

CyberSource Business Center



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Introduction

Welcome to the **CyberSource Business Center** – your complete resource for payment management. CyberSource provides fast, reliable, and secure electronic credit card processing for online giving and event registration transactions.

You must log into the **CyberSource Business Center** using a secure user ID and password to retrieve any information. No reports are sent to you.

- Information regarding single transactions (for example, a single on-line donation, a registration to an event) is found in the **Transaction** section.
- Information regarding recurring transactions (for example, installments of an online donation) is found in the **Subscription** section.

This manual covers the steps you will need to follow to access these functions:

- **Reports**
 - View and Download standard Reports
 - Use Report Consolidator
- **Transactions**
 - Search for Transactions
 - Credit a Transaction
 - Export Transaction Search Results
 - Capture Failed Transaction Reply Messages
- **Subscriptions**
 - Search for Subscriptions (also known as Recurring Transactions)
 - View and Report Subscriptions
 - Modify and Cancel Subscriptions
 - Set up Subscription Messages

CyberSource Business Center

How to access the CyberSource Business Center:

1. Go to **CyberSource Business Center**:
<https://ebc.cybersource.com/>
Be sure to bookmark this url for future reference.
2. The login page will display. See *figure 1*.
3. Confirm that you are accessing the **Live** Business Center.
4. Enter your **CyberSource Merchant ID**, **User Name**, and **Password**. For most users, your CyberSource Merchant ID and User Name are the same.
5. Click the **Login** button.

Note: If your CyberSource Merchant ID is pre-populated with the incorrect Merchant ID click the (change) link to enter a new Merchant ID. See *figure 2*.

Figure 1

Figure 2

Important!
For security purposes, users are locked out after entering an incorrect password three times.

Reports

CyberSource standard reports are available to you when logged into the Business Center. CyberSource Reports are used to reconcile against bank statements and your organization's reports for Event Management, Event Registration, Donations and/or Membership form transactions. You can download the following reports:

- Payment Batch Detail Report (see example in Appendix A)
- Payment Submission Detail Report
- Transaction Exception Detail Report
- Subscription Detail Report (if using recurring billing option)
- Payment Batch Summary Report
- Invoice Summary Report

The Payment Batch Detail Report is available daily to report on the previous day's transactions. It contains two important fields:

- **Transaction Reference Number:** used to reconcile CyberSource reports with your bank and processor reports.
- **Merchant Reference Number:** used to reconcile CyberSource reports with your Event Registration, Event Management, Donation and Membership Reports.

Report Search

Reports may be available daily, weekly, monthly, or by a custom date range. The Report Search Criteria dropdown list displays the reports for which you are subscribed. See Available Reports section below for a description of each report.

1. Login to the **CyberSource Business Center**.
2. Click **Reports** in the left navigation.
3. Click **Report Search** under Reports.
The **Report Search** page will display. See *figure 3*.
4. The top section of the page allows you to create on-demand reports to which you are subscribed (**Report Search Criteria**), using custom criteria (**Frequency**, **Date**).
5. The lower section of the page displays the reports available for the previous day.

Figure 3

Available Reports

Below is a list of generally available reports. Detail Reports contain specific information about each transaction. Summary Reports provide higher level cumulative information.

The reports you are subscribed to receive are specific to your account. Other reports may be available for an additional fee.

Invoice Summary Report	Shows a summary of the transactions that appear on your CyberSource invoice. This report is available monthly.
Payment Batch Detail Report (See Appendix A)	Shows information about credit card transactions. Use this report to reconcile with a bank statement.
Payment Submission Detail Report	Provides information about payment transactions that have been submitted to the processor. Identical to Payment Batch Detail Report except this report includes the payment processor as an additional column.
Payment Batch Summary Report	Shows the currency and payment method used for payment

	transactions. This report is available daily, weekly, and monthly.
Transaction Exception Detail Report	Shows detailed information about transactions that were flagged by CyberSource or by the processor because of errors sent in the request data of follow-on requests. For the Global Payment Services, this report applies to all primary and follow-on service requests.
Subscription Detail Report	Shows detailed transaction information for basic, installment, and recurring subscriptions.

These reports are available for download in XML or CSV formats. CSV format can generally be read using Microsoft Excel. See **Report Subscriptions** section below to modify download format.

Download a report

How to download a report:

1. Choose how you want to use the report, either Open or Save.
You may **click** or **right-click** (or Ctrl-click on a Mac OS) a file. In either case, your options are to open the file immediately or to save it to your computer.
 - If you click **Open**, the report opens in Excel (CSV) or in the browser (XML). However, some values may not be displayed correctly.
 - If you click **Save** or **Save Target As** (the recommended option), the Save As box opens. Choose a location for your file; a box shows the progress of the download:

Important!
When you download a CSV report, you must change the file extension .csv to .txt. If you do not, the file may become corrupted when you import the report into a spreadsheet.

2. Click **Close** when the download is complete.
3. For text files, import the report into a spreadsheet.
See **Appendix B: Importing Reports into a Spreadsheet** for more information. Screen captures show you the detailed process. For XML files, click the link of the appropriate DTD and copy the DTD to a text file on your computer.

Report Subscriptions

Access this section to change your report formatting options.

How to view your report subscriptions:

1. Login to the **CyberSource Business Center**.
2. Click **Account Management** in the left navigation.
3. Click **Report Subscriptions** under **Account Management**.
The Report Subscriptions page will display.
See figure 4.
4. Click the **Edit** link to modify the format for each report.

Figure 4

Report Consolidator

CyberSource Report Consolidator will allow you to pull a consolidated report for up to 6 months of transaction history. In some instances there may be a record limitation that can be addressed by pulling multiple smaller date ranges.

IMPORTANT!
CyberSource Report Consolidator must be installed on your computer, and the Reports to be downloaded must be turned on in the CyberSource Business Center.

Download Report Consolidator

How to download Report Consolidator:


1. Go the password-protected **Harris Connect Client Community Training Center**: <http://www.alumniconnections.com/olc/pub/COLC/>
2. Click the **Resource Center** link in the left navigation.
3. Click the **Training Center** link.
4. Scroll down to the **CyberSource Report Consolidator**.
5. Click the link **Download CyberSource Report Consolidator**. See figure 5.



Figure 5

Create A Report

How to create a Report:

1. Open **CyberSource Report Consolidator** The Report Consolidator will display. See figure 6.
2. Enter all required information.
3. Choose Report Type
4. Enter Result File (name and destination of your consolidated report) by first clicking on the browse button () to locate the appropriate folder/directory.
5. Enter the Result File name.
6. Click **Go** to download the report or click **Close** to exit CyberSource Report Consolidator. A message will display once the download has completed.

