# ePAYMENTS WEB FORM REGISTRATION

## CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Form Registry Options</td>
<td>1</td>
</tr>
<tr>
<td>Request Detail Options</td>
<td>2</td>
</tr>
<tr>
<td>General Configuration Options</td>
<td>3</td>
</tr>
<tr>
<td>Data Validation / Reporting (optional)</td>
<td>4</td>
</tr>
<tr>
<td>Notifications (optional)</td>
<td>5</td>
</tr>
<tr>
<td>Save The Form / Administration</td>
<td>6</td>
</tr>
</tbody>
</table>
WEB FORM REGISTRY OPTIONS

After logging into the Payment Gateway, in order to create a new payment form you must go to the Web Forms Group on the left hand side of the page. Under the Web Forms group select the Form Request Page.

The Web Form Registry page will appear on the right hand side of the screen. Now you can begin creating a new payment form.

Complete the Web Form Registry by entering data in the following fields (Fields that are in bold and with an * next to the name are required fields).

There are four initial pages associated with the Web Form Registry as shown by the tabs across the top of the page:

• Request Detail
• General Configuration
• Data Validation and Reporting
• Notifications

An additional fifth page called Administration will appear after the web form has been saved. The next sections will cover each of these pages in detail.

Access needs to be granted to Payment Gateway.
REQUEST DETAIL OPTIONS
Complete the Request Detail page by entering data in the following fields:

Purpose Of Request *
Enter a description of the payment form’s purpose. For example, conference registration, merchandise sale, etc. This field is required.

Gift/Events *
If the website will be collecting gifts/donations, please select the Gift radio button. By selecting the Gift radio button, all transaction detail from this form will be sent to the Advance Gift Administration System.
Note: All non-gift transactions should be configured as an Event.

Form Name *
The form name must be unique. For example, “Orientation Registration”, or “Tshirt Sales”.

Sponsoring Department/ Administrative Unit
This should be the department or administrative unit for whose event or sale the form is being created.

School/Division Name
This should be the School or Division that houses the Sponsoring Department.

Department Administrative Contact *
This is the NetID of the individual who is financially responsible for the site being created; the individual who generally has responsibility for the management of the school’s, department’s, program’s, or initiative’s funds. This individual will also be referred to as the Fiscal Administrator.
Note: You cannot type the NetID into the entry space. To select the NetID, click on the icon next to the entry space and search by NetID/Name within the selection list.

Department Technical Contact *
Provide the NetID of the individual responsible for creating and implementing the payment page. This individual will also be referred to as the Webmaster.
Note: You cannot type the NetID into the entry space. To select the NetID, click on the icon next to the entry space and search by NetID/Name within the selection list.

Merchant *
Fiscal Administrators and Technical Contacts must first be granted access to a merchant before it may be selected in this option. The Treasury Division is responsible for updating and granting access to merchants.
Note: You cannot type the Merchant name into the entry space. To select the Merchant, click on the icon next to the entry space and select the Merchant from the list.

Use Form Default CF (Chartfield)
This option allows you to set up your web form so it defaults to a pre-configured chartfield. Note: if you want the flexibility to pass different chartfields (submitted as hidden values) from your web form, leave this flag unchecked.

Fee Chart Field *
Provide all of the appropriate chartfields to properly account for the transaction expenses that will be incurred when accepting electronic payments. The Account, Fund, and Dept fields are required.
Note: Be sure to budget adequately for the fees associated with credit card and ACH transactions. Otherwise, the related journal entries will fail the budget-checking process and require budget modification before they can be posted. In the meantime, the net revenue will not be available to any reporting based on FAME data. It is recommended that you budget 2.5% of revenue + $.50 per transaction for fee expense.

Revenue Chart Field *
Provide all of the appropriate chartfields to properly account for the transaction expenses that will be incurred when accepting electronic payments. The Account, Fund, and Dept fields are required.

