

Universal Management Portal

User Guide

August 2017



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Contents

[Recent Revisions to This Document](#) 6

[About This Guide](#) 7

[Audience](#) 7

[Conventions](#) 7

Chapter 1 [Managing Merchants](#) 8

[Adding a New Merchant](#) 8

[Adding Merchant Information](#) 8

[Adding Processor Settings](#) 11

[Adding Product Settings](#) 11

[Virtual Terminal Merchant-Specific Information](#) 12

[Assigning and Configuring a Secure Acceptance Profile](#) 14

[Managing Merchants](#) 15

[Searching for Merchants](#) 15

[Changing Merchant Status](#) 15

[Sending Merchant Registration Email](#) 15

[Exporting Merchant List](#) 16

[Managing Merchant Information](#) 16

[Managing Processor Settings](#) 16

[Managing Product Settings](#) 17

[Merchant File Upload](#) 17

[Guidelines and Assumptions](#) 18

[Field Specifications](#) 19

[Response Status Codes](#) 23

[Error Codes](#) 23

[Specific Error Codes and Descriptions](#) 24

[Boarding Multiple Merchants](#) 27

[Updating Multiple Merchants](#) 28

[Downloading XML or CSV Detail Report](#) 28

[Searching for Mass Boarding Files](#) 28

Chapter 2	Managing Profiles	29
	Adding a Secure Acceptance Profile	30
	Configuring the Payment Settings	30
	Configuring the Payment Form	31
	Editing an In Progress Secure Acceptance Profile	31
	Editing a Promoted Secure Acceptance Profile	32
	Promoting an In Progress Secure Acceptance Profile	32
	Viewing Virtual Terminal Profiles	32
	Adding a Virtual Terminal Profile	33
	Default Values	33
	Customer Information	34
	Order Information	34
	Results Field	35
	Merchant-Specific Information	35
	Editing a Virtual Terminal Profile	37
	Configuring Payer Auth	37

Chapter 3	Managing Accounts	38
	Managing Users	38
	Adding a User	38
	Adding a Custom User	39
	Changing a User Role	39
	Changing User Status	39
	Unlocking Users	40
	Managing Your Profile	40
	Changing Your Password	40
	Updating Your Security Questions	41
	CyberSource Merchant Management Keys	41
	Creating Merchant Management Keys	41
	Deleting Merchant Management Keys	41

Chapter 4	Using Reports	42
	Using the Reports Dashboard	42
	Enabling Reporting Permissions	43
	Creating Report Subscriptions	43
	Editing Report Subscriptions	44
	Deleting Report Subscriptions	44
	Downloading Reports	44
	Migrating to Business Center Reports	45

What is Changing?	45
Field Changes	45
XML Report Header	46
CSV Report Header	47
XML Report Structure	47
XML Request Object	48

Recent Revisions to This Document

Release	Changes
August 2017	<ul style="list-style-type: none">■ Updated Reports with migration information to new Business Center Report platform.
October 2014	<ul style="list-style-type: none">■ Updated requirements for Merchant City field.
August 2014	<ul style="list-style-type: none">■ Added information on processors.■ Updated merchant boarding process.
July 2014	<ul style="list-style-type: none">■ Added Reports information.
January 2014	<ul style="list-style-type: none">■ Added Secure Acceptance information.
October 2013	<ul style="list-style-type: none">■ Added steps for creating a custom user.
September 2013	<ul style="list-style-type: none">■ Updated required fields for merchant information.■ Label for Transaction Cutoff Time changed to Cybs Batch Group.

About This Guide

Audience

This guide is intended for users of the Universal Management Portal.

Conventions



Note

A *Note* contains helpful suggestions or references to material not contained in the document.



Important

An *Important* statement contains information essential to successfully completing a task or learning a concept.



Warning

A *Warning* contains information or instructions, which, if not heeded, can result in a security risk, irreversible loss of data, or significant cost in time or revenue or both.

Managing Merchants

You can add merchants, search for merchants, and edit their information as necessary.

Adding a New Merchant

When you add a new merchant, you are required to enter the following information:

- Merchant information
- Processor settings
- Product settings

Adding Merchant Information

Step 1 From the Merchants drop-down menu, choose **Add Merchant**.

Step 2 Complete the required fields.

Table 1 Merchant Information Fields

Field	Description	Required/Optional
CyberSource Merchant ID	Merchant identifier.	Required.
Merchant Name	Merchant name.	Required. In addition to alphanumeric characters, the following special characters are allowed: space _ + - * " / ' & , () ! \$; : ? @ #
Country	Merchant country	Optional.
Address (line 1)	First line of merchant street address.	Required.
Address (line 2)	Second line of merchant street address.	Optional.
City	Merchant city.	Required.

Table 1 Merchant Information Fields (Continued)

Field	Description	Required/Optional
State/Province	Merchant state or province.	Required for addresses in USA, Canada, and Australia.
Zip/Postal Code	Merchant zip or postal code.	Required for addresses in USA, Canada, and Australia.
Phone	Merchant phone number.	Required.
Website URL	Merchant web site URL.	Required.
Time Zone	Merchant time zone.	Required.

Step 3 Enter the business contact information.

Table 2 Business Contact Information

Field	Description	Required/Optional
First Name	Business contact first name.	Required.
Last Name	Business contact last name.	Required.
Email	Business contact email. This address is used to the notify merchant of registration completion, merchant status change, and login instructions to the Business Center.	Required.
Phone Number	Business contact phone number.	Required. The plus sign (+) and 13 digits are allowed for international numbers.

Step 4 Enter the technical contact information. If this contact is the same as the business contact, check the **Use Business Contact** box.

Table 3 Technical Contact Information

Field	Description	Required/Optional
First Name	Technical contact first name.	Optional if business contact used. Otherwise, required.
Last Name	Technical contact last name.	Optional if business contact used. Otherwise, required.
Email	Technical contact email.	Optional if business contact used. Otherwise, required.

Table 3 Technical Contact Information (Continued)

Field	Description	Required/Optional
Phone Number	Technical contact phone number.	Optional if business contact used. Otherwise, required. The plus sign (+) and 13 digits are allowed for international numbers.

Step 5 Enter the emergency contact information. If this contact is the same as the business contact, check the **Use Business Contact** box.

Table 4 Emergency Contact Information

Field	Description	Required/Optional
First Name	Emergency contact first name.	Optional if business contact used. Otherwise, required.
Last Name	Emergency contact last name.	Optional if business contact used. Otherwise, required.
Email	Emergency contact email.	Optional if business contact used. Otherwise, required.
Phone Number	Emergency contact phone number.	Optional if business contact used. Otherwise, required. The plus sign (+) and 13 digits are allowed for international numbers.