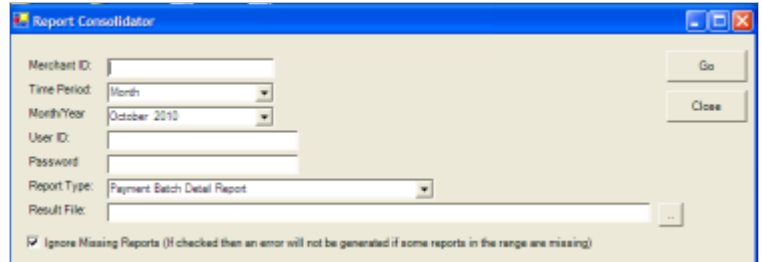


Figure 6

Open A Report

How to open a report:

1. Go to the folder where you saved the report.
2. Double click on the report name. The report will display as a .csv in Microsoft Excel. See figure 7.

See [Appendix B: Importing Reports into a Spreadsheet](#) for more information on how to format the report.

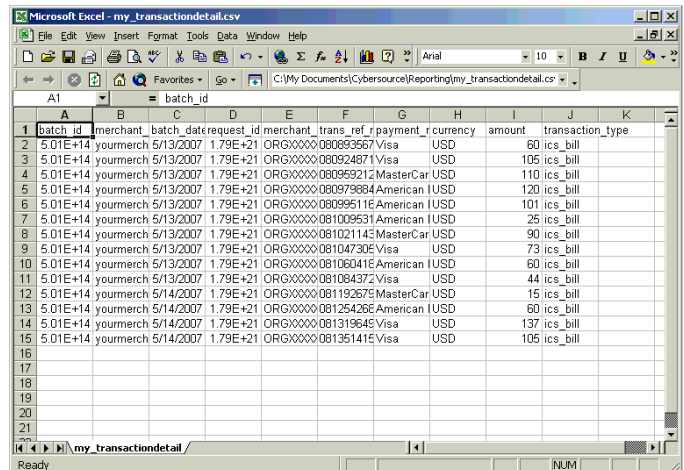


Figure 7

Transaction Search

Transaction Search allows administrators to search through large numbers of transactions to review details and perform many follow-on tasks. Data in the orders is stored for 6 months from the date of authorization. The results also show the current status of each order.

1. Login to the **CyberSource Business Center**.
2. Click **Transaction Search** in the left navigation. The Transaction Search menu will display in the left navigation.
3. Select **General Search**. See figure 8. The General Search form will display. See figure 9.
4. To select an **option**, click one of the radio buttons.
5. When you select an option, the appropriate field(s) becomes active; the others remain gray.

Note: Not all the search options listed in Figure 9 may apply to you or be located in the same menu options.

If you choose a field and value, the date range will be automatically set to the last six months. If you choose an application or a type of reply, the date range will be automatically set to today.

6. Select the **Date Range** for your search, from transactions processed during the last hour to those from the previous 1-6 months or a custom range that you define.

The search results include transactions requested between midnight on the start date and 11:59 P.M. on the end date. If you select a custom range, a special date and time menu appears with a calendar for easier selection.

To open the calendar, click the calendar icon and select the dates that you want by dragging your mouse over the days and the controls at the top.

To close the calendar, click the page outside of the calendar or the X at the top right of the calendar.



Figure 8

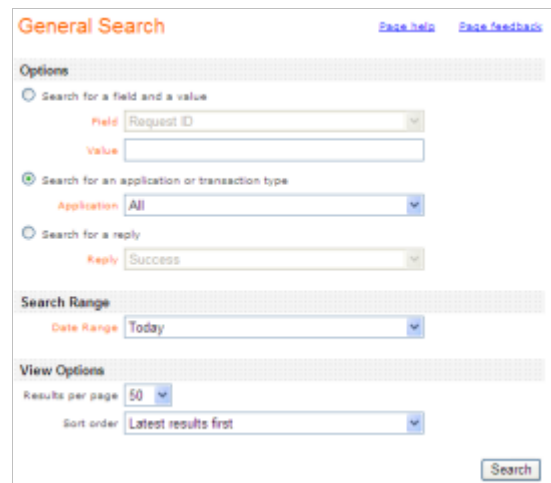


Figure 9

7. Select from 50 to 100 transactions to display under **View Options**
8. Select the **sort order** (most recent or oldest results displayed first).
9. Click **Search**. The Transaction Search Results will display. See figure 10.

Transaction Search Results

This page shows your search results in table format. See figure 10. An explanation of the headings is listed below. See figure 11.

If your search results contain more than the number of entries that you selected in the search page, you see links to the other results pages. Use the pagination arrows to navigate faster between pages:

>	The single arrow takes you to the next page.
>>	The double arrow with a bar takes you to the last page.

The screenshot shows a web interface titled "Transaction Search Results" with a search parameters section and a table of results. The search parameters include Date Range (Month to date), Application (All), and Matching Transactions (88). The table has 7 columns: Date and Time, Request ID, Merchant Reference Number, Name, Email Address, Amount, Account Suffix, and Applications. The results are sorted by date and time, showing transactions from October 2, 2010, to October 6, 2010. Applications listed include Credit Card Authorization, Credit Card Settlement, Subscription Creation, and Credit Card Settlement.

Figure 10

Data available for export is stored for 6 months from the date of authorization, and you can export up to 2,000 entries from any transaction search results. An entry can be an authorization or a settlement. A sale is entered twice: first as an authorization, second as a settlement. Therefore, 2000 entries may include 2000 authorizations and 2000 settlements.

CyberSource Merchant ID	Merchant ID that performed transaction
Date & Time	Date and time of the transaction
Request ID	Identifier generated by CyberSource that is a link to the transaction details for this failed request.
Merchant Reference Number	Identifier assigned to the order and generated from within your FORM.
Name	Customer Name
Email Address	Customer Email Address
Amount	Amount of the transaction with the currency.
Account Suffix	Last four digits of customer's payment account
Applications	Categories that fit your search criteria: green indicates <i>Success</i> , red indicates <i>Failure</i> , and black indicates <i>Did not run</i> . The list may also include applications that you did not request.

Figure 11

If you searched for errors or exceptions, this page reports errors found during the processing of your follow-on requests by CyberSource or by the processor. For some of the searches, you can click the column headings to arrange the rows in ascending or descending order.

When you search for related information in the details page, such as name, email address, account number, or payer authentication history, this page shows events that are related to the same transaction or to the same customer.

Exporting Search Results

The Exportable Search Results feature allows you to save the results of a transaction search as a report that you download and save in CSV format. The following fields are always exported:(See *figure 12.*)

Merchant ID	Name of the merchant who processed the transaction
Date and Time	Complete date and time of the transaction, for example: Aug 30 2010 11:15:17 AM
Request ID	CyberSource identifier for the transaction
Merchant Reference Number	Your order or reference number for the transaction For Event Management Example: ORGXXXXX234567 The first 3-4 characters will be your organization code (ORG Code) followed by a series of X's with the Event ID number next. For Event Registration, Donation and Membership Forms Example: ORG-2215-654321RHarrisU The first 3-4 characters will be your organization code (ORG Code) - followed by Form ID-,followed by Order ID (plus 200000), followed by these two optional fields: "R" indicates a recurring transaction **"Your Custom Text" indicates Custom Data for Payment Processor
Last Name	Customer's last name
First Name	Customer's first name
Email Address	Customer's email address
Amount	Amount of the transaction
Currency	Currency used for the transaction
Account Suffix	Last four digits of the customer's account number
Applications	Comma-separated list of the services that you requested with the result for each service, for example: <ul style="list-style-type: none">• Credit Card Authorization (Accept), Credit Card Settlement (Accept)• Tax Calculation (Accept), Credit Card Authorization (Accept), Credit Card Settlement (Accept), Advanced Fraud Screen (Accept)

Figure 12

*Various types of custom data can be sent to the payment processor to assist your organization in identifying and categorizing transactions. This option is called Custom Data for Payment Processor and can be configured in Event Registration and Donation Builder applications within the Edit Form Configuration tab (Payment Processing).