Additional Information
If you have any additional information you want to save with your form (e.g. comments, description of form purpose, creation dates), please add it here.

Remember to click the Save button once you’ve entered in all the information.

* required
GENERAL CONFIGURATION OPTIONS

Selecting the General Configuration tab within the Web Form Registry will allow you to enter data in the following fields:

Form Page URL
It is required that you provide the URL of the payment page posting transactions. Submissions from any other URL will not be accepted. If no URL is provided, then no transactions can be submitted. 
*Note: Make sure that all forms use the secure prefix of: https://*

Information About Success and Failure URLs
Payment Gateway users have the option to configure Success and Failure URLs in one of two ways:
1. Sending the FORM_SUCCESS_URL and FORM_FAILURE_URL included in the Payment Page POST
2. Using default Success and Failure URLs configured on this form
*Note: Regardless of which option is selected, the default Success and Failure URLs must be configured on this form.*

Post Transaction URL
Check Yes if you will be sending the FORM_SUCCESS_URL and FORM_FAILURE_URL in your form post.

Success
Provide the URL to the page you would like the user to see after a successful transaction.

Failure
Provide the URL to the page you would like the user to see after a failed transaction.
*Note: Again, the Success and Failure URL’s are required fields on the web form. These URLs should be the pages that your users see following the transaction confirmation screen. If the transaction was successful, it’s nice to thank your users for giving the University money. If the transaction failed, a little hand-holding is encouraged; perhaps provide your user with a telephone number that they may call to successfully complete their transaction.*

Send Transaction Details to Post-Transaction URLs
Selecting this checkbox will bypass the transaction confirmation screen and will allow you to post data back to the Success and Failure URLs provided above.
*Note: If this option is left unchecked, the individual processing a transaction will be transferred to a default confirmation or decline page. The individual will then be prompted to continue to the success or failure URLs. If this option is checked the default pages will be bypassed.*

Form Status
These are options to configure the status of your form. The 3 options are:

• Quality Assurance
• Production
• Disabled

*Note: Only Fiscal Administrators have the ability to change a form’s status.*

When testing your form, Quality Assurance status should be the default. Remember to click the Save button once you’ve entered in all the information.
**DATA VALIDATION / REPORTING (optional)**

If you’re being asked to collect sensitive information through your Web site, you must get written approval for doing so from a senior officer in your school or area and also get technical certification from ITS before you implement any application. Contact security@nyu.edu for more information.

Information that may be considered “sensitive”: social security numbers, driver’s license number (DLN), date of birth (DOB), mother’s maiden name, bank account numbers, NYU ID numbers.

NYU is subject to various federal, state and local regulations. Among these are the Federal Educational Rights and Privacy Act (FERPA), the Health Insurance Portability and Accountability Act (HIPAA), the Gramm-Leach-Bliley Act as well as NY State consumer protection regulations. You should also be aware of any NYU policies that impact your site. For these reasons and the general security concerns above, do not collect highly sensitive information on your site. Where necessary, use the NYU NetID as a unique identifier for NYU affiliates and consult ITS on proper use of the NetID.

In addition to the default required fields (LAST_NAME, FIRST_NAME, ADDRESS_LINE_1, CITY, STATE, POSTAL_CODE, COUNTRY, PHONE, and EMAIL) other required fields can be set on a per-form basis.

Absolutely need a user’s shoe size? Make it a required field by creating it here.

Additional fields will be evaluated for their compliance with NYU ITS policies.

Should you decide to add additional fields to your form, your form may optionally be configured to confirm that a value was passed for that field.