Step 6 Click **Continue**.

The information you entered is saved and the Processor Settings page opens.

Adding Processor Settings

- Step 1** Select a processor from the drop-down list. If your processor is not listed, select **Skip this step**.
 - Step 2** Select the payment types accepted by the merchant.
 - Step 3** Select the accepted currencies and click the arrow button to move them to the Enabled column.
 - Step 4** Enter the Merchant ID (MID) and Terminal ID (TID) for each of the currencies accepted. Repeat this step for each accepted payment type.
 - Step 5** In the Extended Transaction Settings section, select or enter the necessary information.
 - Step 6** Under Additional Services, select 3D Secure if you want to enable this service for any or all of the accepted payment types.
 - Step 7** Under Configure 3D secure, select the cards that will be covered.
 - Step 8** Click **Continue**
The information you entered is saved and the Product Settings page opens.
-

Adding Product Settings

- Step 1** If the merchant will be using Virtual Terminal, check the **Virtual Terminal (VT)** box.
- Step 2** From the Settings Template drop-down menu, choose the template that the merchant will use.
The Virtual Terminal settings fields that are merchant specific need to be configured.
- Step 3** Select the card types that you have been authorized to accept by your merchant account provider. If displaying credit card information, it is required that you display at least one type of credit card. All selected card types will appear as payment options in the Virtual Terminal.
- Step 4** If you want to provide an email receipt, check the **Email Receipt to Customer** box.
- Step 5** If you want to provide a printable receipt, complete the Printable Receipt fields.
- Step 6** If you want to use one or more of the merchant-defined data fields to add other information to the order, complete the Merchant-Defined Data Fields section. If you need more than four fields, you can click on Additional Merchant-Defined Data Fields to add up to 20 fields.
- Step 7** Check the **I accept the Terms and Usage of Merchant-Defined Data Fields** box.
- Step 8** Click **Continue**.
The Review and Confirm Merchant Registration page opens.
- Step 9** Ensure that the information is correct. To correct or change any information, click **Edit** for that section.

Step 10 Click **Confirm and Save**.

The merchant is boarded and registration emails are sent to the merchant business contact with the business center login instructions.

Virtual Terminal Merchant-Specific Information

The following Virtual Terminal settings fields are merchant-specific.

Payment Information

You can choose which card types to display and accept in the Virtual Terminal. For example, if your merchant bank account supports only Visa and MasterCard, you can configure the Virtual Terminal to display only these card types.

For each card type that you choose in the first column, you can also choose to display (second column) or require (third column) the card verification number (CVN). The field appears in the order form below the card number in bold if you choose to require it or in normal type if you choose to only display it. If you use a card reader, you still need to enter the CVN manually because this number is not part of the information encoded in the card. The card verification number is a three- or four-digit number printed on the back or front of cards. This number ensures that your customer has physical possession of the card at the time of the order.

Printable Receipt

Complete this section to provide a printable receipt to your customers. You can use printable receipts for retail transactions and as packing information for the orders that you ship. Therefore, you can choose to provide the ability to print a single or a double receipt. You can use part of the double receipt format to give to your customer at the point of sale or as a packing slip when you ship goods.

**Important**

Telephone and email information is specific to each individual merchant and must be configured separately. Be sure to enter the information that you want to have appear on the receipt. This information will be printed in addition to the optional fields that you selected.

Email Receipt

Complete this section to email a receipt to your customers for card-not-present transactions. Check the box and enter the email address from which you want an email receipt sent by CyberSource to appear to originate.

Merchant-Defined Data Fields

You can use one or more of the merchant-defined data fields to add other information to the order, such as an order number, additional customer information, or a special comment or request from the customer.



Warning

Merchant-Defined Data fields are not intended to and **MUST NOT** be used to capture personally identifying information. Accordingly, Merchant is prohibited from capturing, obtaining, and/or transmitting any personally identifying information in or via the Merchant-Defined Data fields. Personally identifying information includes, but is not limited to, name, address, credit card number, social security number, driver's license number, state-issued identification number, passport number, and card verification numbers (CVV, CVC2, CVV2, CID, CVN). In the event CyberSource discovers that Merchant is capturing and/or transmitting personally identifying information via the Merchant-Defined Data fields, whether or not intentionally, CyberSource **WILL** immediately suspend Merchant's account, which will result in a rejection of any and all transaction requests submitted by Merchant after the point of suspension.

You can enter up to 64 characters in each field. As soon as you check one of the boxes, you are required to accept the terms for using the merchant-defined data fields. The link for the text and the check box are located at the bottom of the page next to the Submit button.



Important

Because no reminder of these rules exists in the Virtual Terminal, be sure that all users who place orders know about and follow the rules.

The label is the name of the field that you want to see in the Virtual Terminal. The default value is the value that automatically appears in the Virtual Terminal if you enter a value here. Whether or not you enter a value in the settings page, you can change the value that appears in the Virtual Terminal, for example:

Table 5 Merchant-Defined Field Example

Name	Default Value
Shipping	Standard

Note Although you are entering a default value in this field, you can change the value to another while you are processing a transaction in the Virtual Terminal.

If you check (at least) the Display box, complete any of the fields, and un-check the box, the data is disabled in the settings page and does not appear in the Virtual Terminal.

If you capture or void a transaction, the content of the merchant-defined field still appears in the Virtual Terminal, on the transaction confirmation and receipt, and on the transaction search detail page. You can use these fields with all card transactions available in the Virtual Terminal.

Assigning and Configuring a Secure Acceptance Profile

If a reseller has a Secure Acceptance profile, it can be assigned to the merchant either upon boarding or after the merchant has been boarded. Once a profile has been assigned, it can be configured specifically for that merchant.

-
- Step 1** If the merchant will be using Secure Acceptance, check the **Secure Acceptance (SA)** box.
- Step 2** Under Reseller's Active Profiles, select the Secure Acceptance profile you want to assign to the merchant and click the arrow button to move the profile to the Enabled Profiles list.
- Step 3** Click **Update**.
The name of the profile is now displayed below the two lists.
- Step 4** Click the edit icon next to the profile name to configure the profile for the merchant. A window opens, displaying the five sections that can be configured:
- General Settings
 - Payment Settings
 - Notifications
 - Customer Response



Note

For Silent Order Post (SOP) profiles, **Hosted by you** is required and is the only allowable option. **Customer Redirect Web Address** is also required. For Web/Mobile profiles, **Hosted by you** and **Hosted By CyberSource** are both available options. **Customer Redirect Web Address** is also required. Valid addresses must contain **http://**.