Export Transaction Search Results

How to export Transaction Search Results:

1. Click **Export Results**.
A browser download window appears. You can view the report online, or you can download it as a text file.
2. Name and save the file to your computer.
3. To import the text file into a spreadsheet, see **Appendix B: Importing Reports into a Spreadsheet**.

Transaction Search Details

This page shows all the information that pertains to the transaction you selected, in four sections:

- Request Information
- Customer Information
- Payment Information
- Offer-Line Details

How to access the Transaction Search Details:

1. Login to the **CyberSource Business Center**.
2. Click **Transaction Search** in the left navigation.
3. Click **General Search**.
4. Search for the transaction.
5. Click the **Request ID** link.
6. The **Transaction Search Details** page will display. See figure 13.

[Transaction Search Details](#) [Contact Support](#) [Page help](#) [Page feedback](#)

Request Information		Transaction Status Summary			
CyberSource Merchant ID	hems001	Status	Amount	Action	Date
Request ID	Z860136501130176174999	Credit Card Authorization	50.00 USD		Oct 02 2010 06:24:10 AM
Merchant Reference Number	LVS-62304-1333299	Credit Card Authorization		TRANSMITTED	Oct 02 2010 06:24:10 AM
Date	Oct 02 2010 06:24:10 AM	Credit Card Settlement	50.00 USD		Oct 02 2010 06:24:10 AM
Applications	Credit Card Authorization Credit Card Settlement	Available Actions: Credit Create Subscription View Codes See All Codes Re-Authorize and Settle View Receipt Similar Searches: By Name By Email Address By Account Number Related Transactions			
Reason Code	100				
Reply Message	Request was processed successfully.				
Client Library					
Client Application	SCHP API				
Client Application Version					
Client User					
Security Key ID					
Security Key Expiration Date					

Customer Information	
Billing Information	
Name	DIANE MCCOWAN
Company	
Address	1 Main Street Boston, MA 02108 US
Phone Number	
Email Address	dmccowan@hemsconnect.com
IP Address	

Payment Information				
Processor	Payment Method	Account Suffix	Expiration Date	
smartpay	Visa	1111	10/2012	
Credit Card Settlement	Authorization Code	Amount	Action	Trans Ref No
	88888	50.00 USD	TRANSMITTED	82026990WERUKQJ 100
	CVN	AVS		
		X - Match: address and 3-digit postal code match		
	Reply Message			
	Request was processed successfully.			
	Request Token			
	Ahj/rdRNNHkQ2BmwcQ0ikHD3ybNKLChFpVZd0TKTe0ta0yYcm8Na0nk900pAR0052nWlNajx58gTktYZ5kATMkHEBghQ5p			
Credit Card Authorization	Authorization Code	Amount	Action	Trans Ref No
	88888	50.00 USD		82026990WERUKQJ 100
	CVN	AVS		
		X - Match: address and 3-digit postal code match		
	Reply Message			
	Request was processed successfully.			
	Request Token			
	Ahj/rdRNNHkQ2BmwcQ0ikHD3ybNKLChFpVZd0TKTe0ta0yYcm8Na0nk900pAR0052nWlNajx58gTktYZ5kATMkHEBghQ5p			

Offer-Line Details						
Item	Quantity	SKU	Name	Type	Price	Tax
0	1			default	50.00	0.00 USD

Figure 13

Request Information

This section details the reasons for including this transaction in the search results:

- The **Merchant Reference Number** displays the identifying data generated from your Event Form or Donation Form and appears in your Event Reports and Donation Reports for reconciliation.
- The **Applications** line shows the categories that fit your search criteria: **green** indicates Success, **red** indicates Failure, and **black** indicates Did Not Run. The search criteria represent the applications that you requested through the Business Center. This line can also include applications that you did not request. The **Reply Message** explains the reply codes. See figure 14. The lines Reply and Reply Code also explain the result of the transaction.

Sample Reply Messages and Administration Actions

AVS Mismatch - AVS check failed	Have the registrant review the billing address used.
Invalid Credit Card - We encountered a Vital problem: VITAL reason: Invalid card number.	Have the registrant review the CC type and CC number being used.
Refused Credit Card - We encountered a Vital problem: Insufficient funds	Have the registrant try a new credit card.
Refused Credit Card - We encountered a Vital problem: Transaction not permitted-Card	Have the registrant attempt to register later or use another credit card.
Refused Credit Card - We encountered a Vital problem: Pick up card - Stolen	Have the registrant try a new credit card.
Processor Error - The payment processor returned an unexpected result: Connection refused: Vital	Have the registrant attempt to register later.

Figure 14

Important!
Administrators do NOT have the authority to settle failed transactions.

Customer Information

This section contains the customer's billing information, the shipping information, and email address.

Payment Information

This section shows the customer's complete payment information consistent with the payment type, including inconsistencies, such as a partially matched postal code associated with the customer's credit card. It also shows the **Transaction Reference Number** that is generated by Cybersource and may appear on your CyberSource and/or bank statements for reconciliation.

Payment Information							
Processor	Payment Method	Account Suffix	Expiration Date				
smartpay	Visa	1111	12/2012				
Credit Card Settlement	Authorization Code	Amount	Action	Trans Ref No	Reason Code		
	888888	20.00 USD	TRANSMITTED	8881019211102W8H	100		
	CVN	AVS	X - Match; address and 9-digit postal code match				
	Reply Message						
	Request was processed successfully.						
	Request Token						
	Ahp//v5R/PcjevM2m2w0tkHDVaxYRXLKtJYsGVdxITZk9tXgCmzd7bWwNIP/Q8ZY2LadY1qPH0080R/PcjevM2m2w0Ad8dy						
Credit Card Authorization	Authorization Code	Amount	Action	Trans Ref No	Reason Code		
	888888	20.00 USD		8881019211102W8H	100		
	CVN	AVS	X - Match; address and 9-digit postal code match				
	Reply Message						
	Request was processed successfully.						
	Request Token						
	Ahp//v5R/PcjevM2m2w0tkHDVaxYRXLKtJYsGVdxITZk9tXgCmzd7bWwNIP/Q8ZY2LadY1qPH0080R/PcjevM2m2w0Ad8dy						
Off-Line Details							
Item	Quantity	SKU	Name	Type	Price	Tax	Currency
0	1			default	20.00	0.00	USD

Off-Line Details

For **Event Management** transactions, this section shows you the detailed contents of the transaction, such as item, quantity, SKU, price, tax, currency, and any other element that applies to the item ordered or the services requested. Each line represents one item. The order ID is located in the SKU field behind "ordered_". The event item ID is located in the Type field after "pid_".

