

HARVARD
FINANCIAL ADMINISTRATION



Intro to TouchNet uPay

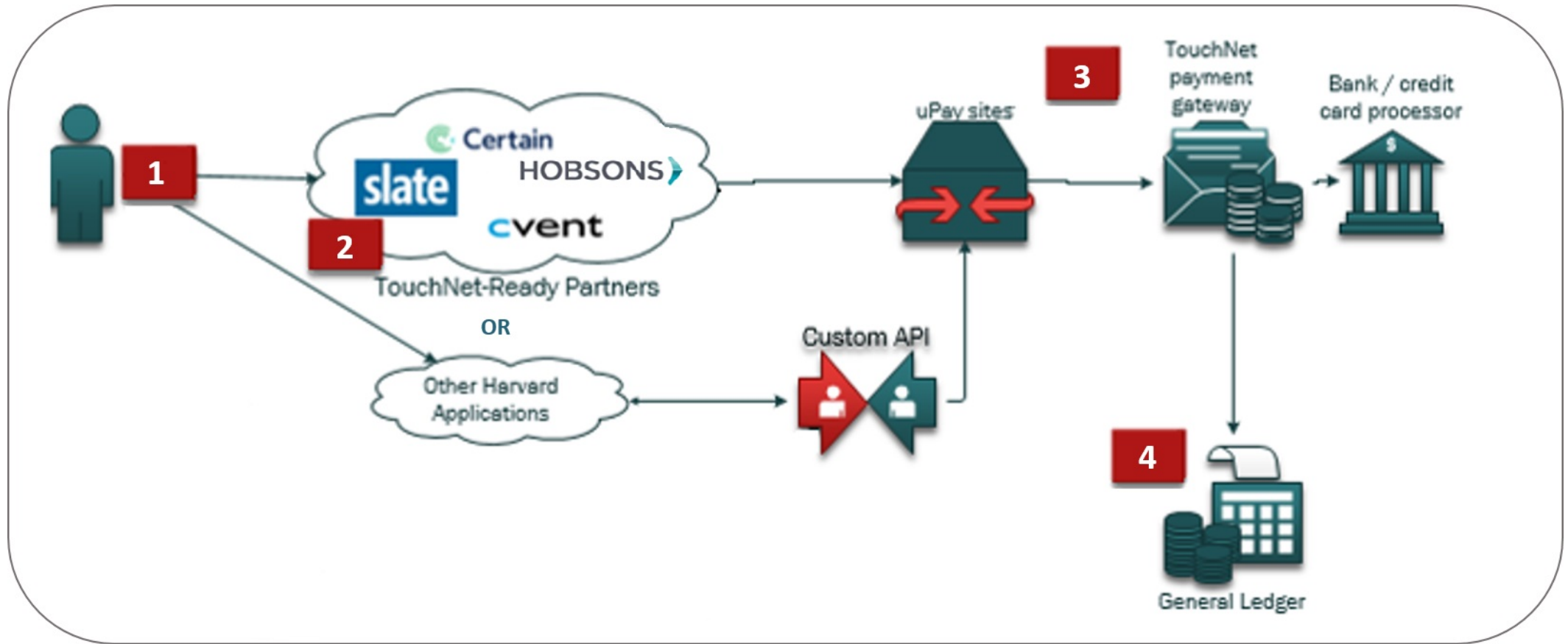
Office of Treasury Management
eCommerce

What is TouchNet uPay?

TouchNet uPay is a new payment gateway standard to use with existing front-end systems that process events, non-traditional educational offerings, and other products and services.

Schools/Units can easily integrate with uPay through existing TouchNet Ready Partners or a custom API (application program interface).

How uPay Works



- 1** Merchant: School / Unit / Department
- 2** Front-end System
- 3** TouchNet Environment
- 4** Department's Revenue Code(s)

Benefits

The TouchNet platform is higher-ed specific and is tailored to meet the unique needs of the University by:

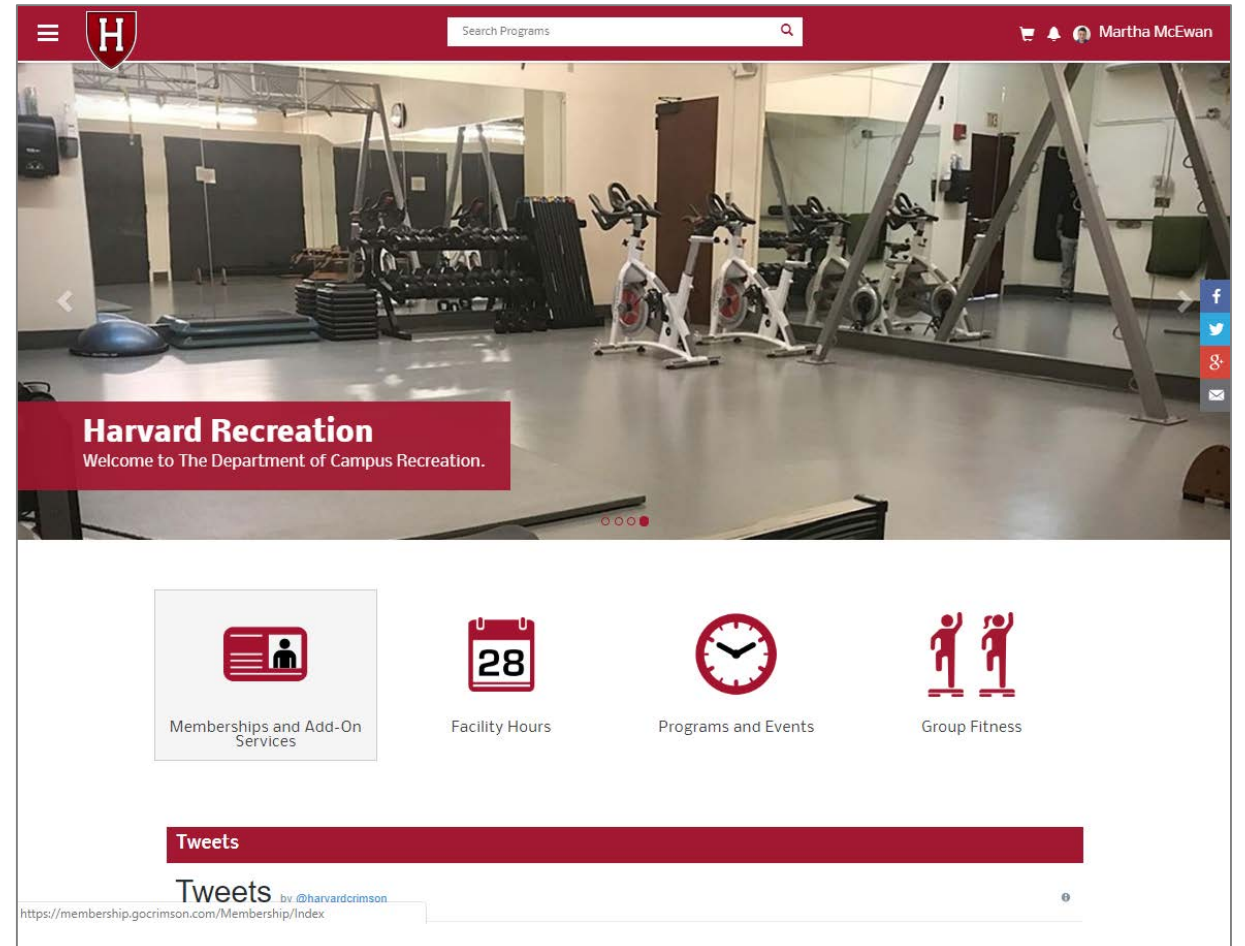
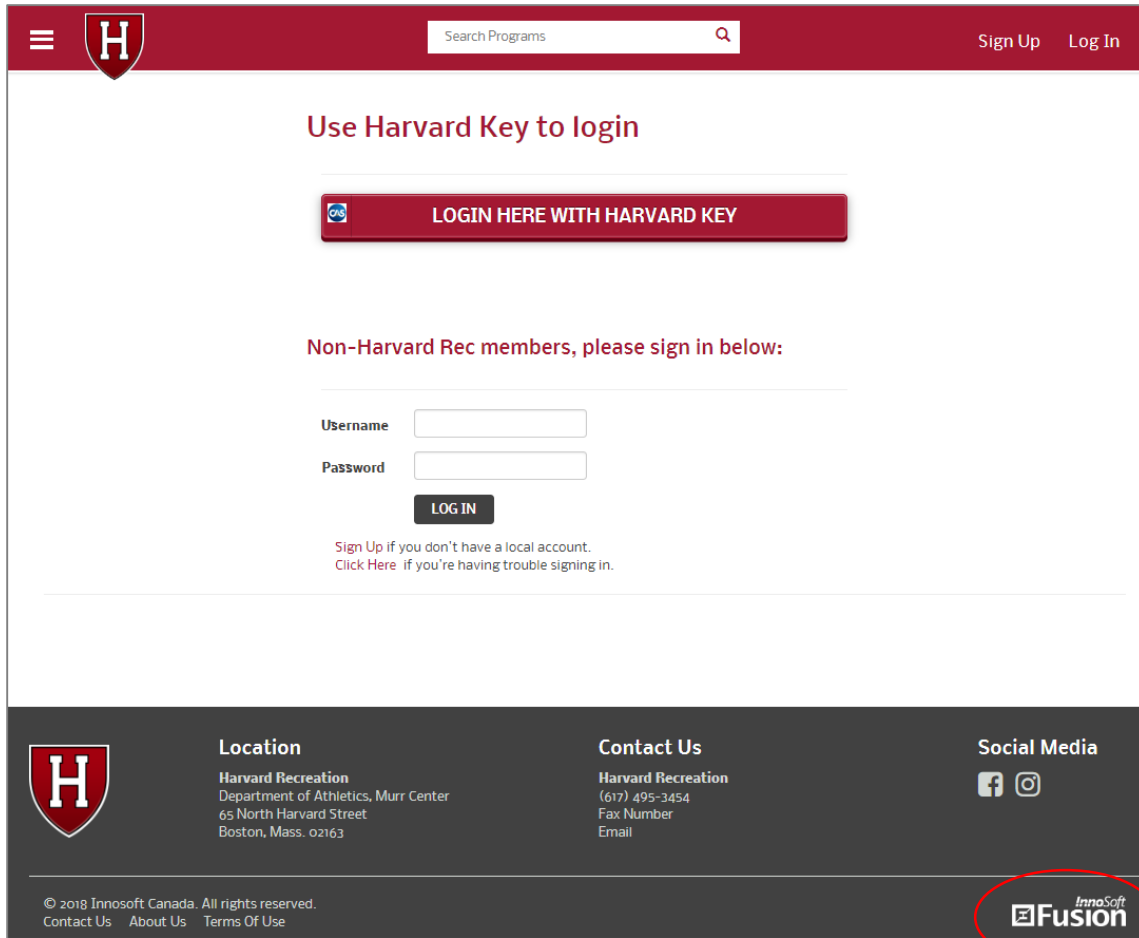
- **Providing a seamless, cost effective ecommerce solution in a fully PCI compliant environment (reducing PCI scope for the School/Unit)**
- **Automatically posting revenue to the General Ledger, eliminating the need for manual journaling**
- **Reducing the collection of cash, checks and wires**
- **Offering enhanced reporting**

