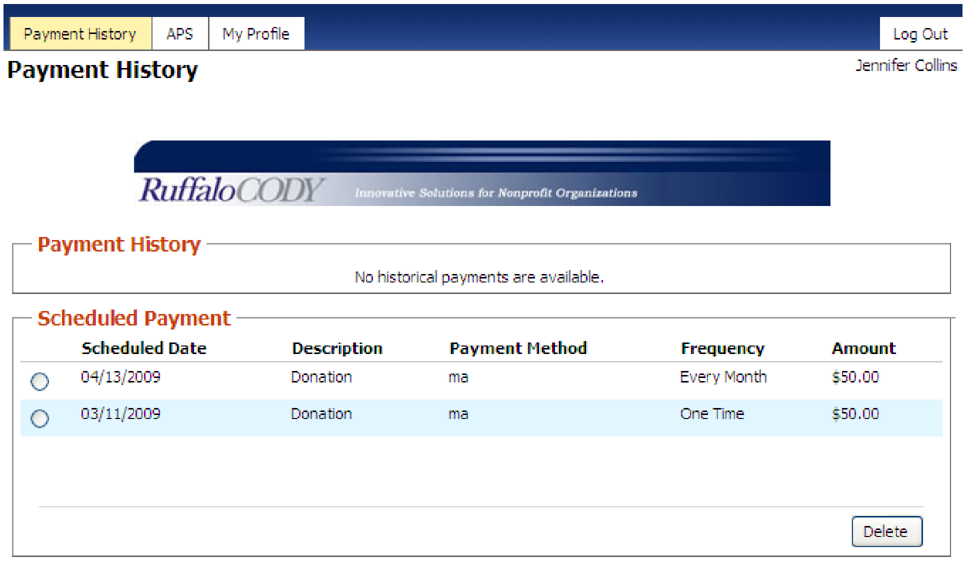
If the caller submitted the "nickname" for the account when they entered the credit card information, the "My Stored Account(s)" radio button is selected and the credit card account is displayed in the "Select an Account" drop-down box.

In this case, simply click the "Schedule" button to setup all remaining payments.

If the caller did not enter a "nickname" for the credit card, you will need to recapture the credit card information, click the "Credit Card" radio button and fill out all the credit card information. It is a good idea to train callers to capture this nickname on all credit cards.

Recurring Payment - Detailed Steps (for Sallie Mae Only) continued

It is a good idea to make sure no one else has already scheduled the payment you are about to schedule. To do that, click on the "Payment History" tab at the top left side of the screen.

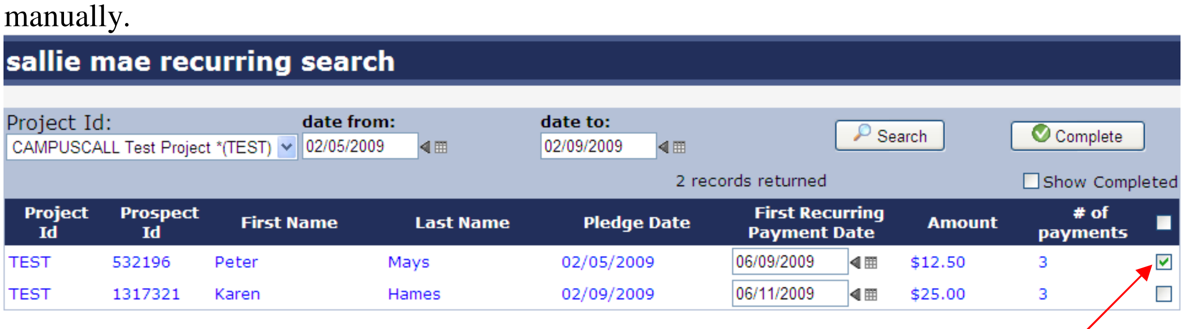


If payment has already been scheduled, you will see it in the Scheduled Payment section. To get back to the payment processing screen, click on the APS tab on the top and then the Schedule button on the following screen to get back to the payment scheduling page.

After completing the payment, you are redirected to the Payment History screen. If you see that the payment was already scheduled you can delete one of the duplicate payments by selecting the radio button next to it and clicking the Delete button.

Marking the Pledge Scheduling Complete

Sallie Mae does not send information back to CAMPUSCALL indicating whether or not the scheduling process has succeeded or failed. It is necessary for users to mark records complete manually.



To the right of every row on the main Sallie Mae Recurring screen there is a check box to be used to mark the pledge as complete. If all pledges on the screen are now complete, you can use the "Complete" button at the top to mark all pledge scheduling complete.

After the pledge row has been marked complete, it should disappear from the table. If you need to search for completed pledges check the "show completed" box.