

## **Sundial Account Setup Checklist**

Please complete these steps and provide indicated information to the Sundial administrator.

**New Sundial Users:** Contact the Sundial administrator with your department name and the UNIs for all users who should have access to your event listing and registration set-up.

### **If you do not already have a Virtual Merchant Account:**

- \_\_\_ create your event listing in Sundial and enable a basic registration form that includes your refund policy
- \_\_\_ give "view event" permissions to the "Public/Everyone" group for your event listing
- \_\_\_ contact the Office of the Treasurer to create a new Elavon/Virtual Merchant account  
Current contact: Avi Mimun, [avi.mimun@columbia.edu](mailto:avi.mimun@columbia.edu)  
Indicate that this account should have a user ID configured to work with Sundial.  
Indicate whether you want to accept American Express cards.  
Provide URL for your event listing/registration form to Office of the Treasurer/Elavon.

### **If you have a Virtual Merchant Account and you do not have an account for web transactions yet, log-in to myvirtualmerchant.com and complete the following steps:**

- \_\_\_ create a new user with the user ID "dept\_website," where dept replaces your department name.
- \_\_\_ add terminal association to this user  
Select "edit user" and then "add terminal association."
- \_\_\_ add Sundial registration as an HTTP referrer  
Under the red terminal menu, select advanced system setup. Check the "Enable HTTP Transaction box and enter <https://calendar.columbia.edu/sundial/webapi/register.php> as the URL. Click "add referrer" and then "update."

MerchantConnect | Support Section | Help | Logout

**VirtualMerchant**

User: [redacted]  
Account: [redacted]  
Terminal: [redacted]

⊕ Credit Card  
⊕ Current Batches  
⊕ Settled Batches

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**System Setup**  
This form is used to configure the advanced system settings.

Authorized Referrer successfully removed

**Advanced Configuration**

**HTTP Options**

Enable HTTP Transaction   
Use HTTP Referrers   
Authorized Referrers: <https://calendar.columbia.edu/sundial/webapi/register.php>   
 \_\_\_\_\_

**Processing Options**

Auto Pend HTTP Transactions   
Auto Settlement   
Auto Settlement Time (EST)

- \_\_\_ check that you have an invoice number field  
Under the red terminal menu, select merchant payment fields. Check the list of fields for this entry: "Invoice Number, yes/no, ssl\_invoice\_number, System Field." If it is not present, contact Merchant Services for activation of this field.
- \_\_\_ check that you only provide the "Address1" and "Postal Code" fields  
Under the red terminal menu, select merchant payment fields and look under the Billing Address section.) Edit any other fields by unchecking the Required box and clicking "Update."

# Payment Fields

This form is used to update the field use and order.

Payment Field Setup				
▲ ▼	Order Section	Required	OrderSection	System Field
▲ ▼	Account Data/MICR Data	Yes	ssl_account_data	System Field
▲ ▼	Expiration Date(MMY)	Yes	ssl_exp_date	System Field
▲ ▼	Amount	Yes	ssl_amount	System Field
▲ ▼	CVV2 Indicator	Yes	ssl_cvv2cvc2_indicator	System Field
▲ ▼	CVV2	No	ssl_cvv2cvc2	System Field
▲ ▼	Customer Code	No	ssl_customer_code	System Field
▲ ▼	Sales Tax	Yes	ssl_salestax	System Field
▲ ▼	Invoice Number	No	ssl_invoice_number	System Field
▲ ▼	Approval Code	Yes	ssl_approval_code	System Field
▲ ▼	Description	No	ssl_description	System Field
Add New Field				
▲ ▼	Billing Address	Required	BillingAddress	System Field
▲ ▼	Company	No	ssl_company	System Field
▲ ▼	First Name	No	ssl_first_name	System Field
▲ ▼	Last name	No	ssl_last_name	System Field
▲ ▼	Address1	Yes	ssl_avs_address	System Field
▲ ▼	Address2	No	ssl_address2	System Field
▲ ▼	City	No	ssl_city	System Field
▲ ▼	State/Province	No	ssl_state	System Field
▲ ▼	Postal Code	Yes	ssl_avs_zip	System Field
▲ ▼	Country	No	ssl_country	System Field
▲ ▼	Phone	No	ssl_phone	System Field
▲ ▼	Email Address	No	ssl_email	System Field
Add New Field				
▲ ▼	Shipping Address	Required	ShippingAddress	System Field
▲ ▼	Ship to Company	No	ssl_ship_to_company	System Field
▲ ▼	Ship to First Name	No	ssl_ship_to_first_name	System Field
▲ ▼	Ship to Last name	No	ssl_ship_to_last_name	System Field
▲ ▼	Ship to Address1	No	ssl_ship_to_address1	System Field
▲ ▼	Ship to Address2	No	ssl_ship_to_address2	System Field
▲ ▼	Ship to City	No	ssl_ship_to_city	System Field
▲ ▼	Ship to State/Province	No	ssl_ship_to_state	System Field
▲ ▼	Ship to Postal Code	No	ssl_ship_to_zip	System Field
▲ ▼	Ship to Country	No	ssl_ship_to_country	System Field
▲ ▼	Ship to Phone	No	ssl_ship_to_phone	System Field
Add New Field				

**If you have a Virtual Merchant Account and you already have an account for web transactions, log-in to myvirtualmerchant.com and complete the following steps:**

- \_\_ ensure that your "dept\_website" user ID is associated with a terminal (under "edit user")
- \_\_ add Sundial registration as an HTTP referrer

Under the red terminal menu, select advanced system setup. Check the "Enable HTTP Transaction" box and enter <https://calendar.columbia.edu/sundial/webapi/register.php> as the URL. Click "add referrer" and then "update." See 'System Setup' screenshot.

\_\_ check that you have an invoice number field

Under the red terminal menu, select merchant payment fields. Check the list of fields for this entry: "Invoice Number, yes/no, ssl\_invoice\_number, System Field." If it is not present, contact Merchant Services for activation of this field. See 'Payment Fields' screenshot.

\_\_ check that you only provide the "Address1" and "Postal Code" fields

Under the red terminal menu, select merchant payment fields and look under the Billing Address section.) Edit any other fields by unchecking the Required box and clicking "Update." See 'Payment Fields' screenshot.

**Once the steps above have been completed, provide the following information to the Sundial administrator:**

\_\_ terminal account number (6 digits)

\_\_ terminal user name (usually "dept\_website")

\_\_ terminal PIN (6 integers)

\_\_ account contact name and email

**Gift Systems (optional)**

\_\_ ensure that all Gift Systems set-up requirements have been met

Current contact: Yvonne Boothe (UDAR), [yb4@columbia.edu](mailto:yb4@columbia.edu) or 212-870-2590.

*Bring the following information to your training session:*

\_\_ premium code      \_\_ allocation code      \_\_ division

**Please direct all finance- and Elavon-related questions to the Office of the Treasurer or to Elavon.  
If you have Sundial questions, please email [sundial-help@columbia.edu](mailto:sundial-help@columbia.edu).**