TouchNet has over [100 TouchNet Ready Partners](#) who are 3rd party, front-end systems with approved interfaces between their application and Touch Net uPay.



Customer Experience

Customers begin by visiting 3rd party, front-end system to start shopping



This is the TouchNet Ready Partner website. Site appearance will vary by partner used.

When checking out, the customer will be directed from the 3rd party application to TouchNet uPay for secure credit card processing

The screenshot shows a shopping cart page with a red header. The header contains a menu icon, the Harvard University 'H' logo, and the user's name 'Martha McEwan' next to a notification bell and a shopping cart icon with a '1' badge. A white dialog box titled 'Are You Sure?' is centered on the screen. The dialog contains the following text: 'Clicking continue will take you to an external site to process your transaction. Once completed, you will be returned to this site to review your order.' Below this text is a bulleted list: 'Do not click BACK on your browser', 'Do not click Refresh/F5 on your browser', and 'Processing may take a few minutes'. At the bottom of the dialog are two buttons: 'CANCEL' and 'CHECKOUT'. The background shows a shopping cart table with one item: 'Membership Single - Academic Year' by 'Martha McEwan' for \$20.00. Below the table is a summary section with 'Subtotal: \$20.00', 'Tax: \$0.00', and 'Total: \$20.00'. At the bottom of the page are two buttons: 'CONTINUE SHOPPING' and 'CHECKOUT'. A 'Refund Policy' section is visible at the bottom left.

Are You Sure?

Clicking continue will take you to an external site to process your transaction. Once completed, you will be returned to this site to review your order.

- **Do not** click **BACK** on your browser
- **Do not** click **Refresh/F5** on your browser
- Processing may take a few minutes

CANCEL **CHECKOUT**

0-18194

Item	Quantity	Price	Total	Action
Membership Single - Academic Year	1	\$20.00	\$20.00	REMOVE

Subtotal: \$20.00
Tax: \$0.00
Total: \$20.00

CONTINUE SHOPPING **CHECKOUT**

Refund Policy

Participants enrolled in a program or class may transfer or withdraw until 7 days prior to the program start date. Transfers or refunds within 7 days, but before, the program start date will only be issued if a waiting list is active for the program and must be authorized by the Program Coordinator. Once the program has begun only a pro-rated credit will be issued. Programs, camps or classes may be cancelled if minimum registration numbers are not obtained prior to the start date. In this case a full refund will be issued. If a class is cancelled by Harvard Recreation, or due to weather it will be rescheduled at the next available time.