For **Event Registration** transactions, this section includes only a TOTAL price for the entire order (as appears above).

How to capture the Reply Message for a Failed Transaction

1. Login to the **CyberSource Business Center**.
2. Click **Transaction Search** in the left navigation.
3. Click **General Search**.
4. Search for the failed transaction.
5. Click the **Request ID** link.
The Transaction Search Details page will display.
6. View the **Reply Message** under **Request Information** and **Payment Information**.

Crediting a Transaction

Under certain conditions, you may wish to credit a transaction. The basic information about the transaction and the maximum amount that you may credit is displayed. 60 days after a transaction, a credit becomes a stand-alone credit. This credit does not require the Request ID.

IMPORTANT!

You can issue an unlimited number of follow-on credits for an unlimited amount, regardless of the amount of the original settlement. Before you submit the credit request, you will see a warning message to give you a chance to confirm that the amount entered for the credit is correct. To ensure the safety of your business, make sure to assign the permission to issue credits only to users that you trust and to review your assignments periodically.

1. Login to the **CyberSource Business Center**.
2. Click **Transaction Search** in the left navigation.
3. Search for the transaction.
4. Click the **Request ID** link. The Transaction Search Details page will display.
5. Click the **Credit Link**. See *figure 15*. The Credit Card Credit page will display. See *figure 16*.
6. Enter the amount that you wish to credit in the Credit Amount box
7. Click the **Credit** button. A warning message appears asking you to confirm the amount you would like to credit.
8. Click **OK** to credit for the amount that you entered; otherwise, click **Cancel**. The Transaction Search Details page reappears with a success message

Transaction Search Details [Contact Support](#) [Page help](#) [Page feedback](#)

Request Information		Transaction Status Summary			
CyberSource Merchant ID	hama001	Status	Amount	Action	Date
Request ID	288001980940176174598	Credit Card Authorization	10.00 USD		Oct 28 2010 06:19:38 AM
Merchant Reference Number	370-1284575R	Credit Card Settlement	10.00 USD	TRANSMITTED	Oct 28 2010 06:19:38 AM
Date	Oct 28 2010 06:19:38 AM				
Applications	Credit Card Authorization Credit Card Settlement				
Reason Code	100				
Reply Message	Request was processed successfully.				
Client Library					
Client Application	DCMP API				
Client Application Version					
Client User					
Security Key ID					
Security Key Expiration Date					

Available Actions: [Credit](#), [Create Subscription](#), [New Order](#), [Set Amount](#), [Set Amount and Settle](#), [View Report](#)

Similar Searches: [By Name](#), [By Email Address](#), [By Account Number](#), [Related Transactions](#)

Figure 15

Credit Card Credit [Page help](#) [Page feedback](#)

Enter the amount that you would like to credit.

Transaction Details	
Request ID	28198111601022229846
CyberSource Merchant ID	hama001
Settlement Amount	10.00 USD
Prior Credits	0.00 USD
Account Number	*****1111
Credit Amount	<input type="text"/>

Figure 16

Note: To view more details of the original transaction, click the link next to Request ID.

Subscriptions

Recurring gifts or recurring transactions (sometimes called installment gifts) are known as **Subscriptions** within Cybersource. Organizations using the Recurring Payment feature within the Donation/Membership Forms or the Event Registration application will use the Subscription feature to search for subscriptions and subscription payments.

Searching for Subscriptions and Subscription Payments

With the subscription search feature, you can conduct a narrow search (a subscription associated with a specific credit card) or a broad search (all subscriptions that end before a certain date, for example). In many cases, the subscription ID or the credit card number is more likely to identify the subscription that you want than any of the other options. After you find a list of results, you can view the details of the subscriptions and perform many actions on the subscriptions. The results also show the current status of each subscription.

When searching for subscriptions, you can narrow your search to active, on hold, or canceled subscriptions, date of creation or of expiration, card expiration date, or a specific field or value. When searching for future payment events, you can narrow your search to payments that are scheduled, require approval, or have been skipped. After you select one of the options, the appropriate sub-menu appears below.

How to search for a subscription or subscription payments:

1. Login to the **CyberSource Business Center**.
2. Click **Tools & Settings** in the left navigation. The Subscription menu will display in the left navigation.
3. Click **Search**. The Subscription Search page will display. See *figure 17*.
4. Select the type of search: subscriptions or payments.

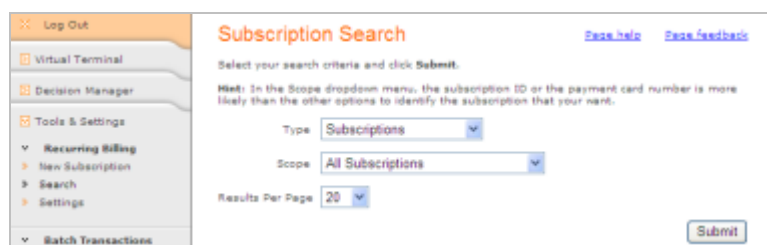


Figure 17

- **Subscriptions:** a number of reports are available to view and/or download, including subscriptions or credit cards that expire before a certain date or subscriptions that have been canceled or put on hold. After the approval or due date for a payment has passed, you can search for the subscription only in this section as described in the note above. From the list of subscriptions that you receive, you can click the subscription ID to see the details and perform a one-time payment or credit, approve or skip a payment, and modify or cancel a subscription.
- **Subscription Payments:** future payments scheduled before a certain date, future payments that require prior approval, or past and future payments skipped or scheduled to be skipped before a certain date. From the list of subscriptions that you receive, you can skip or un-skip, approve, and modify the amount of a payment. In addition, you can click the subscription ID to see the details and perform the same actions as described above.

5. Choose the scope for your search: broad or narrow (field and value):

Subscriptions	Subscription Payments (date range)	Field and Value (both)
All Subscriptions Active Subscriptions On-Hold Subscriptions Canceled Subscriptions Creation Date of Subscriptions Expiration Date of Subscriptions Expiration Date of Payment Cards	Payments Scheduled Payments Requiring Approval Payments Skipped	Credit card number Last name Last name and first name Order number Subscription ID Subscription title

6. The search results will include transactions requested between midnight on the start date and 11:59 P.M. on the end date.
7. Choose the number of transactions that you want to display on each page of results (20–100).
8. Click **Submit**. The **Subscription Search Results** will display. *See figure 18.*
9. Click the **Subscription ID** link to view the details page for the subscription where you will always have these options (except for canceled subscriptions): One-time Payment, Modify Subscription, and Cancel Subscription.