-
- Appearance & Branding
- Step 5** Complete the configuration for each section and click **Save**.
- Step 6** Click **Confirm and Save**.

Managing Merchants

You can search for merchants and edit their information as necessary.

Searching for Merchants

- Step 1** From the Merchants drop-down menu, choose **Manage Merchants**.
A search page opens.
 - Step 2** Choose a search option from the drop-down menu, and enter the search term in the text field.
 - Step 3** Click **Search**.
A list of merchants matching your search terms is returned.
-

Changing Merchant Status

- Step 1** From the Merchants drop-down menu, choose **Manage Merchants**.
 - Step 2** In the list of merchants, click the arrow next to the status for the merchant that you want to update.
 - Step 3** Choose the new status.
When switching a merchant to Live status, you have to enter a passphrase and click **Update Status**. An email notification that contains a link to the Business Center, login instructions, and a confirmation of the merchant status change is sent to the merchant's business contact. The merchant must know the passphrase in order to create the live user account in the business center.
-

Sending Merchant Registration Email

Only administrator users can re-send merchant details.

- Step 1** From the Merchants drop-down menu, choose **Manage Merchants**.
- Step 2** In the list of merchants, click the email icon next to the merchant to whom you want to send registration details.

A window opens, asking you to confirm the email address to which the information will be sent. The email contains a link to the Business Center and login instructions.

**Note**

If the merchant's status is Live, you must first enter a passphrase before the email is sent.

Step 3 Click **OK**.

Exporting Merchant List

Step 1 In the merchant list area, click **Export**.

Step 2 Click either Open or Save to view or download the CSV file.

Managing Merchant Information

Step 1 From the merchant search results, click the name of a merchant.

Step 2 On the Merchant Info tab, click **Edit**.

Step 3 Modify the information as necessary.

Step 4 Click **Save & Close**.

Managing Processor Settings

Step 1 From the merchant search results, click the name of a merchant.

Step 2 On the Processor Settings tab, click **Edit**.

Step 3 Modify the information as necessary.

Step 4 Click **Save & Close**.

Managing Product Settings

**Note**

When merchants log in to the Business Center, the Virtual Terminal settings are read-only. If changes are needed, please contact your reseller, who can edit the settings through the Universal Management Portal.

-
- Step 1** From the merchant search results, click the name of a merchant.
 - Step 2** On the Product Settings tab, click **Edit**.
 - Step 3** Modify the information as necessary.
 - Step 4** Click **Save & Close**.
-

Merchant File Upload

Mass merchant upload enables you to board or update multiple merchants using an XML or CSV file. You can also search for uploaded files and view file status reports. Only administrator users can use the merchant file upload feature. Use the following links to download the complete XSD or CSV files:

http://apps.cybersource.com/library/documentation/dev_guides/Universal_Management_Portal/MerchantCommonServiceType.xsd

http://apps.cybersource.com/library/documentation/dev_guides/Universal_Management_Portal/MerchantBoardingTemplate.csv

http://apps.cybersource.com/library/documentation/dev_guides/Universal_Management_Portal/CyberSourceThroughVisaNet.xsd

Guidelines and Assumptions

- 1 XML and CSV are the supported file formats.
- 2 The XML file should conform to the XSDs.
- 3 The CSV file should conform to the CSV template.
- 4 Boarding Request ID is a unique identifier and is required in each file.
- 5 The file should contain a unique merchant ID for each merchant to be boarded.
- 6 At least one board merchant or update merchant request is required in the file.
- 7 The update request submitted should have all relevant entity level details populated to update the entity information successfully.
- 8 The Organization ID, Batch Group, and Processor Name information will be provided by CyberSource, as these are specific for each Reseller.

Field Specifications

N = Numeric

A = Alphanumeric

Table 6 Field Specifications

Field Name	Field Description	Field Length/Data Type	Required/Optional
organizationId	OrganizationID/ ResellerID as assigned by CyberSource for the reseller	AN	Required
boardingRequestId	Unique request ID for the service request.	8-36AN	Required
merchantId	Merchant Identifier	6-30AN	Required
name	Merchant Name	25AN	Required. In addition to alphanumeric characters, the following special characters are allowed: space _ + . - * " / ' & , () ! \$; : ? @ #
emailAddress	Merchant Email Address	30AN	Optional
phone	Merchant Phone	14AN	Required -Phone is allowed for 13 digits, can also accept plus (+) for international along with 13 digits.
Time Zone	Merchant Time Zone	N	Optional
websiteUrl	Merchant Web Site URL	100AN	Optional
firstName	Contact First Name	50AN	Optional (Business Contact is used)
lastName	Contact Last Name	50AN	Optional (Business Contact is used)
emailAddress	Contact Email	50AN	Optional (Business Contact is used)

Table 6 Field Specifications (Continued)

Field Name	Field Description	Field Length/Data Type	Required/Optional
Phone	Contact Phone	14AN	Optional (Business Contact is used). Phone is allowed for 13 digits, can also accept plus (+) for international along with 13 digits.
processorName	This is provided by CyberSource. Name of the Processor that is being used by the Reseller / Organization.	AN	Required
acquirerCountryCode	Code that identifies the country of the acquiring institution for the merchant. This field is used in all messages related to a customer transaction. The value used in the original transaction must be used in any subsequent messages, including responses.	3N	Required
acquirerFileDestinationBin	BIN (Bank Identification Number) to which the capture file is sent.	6N	Required
acquirerIca	MasterCard assigned BIN for the acquirer.	6N	Optional
acquiringInstitutionId	BIN of the merchant's acquiring financial institution.	11N (Visa assigned BIN values are 6N in length. The maximum length supported by the spec is 11)	Required

Table 6 Field Specifications (Continued)

Field Name	Field Description	Field Length/Data Type	Required/Optional
acquiringDiscoverInstitutionId	Acquiring Discover Institution ID	11N (Visa assigned BIN values are 6N in length. The maximum length supported by the spec is 11)	Optional - Required for a few processors when Discover Card is selected.
categoryCode	Four-digit code that indicates merchant's type of product or service.	4N	Required
standardIndustryCode	Four-digit code that indicates merchant's type of product or service.	4N	Optional
directConnectProgram	Direct Connect Program	AN	Optional (default->02_DC)
batchGroup	Defines the transaction cutoff time and batch file delivery time for processing batch payment files for payment gateways.	AN	Optional. The batch group value will be provided by CyberSource.
airlineDataEnabled	When enabled, allows merchant to accept airline data in transactions.	Enabled/ Disabled/ Ignored	Optional
quasiCashEnabled	When enabled, allows merchant to process quasi-cash transactions.	true/false	Optional
partialAuthEnabled	When enabled, allows merchant to send partial authorization transactions.	true/false	Optional
interchangeOptimization Enabled	When enabled, ensures the best rate possible for the merchant's transactions.	true/false	Optional

