UBF Checkout - Credit Card Processing/Authorization Online

- For access to process credit cards via Checkout go to http://www.ubfoundation.buffalo.edu Service Revenues, UBF Checkout, Setup Form. Or contact Cindy Johannes develj@buffalo.edu. Provide your:
  - University at Buffalo UBIT user name. If you do not know your UBIT user name, visit http://cit-helpdesk.buffalo.edu/services/faq/account.shtml
  - E-mail address
  - UB Foundation account that will receive credit card payments
  - Service type (merchandise, registration, etc.)

- Once your UBF Checkout account is established with UB Foundation, you may process credit cards. The purchaser’s credit card is charged immediately. The funds will automatically be credited to the UBF account. Please note the charge transaction is in the name of UBF Activities Online on a card holder’s credit card statement.

- Go to http://www.ubfoundation.buffalo.edu/checkout/form or once on UBF’s website, click on Credit Card Form in the left hand tool box.

- Enter your UBIT user name and password.

Login Required

UBITName
Password
Log In

I don’t know my password
Find my UBITName
Help
UBF Checkout Manual Payments

* items are required

1) * Site
   1586 - ACADEMIC HEALTH CENTER

2) * UBF Account
   9331669026 - SDM DDS Curriculum Textbooks DVD

3) * Service Type Code
   Please select

   If you are unsure which service type code to use with your item, please contact Cindy Johannes at 645-8720.

4) Deposit Number

5) * First Name

6) * Last Name

7) * Street

   * City

   * State

   * Zip

   * Country

8) Email
   Email receipt to payer

9) * Description of Charge

10) * Amount $

11) Comments

12) Proceed to Credit Card Payment Form
1. Site Code, this is a default setting, but some departments work under different department codes and would need to select the appropriate code.
2. Select the UB Foundation account you want to receive payments
3. Select the Service Type for the transaction
4. Deposit Number for transaction (optional)
5. Enter Card Holder’s First Name *
6. Enter Card Holder’s Last Name *
7. Enter the billing address information.* This is required if your transaction includes New York State sales tax. New York State sales tax is a destination tax, therefore, the tax is calculated on the billing address. If you do not have the credit card address and the payment is not subject to New York State sales tax, enter your department/unit’s address.
8. If registrant requires email receipt (optional)
9. Enter Description of Charge (reunion admission, workshop fee etc…)
10. Enter Amount of Charge *
11. Enter any comments relating to the transaction (optional)
12. Proceed to Credit Card Payment Form

*This is the registrant’s information, if the registrant is the same as the card holder all of this information will pre-populate on the next screen. If the registrant is not the card holder, the card holder information can be completed on the next screen

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**Credit Card Payment Form:**

**Your Shopping Cart**

<table>
<thead>
<tr>
<th>Description</th>
<th>Price</th>
<th>Quantity</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>fee</td>
<td>20.00</td>
<td>1</td>
<td>$20.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td><strong>$20.00</strong></td>
</tr>
</tbody>
</table>
Payment Method *

[Image of payment methods]

Credit Card *

1) Name on Card
2) Credit Card Number
01 • Jan 3) / Expiration Month 2015 • Year 4) Security Code

1. Enter name as it appears on the credit card
2. Enter the credit card number without spaces or dashes
3. Enter credit card expiration date
4. Enter security code

Billing Information * 5)

First Name Last Name Street Address City

State / Province / Region Postal / Zip Code

United States Country Email Phone Number

Submit Payment of $20.00 6)

5. All Billing Information will pre-populate if the registrant is the same as the card holder. If the card holder information is different, update it here. Email and phone number are optional.

6. When you are ready to process, click on Submit Payment.

If your card is not processed, the errors are displayed at the top of the screen. If your card is approved, “this transaction has been approved” is displayed on the screen.

To process another transaction, click on Process Another Transaction.

If you are finished, exit.
Important Information

Black out all but the last 4 digits of the card number after processing.

In compliance with credit card company regulations, you must retain your credit card information in a secure location (locked) for at least 18 months from the date the transaction is processed. After which time it can be shredded.

Refunds and Voids –

Contact Leslie Schug at lschug@buffalo.edu to void a same day transaction or refund a previously processed payment. Please provide your confirmation receipt information. Include the transaction date, customer name, invoice number, refund amount, and a brief reason for the refund.

Typically, an online refund is processed the same day and debits the UBF account on the following day. However, the actual refund takes 5-10 business days to credit the card holder’s account (card holders can contact the bank that handles their account).

Reports
An email confirmation will automatically be sent to the individual processing the credit card. For a report of transactions processed, go to UBFirst, Reports, Checkout/UBFWIT Transactions. Complete the appropriate fields; be sure to use the correct UBIT username. Only those transaction processed by the user will be displayed.

If you have any questions, call or contact Cindy Johannes 645-8720 or devclj@buffalo.edu