The payment takes place within the TouchNet uPay environment

← → ↻ 🏠 🔒 TouchNet Information Systems Inc [US] | https://secure.touchnet.net/C20832_upay/web/credit_card... ☆ 📧

Please enter your credit card information

Total:	\$20.00
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*** Indicates required information**

* Credit Card Type:

* Account Number:

* Expiration Date:

* Security Code: ([View example](#))

* Name on Card:

Billing Address of Credit Card

* Street Address 1:

Street Address 2:

* City:

* State:

* ZIP Code:







* Country:

* Email:

Day Phone:

Night Phone:

Mobile Phone:





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TouchNet uPay will redirect the customer back to the 3rd party application for confirmation

Payment information processed. Please wait and you will be redirected.



← → ↻ 🏠 🔒 https://membership.gocrimson.com/ProcessorResponse/Approval?UPAY_SITE_ID=0&EXT_TRANS_ID=O-O-18194

☰  Search Programs 🔍    Martha McEwan

Your Order was Processed Successfully

Payment was Successful
A receipt has been sent to you.

Martha McEwan **O-18194**

Item	Customer Name	Quantity	Unit Price	Total
Membership Single - Academic Year	Martha McEwan	1	\$20.00	\$20.00

Subtotal: \$20.00
Tax: \$0.00
Total: \$20.00

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A receipt from either the front-end system or TouchNet will be emailed to the customer

Notification of Payment

This message is an automated notification to inform you that your payment has been completed successfully. Please note that all payments are subject to approval and final verification.

Billed To:
Martha McEwan
74 Selwyn St.
Unit 1
Roslindale, MA
02131

Payment Information:
Payment Type: Credit Card
Card Type: Visa
*** Card Not Present ***

System Tracking ID: 8356
Date/Time: October 1, 2018 10:20:59 AM EDT
External Transaction ID: O-O-18194
Payment Gateway Reference Number: 20181001000008

Total Paid: \$20.00

Thank you
Athletics Membership

Example of TouchNet Receipt

ONLINE PURCHASE RECEIPT

Order Number: O-18194
Date: Monday, October 1, 2018 10:21:00 AM

Martha McEwan
ID#: 70858118
Card Number: *****1580
Card Type: Visa

ORDER DETAILS:

Item	Qty	Unit Price	Price
Membership Single - Academic Year	1	\$20.00	\$20.00

Subtotal \$20.00
Tax \$0.00


Total \$20.00

PAYMENT DETAILS:



Authorization #: 01739D
Transaction Ref #:

Example of Front-End System Receipt

Upay offers simple yet robust reporting

Athletics Membership: Payment Search Print Page 

Search for payments to view, refund, or cancel.

Payment Search	
Enter one or more filter values for payment search.	
System Tracking ID:	<input type="text"/>
Payment Gateway Reference Number:	<input type="text"/>
Credit Card Authorization Code:	<input type="text"/>
External Transaction ID:	<input type="text"/>
Linked Session Id:	<input type="text"/>
Customer Name:	<input type="text"/>
Customer Phone Number:	<input type="text"/>
Customer Email:	<input type="text"/>
Order Date:	From: <input type="text" value="10/01/18 12:00 AM"/>  To: <input type="text" value="10/01/18 11:59 PM"/> 

Steps to launching a TouchNet uPay site

1. Department fills out [TouchNet uPay application](#) and obtain approval from your Financial Dean or Equivalent
2. Harvard eCommerce Team provides the (Dept/School/Unit) with information for the TouchNet Ready Partner set-up
3. Department coordinates set up with their Vendor/TouchNet Ready Partner
4. Harvard eCommerce Team works with department to customize/brand site in the TouchNet Test environment and perform test payment transactions until successful
5. Harvard eCommerce team moves site into Production environment
6. Merchant contacts their TouchNet Ready Partner to connect to Production environment uPay site
7. After successful test payment transactions in Production environment, uPay site goes live

uPay Support Services Provided:

- Pre-service consulting, setup and configuration, system training, testing, and ongoing support
- PCI compliance impact and training

For more information contact Treasury Management's eCommerce Team at:
otm_ecommerce@Harvard.edu