Table 6 Field Specifications (Continued)

Field Name	Field Description	Field Length/Data Type	Required/Optional
verificationValue	Ten-digit number that identifies merchant participating in Select Merchant Fee (SMF) programs. This number is unique to each merchant.	10N	Optional
splitShipmentEnabled	When enabled, allows merchant to split an order into multiple shipments with multiple captures.	true/false	Optional
transactionRefNumber Enabled	Transaction Reference Number required for transactions.	true/false	Optional
paymentType	Payment card types supported by CyberSource Through VisaNet Processors - VISA, MasterCard, JCB, Discover, American Express, Diners Club.	N	Required
currencyCode	Currency code combination with paymentType	N	Required
processorValue	Processor Merchant IDs	15 AN	Required
paymentType	Payment card types supported by CyberSource Through VisaNet Processors - VISA, MasterCard, JCB, Discover, American Express, and Diners Club.	N	Required
currencyCode	Currency code combination with paymentType	N	Required
processorValue	Processor Terminal IDs	8	AN Required
type	Product Type	N	Required - Currently, it is Virtual_Terminal.

Table 6 Field Specifications (Continued)

Field Name	Field Description	Field Length/Data Type	Required/Optional
profileId	Profile ID that was registered with UMP application.	AN	Required
profileName	Profile Name	5-100AN	Required
profileDescription	Profile Description	5-250AN	Required
addressLine1	First line of merchant street address.	60AN	Required
addressLine2	Second line of merchant street address.	60AN	Optional
City	Merchant City	25AN	Required
State/Province	Merchant State or Province	AN	Conditional (required for USA, Canada, and Australia)
postalOrZipCode	Merchant Postal or Zip code	14AN	Conditional (required for USA, Canada, and Australia)
Country	Merchant Country	N	Required

Response Status Codes

The table below contains specific response status codes and their descriptions.

Table 7 Response Status Codes

Message	Description
Failed	An error occurred while processing the request.
In Progress	Request processing is in progress.
Partial Success	Some of the merchants in the request were processed but others had errors.
Pending	The request is pending due to an issue and will continue after some time.
Successful	The request was successfully processed.

Error Codes

When failures occur during request processing, the response XML provides the information necessary in order to explain the cause of the failure, including the error code and error description.

An error code range is defined based on components like errors in the merchant information, processor information, user details, product settings, and admin and contact details. Each component maps to a different range of error codes.

System- and database-related errors are included in a different range.

Table 8 Error Code Ranges

Error Code Range	Error Description
E1001 - E2000	Errors in the merchant information.
E2001 - E3000	Errors in the merchant contact and administrator information.
E3001 - E4000	Errors in the processor information.
E4001 - E5000	Errors in the product settings information.
E5001 - E6000	System and database errors.

Specific Error Codes and Descriptions

The table below contains specific error codes and their descriptions.

Table 9 Error Codes

Error Code	Description
E1001	Merchant Name is required.
E1002	Merchant Name can accept alphanumeric characters, spaces, and some special characters.
E1003	Merchant Name cannot exceed 25 characters.
E1004	Merchant Address is required.
E1005	Merchant Address can accept only alphanumeric characters and spaces.
E1006	Merchant Address cannot exceed 60 characters.
E1007	Merchant Address 2 can accept only alphanumeric characters and spaces.
E1008	Merchant Address 2 cannot exceed 60 characters.
E1009	Merchant City is required.
E1010	Merchant City can accept only alphanumeric characters and spaces.
E1011	Merchant City cannot exceed 13 characters.
E1012	Merchant State or Province can contain only alphanumeric characters.
E1013	Merchant State specified is not present in the allowed US states list.
E1014	Merchant Postal Code does not meet the postal code standard of the specified country.
E1015	Merchant Country is required.
E1016	Merchant Country can contain only alphanumeric characters.
E1017	Merchant Country is three characters.
E1018	Merchant Country specified is not present in the allowed countries list.

Table 9 Error Codes (Continued)

Error Code	Description
E1019	Merchant Phone Number is required.
E1020	Merchant Phone Number does not meet the phone number standard.
E1021	Merchant email address is not in the correct format.
E1022	Merchant email address cannot exceed 30 characters.
E1023	Merchant Time Zone is required.
E1024	Merchant Time Zone is not present in the allowable time zone list.
E1025	Merchant ID <value> is already in use.
E1026	Account ID <value> is already in use.
E1027	Merchant ID format is invalid: <value>
E1028	Merchant ID <value> not found.
E1029	Merchant is already activated.
E1030	Company configuration already exists for profile <value>.
E1031	Merchant mapping already exists for platform <value>.
E1032	Attempted to add a duplicate merchant profile using profileId <value>.
E1033	Merchant URL is invalid.
E1034	Merchant URL cannot exceed 13 characters.
E1035	Invalid merchant status.
E1036	Invalid transition of Merchant status from <value> to <value>.
E1037	System Error while performing update for merchant information.
E1038	Merchant ID is required.
E1039	Merchant ID cannot exceed 30 characters.
E1040	Merchant ID can contain only alphanumeric characters and underscores.
E1041	Merchant ID not found.
E1042	Boarding Request ID is required.
E1043	Boarding Request ID must be between eight and 36 characters.
E1044	Boarding Request ID can contain only alphanumeric characters and hyphen.
E2001	Contact First Name is required.
E2002	Contact First Name cannot exceed 50 characters.
E2003	Contact Last Name is required.
E2004	Contact Last Name must be between two and 50 characters.
E2005	Contact Email Address is required.
E2006	Contact Email Address is not in the correct format.
E2007	Contact Email cannot exceed 100 characters.
E2008	Contact Phone Number is required.
E2009	Contact Phone Number does not meet the phone number standard.