Selecting the Data Validation & Reporting tab within the Web Form Registry will allow you to enter data (and optionally create data validation) for the following fields:

<table>
<thead>
<tr>
<th>Sl. No. *</th>
<th>This is the number assigned to the new field you’re creating.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Column Name</strong> *</td>
<td>The Column Name must be the name of the form field that is posted from your payment page. This should be an intuitive representation for the field. For example, “shoeSize”.</td>
</tr>
<tr>
<td><strong>Column Display Name</strong> *</td>
<td>Create a Display Name for your field. For example, “Shoe Size”. This will appear on your reports (if selected)</td>
</tr>
<tr>
<td><strong>Include in Report</strong></td>
<td>If you wish for this field to be included on the additional data report, put a checkmark in this box.</td>
</tr>
<tr>
<td><strong>Validation Data Type</strong></td>
<td>From the drop-down menu, select the type of the data you’ve requested. For example, if the data type you’re collecting is a number field (e.g. shoe size, age), select Numeric. If it’s a text field (e.g. “color”) or combination of data (e.g. birthdate of “May 21, 1982”), select String.</td>
</tr>
<tr>
<td><strong>Validation Operator</strong></td>
<td>From the drop-down menu, select the operator that will signal how to validate the field (e.g. =, &gt;, &lt;, between, etc.).</td>
</tr>
<tr>
<td><strong>Validation Value 1</strong></td>
<td>Enter a value for which the operator will be compared against when performing data validation (e.g. = 0, &gt;, 1, etc.)</td>
</tr>
<tr>
<td><strong>Validation Value 2</strong></td>
<td>Enter a value for which the operator will be compared against when two values are necessary (e.g. between 1 and 10)</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>Status determines whether the field described is actively being validated. If checked, the field will be validated. If left unchecked, no validation will be performed. When you are finished, click the Save button. If you wish to add additional fields, click the Add New Column button. Enter in the above information for each new field you wish to add.</td>
</tr>
</tbody>
</table>

- Values are case-sensitive.
- Fields with an * next to them are required.
NOTIFICATIONS (optional)

Selecting the Notifications tab within the Web Form Registry will allow you to enter data in the following fields to add additional messaging and notification options:

Send “Thank You” confirmation message to user/payer?
Selecting this option will allow you to configure a custom Thank You message which will be emailed to your users. You may use ‘mail merge’ tags based on the default (and custom) form fields you’ve collected. The window will expand and you’ll be able to configure the following fields:

Email Subject
This is the subject of the confirmation email your users will receive. For example:

Thank You for Your Purchase!

Email From Address
This is the address from which the confirmation email will be sent. For example:

NYU Web Team <webteam@nyu.edu>

Email Body
This is the body of the confirmation email your users will receive. You can interpolate data that your user sent into the body of the message. To include data that your user sent, use the field name wrapped like %FIELD_NAME%. For example:

Dear %FIRST_NAME% %LAST_NAME%,

Thank you for your purchase totaling %TOTAL_AMOUNT_PAID%.

Note: Confirmation emails are sent as plain text. If you would like to send your users HTML emails or do more advanced data interpolation, configure a custom script below and send out your own email confirmations using the tool of your choice.

Send notification message to administrator upon completed transactions?
Selecting this option will allow you to send a report of successful transactions to a list of specified email addresses. The window will expand and you’ll be able to configure the following field:

Email Recipients
This is a comma-separated list of email addresses for those administrators who wish to receive notification of successful transactions. A text dump of submitted data will be sent, so this may or may not be human readable, depending on how form elements are named.

Send XML notification message to custom script?
Selecting this option will send a XML notification file to a script URL that you provide.

Often times there will be a desire for an application integrating the payment gateway to do stuff after the payment cycle is complete. Stuff includes:

• Notify a mail house to ship a purchased item
• Update inventory numbers
• Update enrollment numbers for a reservation system
• Send the payer further information via email

The window will expand and you’ll be able to configure the following field:

Notification Script URL
Provide the target URL for your notification script in the field provided.

When you are finished, click the Save button.
SAVE THE FORM / ADMINISTRATION

Once the web form has been properly saved, a fifth Administration tab will appear to the right. The Administration page provides access to specific forms for the Web Form Admin. By default the person who creates the form is made a Web Form Admin. Additional individuals can be added as either a Web Form Admin or a Web Report User.