Subscription Search Results [Page help](#) [Page feedback](#)

Search Parameters:
Last Name = grimes

Currency	Number of Subscriptions	Total Amount
USD	2	600.00
TOTAL	2	

Delete	Subscription ID	Name	Type (Frequency)	Amount	Creation Date	Start Date	End Date	Date of Next Scheduled Payment	Number of payments in retry mode	Card Expiration Date	Number & Amount of Successful Payments to Date	Status
<input type="checkbox"/>	278961796000323223661	IDELLA GRIMES	instalment (quarterly)	300.00 USD	Jul 12 2010	Jul 13 2010	Apr 13 2012	Jan 13 2011	0	09/2012	2 600.00	Current
<input type="checkbox"/>	278961499000323223667	IDELLA GRIMES	instalment (semi-annual)	300.00 USD	Jul 12 2010	Jul 13 2010	Jan 13 2012	Jan 13 2011	0	09/2012	1 300.00	Current

Figure 18

If you are using recurring billing, the Subscription Detail Report will appear in your list of downloadable reports. This report is generated only when there is data for it to display. This report includes two lists:

- Corrective Action (On Hold) – subscriptions in this list are on hold because they need immediate attention. Either all retries have been exhausted or a payment failed for a reason that requires your intervention, such as an expired credit card.
- Retry Mode – subscriptions in this list are in retry mode because CyberSource is making attempts to process payments that have failed. These subscriptions are in danger of going on hold.

Modify A Subscription

Administrators can modify most of the information for a subscription, except for the order or reference number, the type of subscription, the start date, the billing frequency, and the number of payments. If you change the amount of one or more payments, all future payments that have already been approved are automatically un-approved. To modify a subscription, click the Modify Subscription button at the bottom of the page and edit the form.

Modify a Subscription

How to modify a subscription:

1. Login to the **CyberSource Business Center**.
2. Click **Tools & Settings** in the left navigation. The Subscription menu will display in the left navigation.
3. Click **Search**. The Subscription Search page will display.
4. Choose appropriate Type and Scope.
5. Click **Submit**. The **Subscription Search Results** will display.
6. Click the **Subscription ID** link. The **Subscription Details** page will be returned. *See figure 19.*
7. Click tab at top of page for information to be modified: Subscription Information, Payment Information, Payment History, or Scheduled Payments. Click the **Modify Subscription** tab at the bottom of the page.

Subscription Details [Page help](#) [Page feedback](#)

View details, skip payments, modify, cancel, delete or make an on-demand payment below.

Subscription ID: 287430783000323298649

Subscription Information	Payment Information	Payment History	Scheduled Payment(s)
--------------------------	---------------------	-----------------	----------------------

Subscription Type: Installment (fixed number of payments and a frequency)
Title:
Amount: 100.00 USD
Setup Fee: 0.00 USD
Start Date: Oct 19 2010
Billing Frequency: Weekly
Payments Completed: 1
Payments Pending: 9
Status: Current
Automatic Renewal: Not Enabled
Approval Required: No

Billing Information

Name: HELEN MCGOWAN
Company:
Customer ID:
Address 1: 8 Francis Drive
Address 2:
City: Middleton
State: Massachusetts
Postal Code: 01950
Country: United States
Phone Number:
Email Address: diane.mcgowan@comcast.net

Shipping Information

Name:
Company:
Address 1:
Address 2:
City:
State:
Postal Code:
Country:

Order Information

Order/Merchant Reference Number: LVS-64453-141872LR
Comments:
Merchant-Defined Data Field 1:
Merchant-Defined Data Field 2:
Merchant-Defined Data Field 3:
Merchant-Defined Data Field 4:
Encrypted Data Field 1: empty
Encrypted Data Field 2: empty
Encrypted Data Field 3: empty
Encrypted Data Field 4: empty

Make On-Demand Payment or Credit **Modify Subscription** Cancel Subscription Delete

Figure 19

8. The **Edit Subscription** page will be returned. All fields shown in **color** are required. After making all changes, click Submit button. See *figure 20*.
9. This message will be returned at top of page:

Success: Subscription successfully updated.

Edit Subscription [Page help](#) [Page feedback](#)

Make all the changes that you want to the subscription. All fields shown in color are required.

Customer Information (To expand or collapse, click triangle.)

Customer ID

First/Last Name

Company

Street Address 1

Street Address 2

City/State/Postal Code

Country

Phone Number

Email Address

Shipping Information

First/Last Name

Company

Street Address 1

Street Address 2

City/State/Postal Code

Country

Order Information (To expand or collapse, click triangle.)

Order/Merchant Reference Number

Description and Comments

(You can enter a maximum of 256 characters without line breaks.)

Merchant-Defined Data Field 1

Merchant-Defined Data Field 2

Merchant-Defined Data Field 3

Merchant-Defined Data Field 4

I accept the [Terms for Usage of Merchant-Defined Data Fields](#)

Encrypted Data Field 1

Encrypted Data Field 2

Encrypted Data Field 3

Encrypted Data Field 4

Subscription Information (To expand or collapse, click triangle.)

Subscription Type

Installment Transaction

Title

Recurring Amount

Currency

Start Date

Billing Frequency

Number of Payments

Number of Payments to Add

Require approval before processing payments

Automatically renew this subscription

Payment Information (To expand or collapse, click triangle.)

Payment Type

Card Information

Card Type

Card Number

Card Expiration Date

Bill Payment with Visa

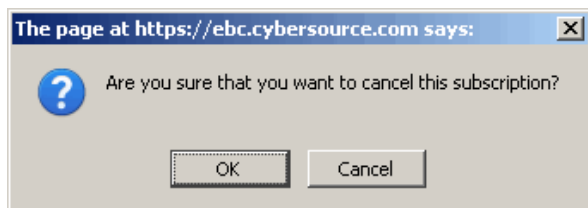
Figure 20

Cancel A Subscription

You can cancel a subscription at any time. After you do so, you can still find the subscription if you search for canceled subscriptions.

How to cancel a subscription:

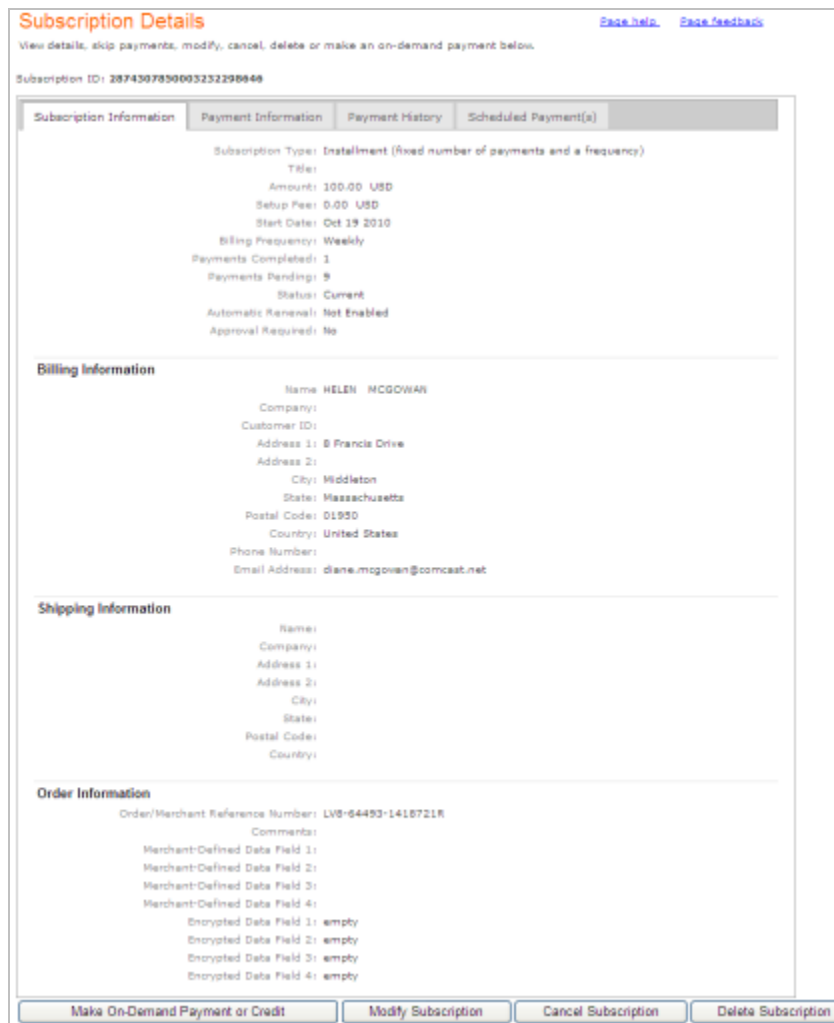
1. Login to the **CyberSource Business Center**.
2. Click **Tools & Settings** in the left navigation. The Subscription menu will display in the left navigation.
3. Click **Search**. The Subscription Search page will display.
4. Choose appropriate Type and Scope.
5. Click **Submit**. The **Subscription Search Results** will display.
6. Click the **Subscription ID** link. The **Subscription Details** page will be returned. See figure 21.
7. Click the **Cancel Subscription** tab at the bottom of the page. A verification message will appear. See figure below.



8. Click **OK**. The **Subscription Transaction Details** page refreshes with a with a success message:

Success: Subscription successfully updated.

IMPORTANT!
You cannot reinstate a canceled subscription.
Instead, you must create a new one.



Subscription Details [Page help](#) [Page feedback](#)

View details, skip payments, modify, cancel, delete or make an on-demand payment below.

Subscription ID: 2874307850003252298646

Subscription Information	Payment Information	Payment History	Scheduled Payment(s)
Subscription Type: Installment (fixed number of payments and a frequency)			
Title:			
Amount: 100.00 USD			
Setup Fee: 0.00 USD			
Start Date: Oct 19 2010			
Billing Frequency: Weekly			
Payments Completed: 1			
Payments Pending: 9			
Status: Current			
Automatic Renewal: Not Enabled			
Approval Required: No			

Billing Information

Name: HELEN MCGOWAN
Company:
Customer ID:
Address 1: 8 Francis Drive
Address 2:
City: Middleton
State: Massachusetts
Postal Code: 01950
Country: United States
Phone Number:
Email Address: hlane.mcgowan@comcast.net

Shipping Information

Name:
Company:
Address 1:
Address 2:
City:
State:
Postal Code:
Country:

Order Information

Order/Merchant Reference Number: LVB-64493-1416721R
Comments:
Merchant-Defined Data Field 1:
Merchant-Defined Data Field 2:
Merchant-Defined Data Field 3:
Merchant-Defined Data Field 4:
Encrypted Data Field 1: empty
Encrypted Data Field 2: empty
Encrypted Data Field 3: empty
Encrypted Data Field 4: empty

Make On-Demand Payment or Credit Modify Subscription Cancel Subscription Delete Subscription

Figure 21

Appendix A: Payment Batch Detail Report

This report contains summary information about credit card transactions. The report includes only transactions that CyberSource has sent to the payment processor. The following fields are exported:

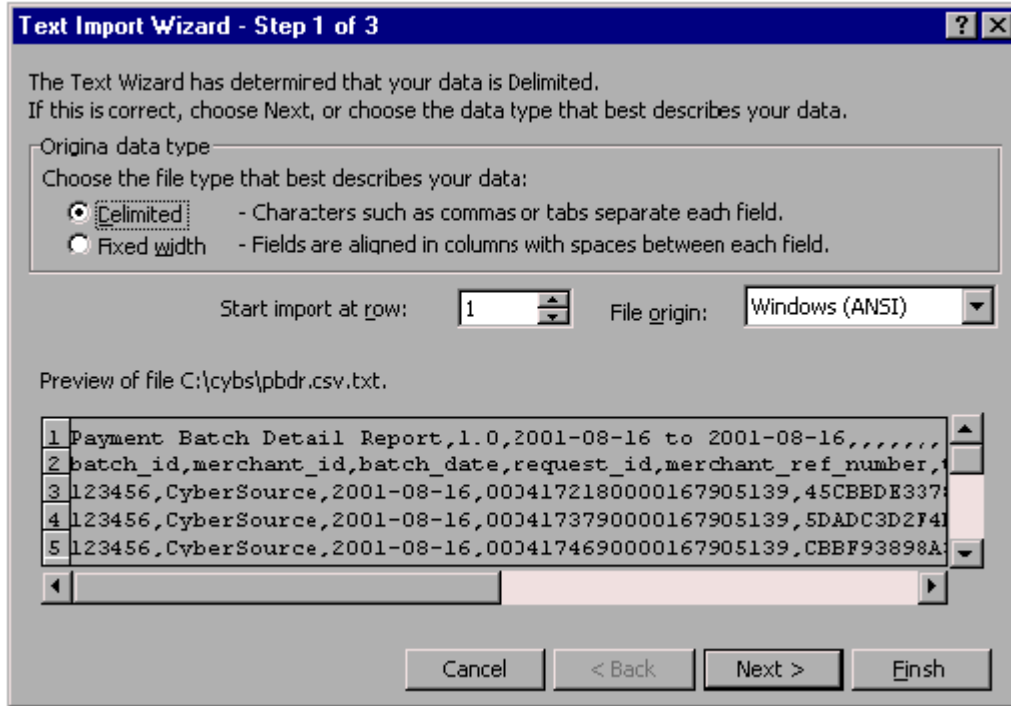
Batch ID	CyberSource batch in which the transaction was sent.
Merchant ID	CyberSource merchant ID used for the transactions in the report.
Batch Date	Date when the batch was sent to the processor.
Request ID	CyberSource identifier for the transaction.
Merchant Reference Number	<p>Merchant-generated order reference or tracking number.</p> <p>For Event Management (legacy): The first 3-4 characters will be your organization code (ORG Code) followed by a series of X's with the Event ID number next. For example: ORGXXXXX234567</p> <p>For Event Registration Form or Donation Form: The first 3-4 characters will be your organization code (ORG Code) – Form ID – Order ID (plus 200000). Optional fields: “R” indicates a recurring transaction “your text” indicates Custom Data for Payment Processor * For example: ORG-215-654321RHarrisU (where Form ID is 215, Order ID is 454321, R indicates recurring transaction, HarrisU references custom text designation related to the form ID)</p>
Transaction Reference Number	Reference number generated by CyberSource that you will use to reconcile your CyberSource and processor reports with your bank statement.
Payment Method	Type of card or bank account.
Currency	ISO currency code used for the transaction.
Amount	Amount of the transaction.
Transaction Type	CyberSource payment application processed for the transaction.