Table 9 Error Codes (Continued)

Error Code	Description
E2010	Business information was not found for profile <value>.
E2011	Company configuration already exists for profile <value>.
E2012	System Error while performing update for contact information.
E2013	Business contact information is required.
E3001	<value> is not a valid attribute name for processor <value>.
E3002	<value> is not a valid processor name.
E3003	The processor type <value> is not a supported processor for the <value> gateway platform.
E3004	The solution type <value> is not supported in this context.
E3005	Merchant ID <value> was not boarded with solution type <value>.
E3006	More than one active processor has been specified for merchant ID <value>.
E3007	<value> processor configuration already exists for profile <value>.
E3008	Processor configuration was not found for profile <value>.
E3009	Multiple configurations for processor <value> are not supported.
E3010	<value> is not a valid attribute name for a miscellaneous configuration item.
E3011	Invalid currency code.
E3012	Invalid payment type.
E3013	Processor Name is required.
E3014	Processor Name is not valid.
E3015	At least one merchant ID is required for a Visa payment type.
E3016	At least one merchant ID is required for a Visa payment type.
E3017	Merchant ID for <value> currency with payment type <value> should have a minimum of 2 characters.
E3018	Merchant ID for <value> currency with payment type <value> cannot exceed <value> characters.
E3019	Merchant ID for <value> currency with payment type <value> can contain only alphanumeric characters.
E3020	Terminal ID for <value> currency with payment type <value> should have a minimum of two characters.
E3021	Terminal ID for <value> currency with payment type <value> cannot exceed <value> characters.
E3022	Terminal ID for <value> currency with payment type <value> can contain only alphanumeric characters.
E3023	<value> is a required field.
E3024	Not a valid value for field <value>.
E3025	<value> can contain only numbers.
E3026	<value> can contain only alphanumeric characters.

Table 9 Error Codes (Continued)

Error Code	Description
E3027	<value> cannot exceed 1 characters.
E3028	<value> should have a minimum of 1 character(s).
E3029	System Error while performing update for processor information.
E4001	Profile Name is required.
E4002	Profile Name cannot exceed 100 characters.
E4003	Profile Name does not exist.
E4004	Profile Description cannot exceed 250 characters.
E4005	System Error while performing update for products.
E5001	Database error updating <value> with <value>.
E5002	Account Boarding on Cybs failed for Profile ID <value> using Account ID <value>.
E5003	Merchant Boarding on Cybs failed for Profile ID <value> using Merchant ID <value>.
E5004	Merchant Activation on Cybs failed for Profile ID <value> using Merchant ID <value>.
E5005	Generic System Error during merchant update.
E7001	Invalid request identifier in the URL. Verify and resubmit the request.
E7002	Request is being processed. Check back later.
E7003	Duplicate boarding request Id. Correct and submit the request again.
E7004	Request does not contain xml payload. Correct and submit the request again.

Boarding Multiple Merchants

XML and CSV are the supported file formats for the file upload.

-
- Step 1** From the Merchants drop-down menu, choose **Merchant File Upload**.
 - Step 2** On the Upload Files tab, click **Browse**.
 - Step 3** Navigate to the merchant file.
 - Step 4** Click **Upload**.

The file is uploaded. The upload status of the file appears in the File Upload History table.

Updating Multiple Merchants

XML and CSV are the supported file formats for the file upload.

Step 1 From the Merchants drop-down menu, choose **Merchant File Upload**.

Step 2 On the Upload Files tab, click **Browse**.

Step 3 Navigate to the merchant file.

Step 4 Click **Upload**.

The file is uploaded. The upload status of the file appears in the File Upload History table.

Downloading XML or CSV Detail Report

Step 1 From the Merchants drop-down menu, choose **Merchant File Upload**.

Step 2 In the File Upload History table, click the link for the detail report that you want to download.



Note

The Detail Report can also be downloaded from the Search Results on the Find Files tab.

Searching for Mass Boarding Files

Step 1 From the Merchants drop-down menu, choose **Merchant File Upload**.

Step 2 On the Find Files tab, enter your search criteria. You can search by Boarding Request ID, File Status, Uploaded By, and Upload Date.

Step 3 Click **Search**.

The file(s) matching your search criteria are displayed in the Search Results.

Managing Profiles

You can view your existing Virtual Terminal and Secure Acceptance profiles and create new profiles for your merchants.

A Secure Acceptance profile consists of settings that you configure to create a customer checkout experience. You can create and edit multiple profiles, each offering a custom checkout experience.

The Virtual Terminal always requires that you display at least one type of card. The minimum required information for retail transactions comprises card information (except for the card verification number), amount and currency, transaction source and type, and customer name.

To display a field in the Virtual Terminal, click **Display**. As soon as you do so, the other options (Require and Receipt) are enabled. To require users to complete a field, click **Require**; the field becomes highlighted in the Virtual Terminal. To add a field to the transaction receipt, click **Receipt**. You can add any field that is displayed; fields do not need to be required in order to appear on the receipt.



When merchants log in to the Business Center, the Virtual Terminal settings are read-only. Any changes to the Virtual Terminal settings will need to be managed by the reseller, who can edit the settings through the Universal Management Portal.

Adding a Secure Acceptance Profile

There are three parts to the Secure Acceptance profile:

- General Settings
- Payment Settings
- Payment Form

-
- Step 1** From the Profiles drop-down menu, choose **Add Profile > Secure Acceptance Profile**.
- Step 2** Enter a profile name. The profile name is required and cannot exceed 20 alphanumeric characters.
- Step 3** Enter a profile description. The description cannot exceed 255 characters.
- Step 4** Check Web/Mobile or Silent Order Post.



Note

Once a profile is created as either Web/Mobile or Silent Order Post, it cannot be changed to the other.

-
- Step 5** If you want to enable Payment Tokenization or Decision Manager, check the boxes under Added Values Services. If you select Decision Manager, you have the option of also enabling Verbose Data.



Note

Selecting one or more of these options only enables them if they are already turned on and configured in the Business Center. For detailed information about Payment Tokenization, see [Payment Tokenization Using the Business Center](#). For detailed information about Decision Manager, see [Fraud Management](#).

Configuring the Payment Settings

If a transaction fails to return an Address Verification System (AVS) or a Card Verification Number (CVN) match, you can choose to perform an automatic authorization reversal on the transaction.

-
- Step 1** Check **Fails AVS check**. An automatic authorization reversal is performed on a transaction that fails an AVS check.
- Step 2** Check **Fails CVN check**. An automatic authorization reversal is performed on a transaction that fails a CVN check.
-

Configuring the Payment Form

The payment form is the consumer's checkout experience. It consists of a series of windows in which the consumer enters or reviews information before submitting a transaction. Select the fields you want displayed on each screen of the checkout process: billing, shipping, payment, and order review. The consumer enters or reviews information in the order.

