

Mark McCulloch

From: Mark McCulloch
Sent: Wednesday, October 14, 2020 4:45 PM
To: Stephen Mosley; Joseph Muennich; Michael Syljuberget; Joseph Mitchell; Hannah Schneider-Lynch; Greg Cole; Chris Friedrich; Tim Louie; Angie Peatow; Tamarra White; Jim Bouse; Cindy Nelson; Stacy Williams-Wright; Angie Henbest; Shaymond Michelson; Krista Borg
Cc: CJ Nelson; Mark McCulloch
Subject: QuikPAY Service Advisory Board (eCommerce Focus)

Thanks to everyone who was able to meet today.

Here are my notes to share:

1. We decided to meet a few times per year and to host separate meetings this one for the eCommerce service and another for the Listener API service. The API focused meeting is more technical and intended for developers and is scheduled for October 26th.
2. Joseph added eCommerce development notes for past few years to the QuikPAY SAB Teams site.
3. Mark promised to describe our different payment services on our Payment Card Acceptance web page in chart form, and message BAONEWS for awareness.
4. Joseph summarized the current eCommerce feature set:
 - a. Drupal self serve order form construction
 - b. Add products or events to the inventory of a form
 - c. Add custom questions
 - d. Choose payment by credit card, echeck or both
 - e. Optional custom receipt page
 - f. Custom banner at top perhaps for you conference
 - g. Review process by Stephen or Joseph before form goes live (to check accounting of the deposit).
 - h. Edits are allowed for pricing, products, product descriptions, users can disable products or the form itself.
 - i. Expiration date for products was a feature considered but not implemented.
 - j. Two links on the ecommerce
 - k. Optional daily or weekly email summarizing transactions
 - l. Transaction reporting:
 - Reporting is available at ecommerce.uoregon.edu from three perspectives a. By form, b. By product (from the inventory page) and c. By looking at the stream of transactions coming in.
 - Users can filter by transaction status (completed or incomplete or rejected or refunded).
 - Users can get geographic charts or tables showing location of payments.
 - Users can track different form URLs to determine how customers are finding their site.
 - m. Ability to accept one time payments.
5. Joseph described recent development work:
 - New version 3 API.
 - Moved eCommerce to central Drupal hosting
6. Joseph described development work under consideration for product road map:
 - a. Would like to move away from Drupal Editable fields module for more responsive design
 - b. Considering spinning off a second ecommerce site B for performance at scale.
 - c. Would like to create a better back up and recovery infrastructure (separate reporting form order forms).
 - d. Could support an expiration date for products.

- e. Could support alternative payment processors such as Authorize.NET or PayPal in addition to QuikPAY. This would require contracting, vetting for PCI compliance, new merchant bank account, funding model, and integration with Banner.
- f. Over time campus departments have evaluated other payment service providers, often boutique providers with specialized functionality that eCommerce can't match. For example career center, housing, athletic camp, parking and rec center have specialized payment solutions. Several departments have dabbled with RegOnline, EventBrite and Cvent for conference registration. Most come back to eCommerce/QuikPay for cost saving. When using QuikPAY departments avoid contracting, merchant banking, PCI compliance, and manual Banner deposits.
- g. Shaymond described a challenge using Excel to merge custom fields with standard payment report data for large complex events. We have tried to address this common business need. Joseph will follow up with Shaymond. Reporting can always be improved so please share any challenges you are facing.
- h. We sometimes use Qualtrics as front end to collect custom data then link to an ecommerce form. We would like to be able to pass the data to ecommerce so the payer does not have to re-enter it.
- i. Ability to shop across department products. Angie said that it would be more efficient for incoming students to be able to pay their orientation fee, housing deposit and tuition deposit in a single transaction.

Please share any feature requests using the MS Teams site to help us flesh out our product roadmap.

Cheers

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