Appendix B: Importing Reports into a Spreadsheet

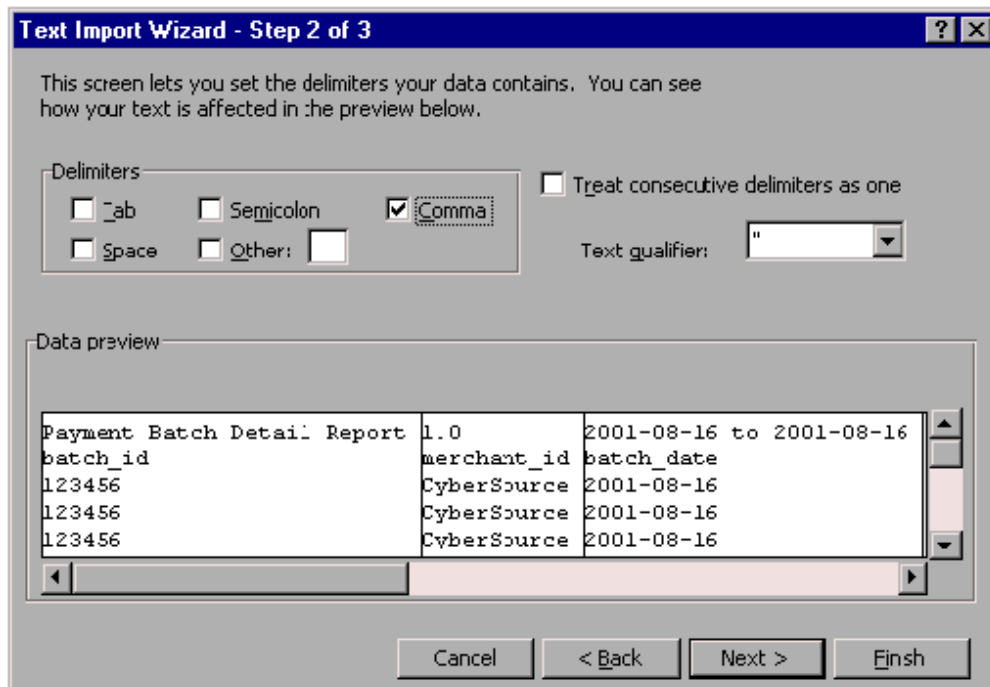
To import a report into Microsoft Excel for Windows, follow these steps.

1. Open **Microsoft Excel**.
2. Click **File > Open**. The Open dialog box appears.
3. In the Files of type list, select **All Files (*.*)**.
4. Select the report file to import.
5. Click **Open**.

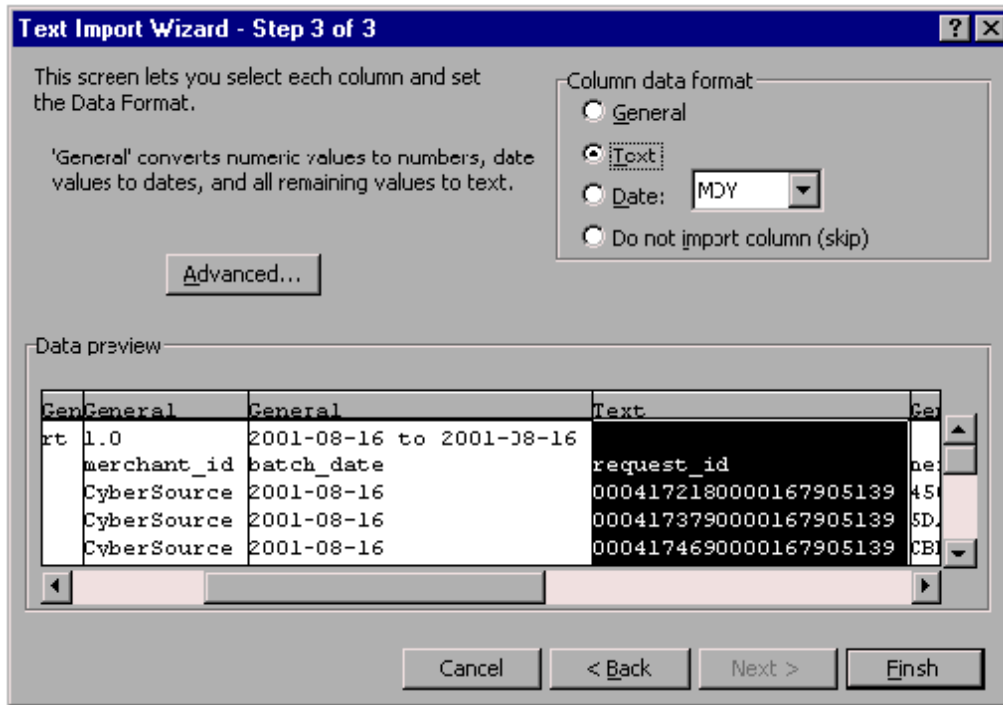
The Text Import Wizard dialog box appears:



6. Select **Delimited** if not already selected.
 7. Click **Next**.
- Excel displays step 2 of the Text Import Wizard:



8. In the Delimiters section, un-check **Tab** and check **Comma**.
In the Data preview section, Excel shows how it will import your data.
9. Click **Next**.
Excel displays step 3 of the Text Import Wizard:

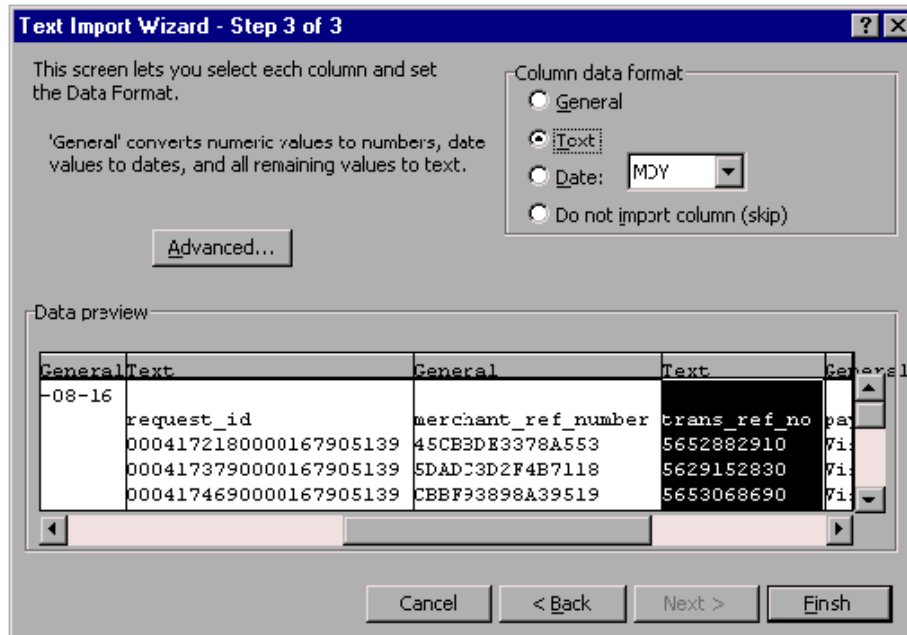


10. In the Data preview section, click the column of the report that shows the request ID, and select **Text** in the Column data format section (top right):

IMPORTANT!
If you do not click Text, Excel deletes part of the request ID from the report.