-
- Step 1** Check **Display the total tax amount in each step of the checkout process**. It is required that the total tax amount be included in each transaction.
- Step 2** Check the billing information fields to be included. The options for each field are:
- Display — the consumer can view the information contained in this field.
 - Edit — the consumer can view and edit the information contained in this field.
 - Require — the consumer is required to enter information in this field to submit the transaction. When you select this option, all other options are automatically selected.
- Step 3** To display and edit shipping information fields, check **Shipping Information**.
- Step 4** Check the shipping information fields to be included. The options for each field are:
- Display — the consumer can view the information contained in this field.
 - Edit — the consumer can view and edit the information contained in this field.
 - Require — the consumer is required to enter information in this field to submit the transaction. When you select this option, all other options are automatically selected.
- Step 5** Check the fields you want displayed on the Order Review page. The options for each field are:
- Display — the consumer can view the information contained in this field.
 - Edit — the consumer can view and edit the information contained in this field.
- Step 6** Click **Save** to save the profile for promoting at a later time or **Promote** to save the profile and make it active.
-

Editing an In Progress Secure Acceptance Profile

-
- Step 1** From the Profiles drop-down menu, choose **Manage Profiles**.
- Step 2** Click the **Secure Acceptance** tab.
- Step 3** In the list of In Progress profiles, click the edit icon next to the profile you want to edit.
- Step 4** Click **Edit**.
- Step 5** Make the necessary changes to the profile.

Step 6 Click **Save** or **Promote**.



Note

If merchants are associated with a completed profile that is promoted, those merchants will automatically receive the updated profile. A caution message appears as you promote a completed profile.

Editing a Promoted Secure Acceptance Profile

Step 1 From the Profiles drop-down menu, choose **Manage Profiles**.

Step 2 Click the **Secure Acceptance** tab.

Step 3 In the list of Completed profiles, click the edit icon next to the profile you want to edit.

Step 4 Click **Open Editable Version**.

A message opens explaining that a copy of the existing profile will be used for editing.

Step 5 Click **Continue**.

Step 6 Make the necessary changes to the profile.

Step 7 Click **Save** or **Promote**.

Promoting an In Progress Secure Acceptance Profile

Step 1 From the Profiles drop-down menu, choose **Manage Profiles**.

Step 2 Click the **Secure Acceptance** tab.

Step 3 In the list of Completed profiles, click **Promote** next to the profile you want to move to completed status.

Viewing Virtual Terminal Profiles

Choose **Profiles > Manage Profiles** to view virtual terminal profiles created for use by merchants. To view the details of a profile, click the **View** icon next to each profile.

Adding a Virtual Terminal Profile

- Step 1** From the Profiles drop-down menu, choose **Add Profile > Virtual Terminal Profile**.
- Step 2** Enter a profile name.
- Step 3** Enter a profile description.
- Step 4** Complete the remaining profile information as necessary.
- Step 5** Click **Create**.

See the sections below for field-specific information for each profile area. The Virtual Terminal profile is added and available for use by merchants.

Default Values

Table 10 Fields for Default Values

Field	Description
Country	Default country for virtual terminal transactions.
Currency	Default currency for virtual terminal transactions.
Transaction Type	Default transaction type for virtual terminal transactions. Options are: <ul style="list-style-type: none"> ■ Authorization: You request an authorization when a customer makes a purchase. An authorization ensures that your customer's card account is open, is in good standing, and has funds available to complete the purchase. This option is the default. ■ Sale: A sale authorizes the card and captures the authorization. Card associations require that you choose Sale only if you fulfill the order immediately, for example, for purchases at a retail store. For online orders, you must ship the goods before you capture the funds.
Payment Type	Default payment type for virtual terminal transactions.

Customer Information



Note

Displaying a field on the order form is sufficient to ensure that the field appears on the receipt, but the field must contain a value. You do not need to require it.

Table 11 Customer Information Fields

Field	Description
Customer ID	Customer ID number.
Company	Company name of customer.
Phone Number	Customer phone number.
Email Address	Customer email address.

Order Information

Table 12 Order Information Fields

Field	Description
Order Number and Merchant Reference Number	The order number is the same as the merchant reference number, which is a unique identifier that you create for the order.
Comment	Use the comment field for a brief description of the order or any comment that you wish to add to the order. Comments that users add to the order form appear on the settlement page (where they can be modified) and in the search details page.
Shipping Address	Generally, the shipping information is required only when it differs from the billing information.
Merchant Descriptor	Merchant description that appears on the cardholder's statement. This field is not available for all processors.
Merchant Contact Phone Number	Merchant contact information, such as a phone number, that appears on the cardholder's statement. This field is not available for all processors.

Results Field

In addition to the order fields that you can add to the receipt, you can add these results fields to further help you in reconciling your transactions or to keep track of statistics. These results are returned only for payment card transactions.

Table 13 Results Fields

Field	Description
AVS Result	Gives the abbreviated definition of the address verification result for the transaction.
Auth Code	Gives the 6-digit authorization code received for the card transaction.

Printable Receipt

Complete this section to provide a printable receipt to your customers. You can use printable receipts for retail transactions and as packing information for the orders that you ship. Therefore, you can choose to provide the ability to print a single or a double receipt. You can use part of the double receipt format to give to your customer at the point of sale or as a packing slip when you ship goods.



Important

Telephone and email information is specific to each individual merchant and must be configured separately. Be sure to enter the information that you want to have appear on the receipt. This information will be printed in addition to the optional fields that you selected.

Merchant-Specific Information

The following VT settings fields are merchant-specific and need to be configured during merchant boarding. These fields can be modified when editing the product settings for a merchant.

Payment Information

You can choose which card types to display and accept in the Virtual Terminal. For example, if your merchant bank account supports only Visa and MasterCard, you can configure the Virtual Terminal to display only these card types.

For each card type that you choose in the first column, you can also choose to display (second column) or require (third column) the card verification number (CVN). The field appears in the order form below the card number in bold if you choose to require it or in normal type if you choose to only display it. If you use a card reader, you still need to enter the CVN manually because this number is not part of the information encoded in the card. The card verification number is a three- or four-digit number printed on the back or front of cards. This number ensures that your customer has physical possession of the card at the time of the order.

Email Receipt

Complete this section to email a receipt to your customers for card-not-present transactions. Check the box and enter the email address from which you want an email receipt sent by CyberSource to appear to originate.

Merchant-Defined Data Fields

You can use one or more of the merchant-defined data fields to add other information to the order, such as an order number, additional customer information, or a special comment or request from the customer.



Merchant-Defined Data fields are not intended to and **MUST NOT** be used to capture personally identifying information. Accordingly, Merchant is prohibited from capturing, obtaining, and/or transmitting any personally identifying information in or via the Merchant-Defined Data fields. Personally identifying information includes, but is not limited to, name, address, credit card number, social security number, driver's license number, state-issued identification number, passport number, and card verification numbers (CVV, CVC2, CVV2, CID, CVN). In the event CyberSource discovers that Merchant is capturing and/or transmitting personally identifying information via the Merchant-Defined Data fields, whether or not intentionally, CyberSource **WILL** immediately suspend Merchant's account, which will result in a rejection of any and all transaction requests submitted by Merchant after the point of suspension.

You can enter up to 64 characters in each field. As soon as you check one of the boxes, you are required to accept the terms for using the merchant-defined data fields. The link for the text and the check box are located at the bottom of the page next to the Submit button.



Because no reminder of these rules exists in the Virtual Terminal, be sure that all users who place orders know about and follow the rules.

The label is the name of the field that you want to see in the Virtual Terminal. The default value is the value that automatically appears in the Virtual Terminal if you enter a value here. Whether or not you enter a value in the settings page, you can change the value that appears in the Virtual Terminal, for example:

Table 15 Merchant-Defined Field Example

Name	Default Value
Shipping	Standard

Note Although you are entering a default value in this field, you can change the value to another while you are processing a transaction in the Virtual Terminal.

If you check (at least) the Display box, complete any of the fields, and un-check the box, the data is disabled in the settings page and does not appear in the Virtual Terminal.

If you capture or void a transaction, the content of the merchant-defined field still appears in the Virtual Terminal, on the transaction confirmation and receipt, and on the transaction search detail page. You can use these fields with all card transactions available in the Virtual Terminal.

Editing a Virtual Terminal Profile

-
- Step 1** From the Profiles drop-down menu, choose **Manage Profiles**.
 - Step 2** Next to the name of the profile you want to edit, click the pencil icon.
 - Step 3** Click **Edit**.
 - Step 4** Edit the profile information as necessary.
 - Step 5** Click **Save**.
-

Configuring Payer Auth

Payer Auth enables you to enter your acquirer identification numbers for your accepted payment types.

-
- Step 1** From the Reseller Tools drop-down menu, choose **Payer Auth Configuration**.
 - Step 2** Enter the Acquirer Identification Numbers for the listed card schemes.
 - Step 3** Click **Save**.
-

Managing Accounts

You can manage and add users, manage your user profile, and change your security questions.

Managing Users

You can add users, change their roles, and disable or enable individual users. User management functionality is available only to administrator users.

There are three groups of users:

- Administrators can register a merchant, add a product profile, manage users, update their own profiles, generate CyberSource Merchant Management keys, mass upload merchants, and re-send the merchant registration details email with Business Center login instructions.
- Users can register a merchant, add a product profile, and update their own profiles.
- Custom users can register a merchant, update their own profiles, and view Virtual Terminal settings. These users can also be given Virtual Terminal management permissions, which enables them to add and manage product profiles and settings.

Adding a User

- Step 1** From the navigation menu, choose **Account > User Management > Add User**.
- Step 2** Enter the required user information.
- Step 3** Choose a role for the user.
- Step 4** Click **Send**.

An email with registration information is sent to the user at the provided email address. The user must follow the link in the registration email to set up a username and password. When that is complete, he or she is added to the account. The email is valid for 24 hours.

Adding a Custom User

- Step 1** From the navigation menu, choose **Account > User Management > Add User**.
- Step 2** Enter the required user information.
- Step 3** From the Role drop-down menu, choose **Custom**.
The Custom Role Permissions - Virtual Terminal and Secure Acceptance areas appear. By default, View permissions are already enabled.
- Step 4** If you want the user to have Virtual Terminal and/or Secure Acceptance management permissions, check the **Manage** box.
- Step 5** Click **Send Activation Email**.
An email with registration information is sent to the user at the provided email address. The user must follow the link in the registration email to set up a username and password. Once that is complete, they are added to the account. The email is valid for 24 hours.
-

Changing a User Role

- Step 1** From the navigation menu, choose **Account > User Management > Manage Users**.
- Step 2** Click the username of the user whose role you want modify.
- Step 3** Choose a role for the user.
- Step 4** Click **Update**.
-

Changing User Status

- Step 1** From the navigation menu, choose **Account > User Management > Manage Users**.
- Step 2** Click the username of the user whose status you want modify.
- Step 3** Choose a status for the user.
- Step 4** Click **Update**.
-

Unlocking Users

- Step 1** Log in as an administrator.
 - Step 2** From the navigation menu, choose **Account > User Management > Manage Users**.
 - Step 3** Click the username of the user you want to unlock.
The user's information is displayed.
 - Step 4** Check **Unlock**.
 - Step 5** Click **Update**.
An email is sent to the user with instructions for resetting the password.
-

Managing Your Profile

Profile management enables you to change your password and update your security questions.

Changing Your Password

- Step 1** From the navigation menu, choose **Account > My Profile > Change My Password**.
 - Step 2** Enter your current password.
 - Step 3** Enter your new password.
 - Step 4** Re-enter your new password.
 - Step 5** Click **Save**.
-

Updating Your Security Questions

There are five security questions that you are required to set up when you create your account. These questions are used if you need to retrieve your login information.

-
- Step 1** From the navigation menu, choose **Account > My Profile > Update My Security Questions**.
 - Step 2** Select a security question from the drop-down menu.
 - Step 3** Enter your answer.
 - Step 4** Repeat Steps 2 and 3 for the remaining security questions.
 - Step 5** Click **Update**.
-

CyberSource Merchant Management Keys

This page shows a list of active CyberSource Merchant Management (CMM) Keys that you can use with the Boarding and Configuration API to authenticate the requests. The Boarding and Configuration API uses a PKCS12 key file with the .p12 extension to digitally sign your request before transmitting it to CyberSource. Only administrator users can generate CMM keys.

Creating Merchant Management Keys

-
- Step 1** From the navigation menu, choose **Account > CMM Keys**.
 - Step 2** Click **Start Key Creation**.
 - Step 3** On the **Generate and Save Key** page, click **Generate Certificate Request**.
 - Step 4** When prompted, save the generated security key.
-

Deleting Merchant Management Keys

-
- Step 1** From the navigation menu, choose **Account > CMM Keys**.
 - Step 2** Check the check boxes next to the keys you want to delete.
 - Step 3** Click **Delete**.
-

Using Reports

Using the Reports Dashboard

The Dashboard tab enables the user to see and interact with the dashboard reports. Information on the dashboard is shown only in UTC time zone. Administrators and users with report view permissions can view the dashboard.

The Summary section provides the user with a snapshot of their portfolio's activity for the selected time period. The Chart section provides a more detailed breakdown of transaction data for the time period selected.

To change the information in the charts and graphs:

- Click the **Date Range** drop-down menu and select different dates.
- Use the **Select Currency** to change the currency shown in the summary.
- If you want to view the currency next to the transaction counts, select **Show detailed authorized/settled amounts**.

To view the data elements that make up a chart:

- Hover your mouse over the chart or graph.
- Click on the label of a data element below the chart to remove it.