For the Payment Batch Detail Report or the Payment Submission Detail Report, it is the fourth column of the report as in the screen capture above.

11. If you are importing the Payment Batch Detail Report or the Payment Submission Detail Report, click the column of the report that shows the transaction reference number for each transaction, which is the sixth column of the report, and select Text in the Column data format section:



12. Repeat Step 10 for any other column that includes a number longer than eight digits, such as the merchant reference number.
13. Click **Finish**.
Excel imports the report.

Note: The request IDs in the report should not contain any decimal places. If they appear as numbers with decimal places and exponents, such as 4.22353E+18, import the report again, and make sure to complete Step 10.

Appendix C: Setting up Email Notifications to Donors Regarding Transactions

This feature is available only for installment and recurring subscriptions, not for single transactions. CyberSource can send emails to your customers on your behalf to alert them about events related to their subscriptions. **Your customers will receive an email notification only if you check one or more of the “Send Email Message” boxes on the page, then click the Submit Changes button.**

How to create Email Notifications:

1. Login to the **CyberSource Business Center**.
2. Click **Tools & Settings** in the left navigation. The Subscription menu will display in the left navigation.
3. Click **Settings**. The **Subscription Settings** page will display.

IMPORTANT!
DO NOT EDIT the top two sections
Subscription Processing Options and
Payment Information or your processing will
fail.

Subscription Settings [Data help](#) [Data feedback](#)

If you want your customers to receive email messages, complete one or more of the sections below. For each type of email message that you want to send, enter the text that you want to appear at the top and bottom of the message. You can change your selections and the content of the headers and footers at any time.

Subscription Processing Options ?

Payment Information ?

Pre-Notification Message ?

Send Email Message

Header

Amount

Body

Amount

Footer

Amount

Successful Payment Message ?

Send Email Message

Header

Amount

Body

Amount

Footer

Amount

Failed Payment Message ?

Send Email Message

Header

Amount

Body

Amount

Footer

Amount

There are three types of notifications available: **Pre-Notification Message**, **Successful Payment Message**, and **Failed Payment Message**.

For each type of notification that you want to send, you need to enter the text that will appear in each section of the message. The header is located below the subject and date line of the email template. You can change the content of your messages at any time. Different parts of the email messages are set to the default content provided by CyberSource.

IMPORTANT!
 Because you cannot receive a blind copy of these messages, CyberSource recommends that you test all messages to ensure that the text and formatting of your headers and footers appear as desired.

Pre-Notification Message	You can use this email message to notify your customers of an upcoming payment. CyberSource sends this message seven days before processing the payment. When a payment card is due to expire within 60 days, CyberSource adds a paragraph with this information to the message.
Successful Payment Message	You can use this email message to notify your customers of a successful subscription.
Failed Payment Message	You can use this email message to notify your customers when a subscription goes on hold.

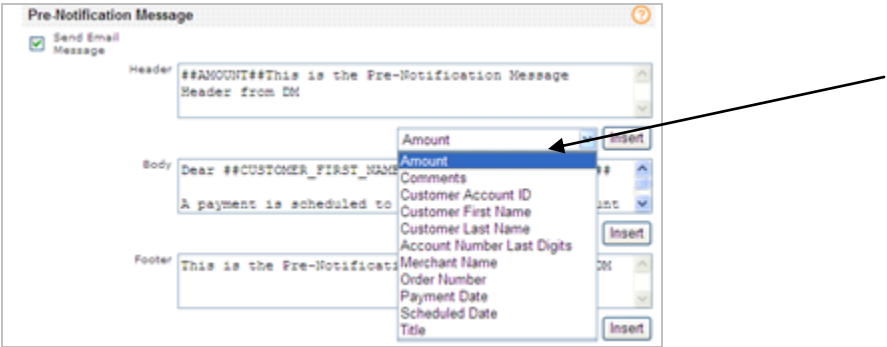
Header

Use the header to add a message about your company appropriate for the type of email message, such as: Harris University thanks you for your most recent payment towards your pledge.

Footer

Use the footer to add a message to give the customer your contact information, such as: If you have any questions, please visit us at www.yourorganization.com or call us at 999-555-1111.

Email Parameters (Smart Tags) (Optional)



To add donor-specific information to the messages, use the smart tags available in the dropdown menu below the **Header**, **Body** and **Footer** sections for each message type (see above). For example, you could add the customer's ID followed by the customer's name to the header. You can insert any of the tags available in the table below, following these steps:

- Anchor your cursor where the tag should appear inside the Message.
- Open the dropdown menu and highlight the tag you wish to use.
- Click Insert button.
- The tag will be enclosed within with two pound signs (##).
- Click Submit Changes button at bottom of page.

Note that if no data exists for the tag that you chose, nothing will appear in the donor's copy of the message.

Parameter Name	Description
Amount	Amount of the payment
Comments	Optional comments that you included when creating the subscription
Customer Account ID	Optional account ID, tracking number, reward number, or other

	unique number that you assign to the customer
Customer First Name	Customer's first name
Customer Last Name	Customer's last name
Account Number Last Digits	Card number with all but the last four digits masked
Merchant Name	Merchant's name
Order Number	Order or merchant reference number that you assigned to the customer's subscription
Payment Date	Date that a successful payment or failed payment attempt was processed
Scheduled Date	Date of an upcoming payment that is used for the pre-notification email
Title	Title of the subscription

Sample Successful Payment Email

This example shows how you can construct an email message template by combining smart tags with your own custom text.

	Your customized message template	Message as received by your customer
Header	##MERCHANT_NAME## Payment due: ##SCHEDULED_DATE## Your account number: ##CUSTOMER_ACCOUNT_ID##	Harris University Payment due: 10/5/2006 Your account number: 230985
Body	Dear ##CUSTOMER_FIRST_NAME## ##CUSTOMER_LAST_NAME## , A payment has been charged to your account. For: ##TITLE## On: ##PAYMENT_DATE## Amount: ##AMOUNT## Account Suffix: ##ACCOUNT_NUMBER_LAST_DIGITS##	Dear Jane Doe, A payment has been charged to your account. For: Monthly Pledge Amount On: 10/5/2006 Amount: \$15.00 Account suffix: 2384
Footer	Thank you. Customer Support <i>(note that this section uses text only, no tags)</i>	Thank you. Alumni Office