To view report data in table form:

- Step 1** Click the table icon. This opens a table showing the report data, arranged by Merchant ID. You can sort the table by clicking on the column name.
- Step 2** If you want to export the table, click one of the format links.
-

To export data:

- Hover over the export icon and select a format. Your options are:
 - XML
 - CSV
 - JSON
-

Enabling Reporting Permissions

Only administrator users can enable reporting permissions for other users. By default, administrators have report download and create permissions.

To enable report permissions:

- Step 1** Click **User Management > Manage User**.
 - Step 2** Click the edit icon next to the user you want to give reporting permissions to.
 - Step 3** From the role drop-down menu, select **Custom**.
 - Step 4** Under Report Settings you can select View, Edit, and Download. Select the permissions that are correct for your specific user.
 - View: Enables the user to see the Dashboards tab and all the information associated with it.
 - Edit: Enables the user to create and edit detail report subscriptions and the information included in those reports.
 - Download: Enables the user to download the information from the detail reports in a CSV or XML format.
-

Creating Report Subscriptions

Administrators and users with report edit permissions can create report subscriptions. The Report Subscriptions tab is not visible to users without edit permissions.



Beginning in August 2017, UMP reports will migrate to the Business Center. You can continue to view and download reports, but you will not be able to edit reports or create new reports in UMP. See "[Migrating to Business Center Reports](#)," page 45 for more information.

Editing Report Subscriptions

Administrators and users with report edit permissions can edit report subscriptions.



Important

Beginning in August 2017, UMP reports will migrate to the Business Center. You can continue to view and download reports, but you will not be able to edit reports or create new reports in UMP. See "[Migrating to Business Center Reports](#)," [page 45](#) for more information.

Deleting Report Subscriptions

Administrators and users with report edit permissions can delete report subscriptions.



Important

Beginning in August 2017, UMP reports will migrate to the Business Center. You can continue to view and download reports, but you will not be able to edit reports or create new reports in UMP. See "[Migrating to Business Center Reports](#)," [page 45](#) for more information.

Downloading Reports

Administrators and users with report download permissions can download reports.

To download a report:

- Step 1** Click **Reports > Report Search**.
 - Step 2** Click on the CSV or XML link to download the report.
-

Migrating to Business Center Reports

In August 2017, reports are migrating to the Business Center. User permissions will remain the same as they are in UMP. Your existing report subscriptions will be moved and the report names will be appended with `_portfolio`. For example, if you have a report named `TransactionRequests` in UMP, the name in the Business Center will be `TransactionRequests_portfolio`. The fields, field order (for CSV), and frequency will not change during this migration.

You can use the Business Center to create new reports, edit reports that were migrated, and download reports. For more information on using Business Center Reports, see [Business Center Reporting Developer Guide](#).

What is Changing?

You will see some minor changes to reports after the migration. These changes include:

- Renamed/removed fields
- Changes to the XML report header
- Changes to the CSV report header
- Changes to the XML report structure
- Changes to the XML report request object

Field Changes

Some fields in UMP have been renamed or removed.

Table 16 Field Name Changes

UMP Field Name	Business Center Field Name
ShipTo_FirstNameCity	ShipTo_City
ShipTo_FirstNameState	ShipTo_State
ShipTo_FirstNameZip	ShipTo_Zip
ShipTo_FirstNameCountry	ShipTo_Country
ShipTo_FirstNameLastName	ShipTo_LastName
ErrorCategory	ExceptionCategory
ErrorMessage	ExceptionMessage
ReasonCode	ExceptionReasonCode
Exception_ProcessorResponseCode	ProcessorResponseCode

Table 17 Removed Fields

UMP Field Name
SettlementProcessor
Processor#

XML Report Header

The XML report header now contains the “type” attribute that defines the report type that is being downloaded.

Example Old CSV Report Header

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE Report SYSTEM "https://ebctest.cybersource.com/ebctest/
reports/dtd/ctdr_1_1.dtd">
<Report
ReportEndDate="2017-04-08T23:59:59Z"
ReportStartDate="2017-04-08T00:00:00Z"
OrganizationID="orgid"
xmlns="https://ebctest.cybersource.com/ebctest/reports/dtd/ctdr_1_
1.dtd"
Version="1.0"
Name="OldTransactionRequestJuly12th_XML">
```

Example New CSV Report Header

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE Report SYSTEM "https://ebctest.cybersource.com/ebctest/
reports/dtd/ctdr_1_1.dtd">
<Report
ReportEndDate="2017-04-08T23:59:59Z"
ReportStartDate="2017-04-08T00:00:00Z"
OrganizationID="orgid"
xmlns="https://ebctest.cybersource.com/ebctest/reports/dtd/ctdr_1_
1.dtd"
Version="1.0"
Type="TransactionRequestReport"
Name="OldTransactionRequestJuly12th_XML">
```

CSV Report Header

The CSV report header now contains the “type” field that defines the report type that is being downloaded.

Example Old CSV Report Header

```
orgID TransactionRequestReportJuly12th_CSV 1.6 2017-04-08T00:00:00Z to
2017-04-08T23:59:59Z
```

Example New CSV Report Header

```
orgID TransactionRequestReportJuly12th_CSV TransactionRequestReport 1.6
2017-04-08T00:00:00Z to 2017-04-08T23:59:59Z
```

XML Report Structure

The XML report structure has been changed to reflect the migration to Business Center reporting. <PaymentInfo> has been added to <PaymentData>.

Example Old XML Structure

```
<PaymentData>
  <AuthorizationType>0</AuthorizationType>
  <AuthorizationCode>831000</AuthorizationCode>
  <Amount>1.00</Amount>
  <PaymentRequestID>4916104037596904201029</PaymentRequestID>
  <TransactionReferenceNumber>4916104037596904201029</
TransactionReferenceNumber>
</PaymentData>
```

Example New XML Structure

```
<PaymentData>
  <PaymentInfo>
    <AuthorizationType>0</AuthorizationType>
    <AuthorizationCode>831000</AuthorizationCode>
    <Amount>1.00</Amount>
    <PaymentRequestID>4916104037596904201029</PaymentRequestID>
    <TransactionReferenceNumber>4916104037596904201029</
TransactionReferenceNumber>
  </PaymentInfo>
</PaymentData>
```

XML Request Object

The XML Request Object has been changed to reflect the migration to Business Center reporting. The following fields have moved from the Request object to the PaymentInfo object:

- TransactionReferenceNumber
- eCommerceIndicator

The following fields were added to the Request object:

- PartnerOriginalTransactionID
- TerminalSerialNumber
- PartnerSDKVersion

**Note**

These fields will only be present if they return values.
