Processing Event Transactions
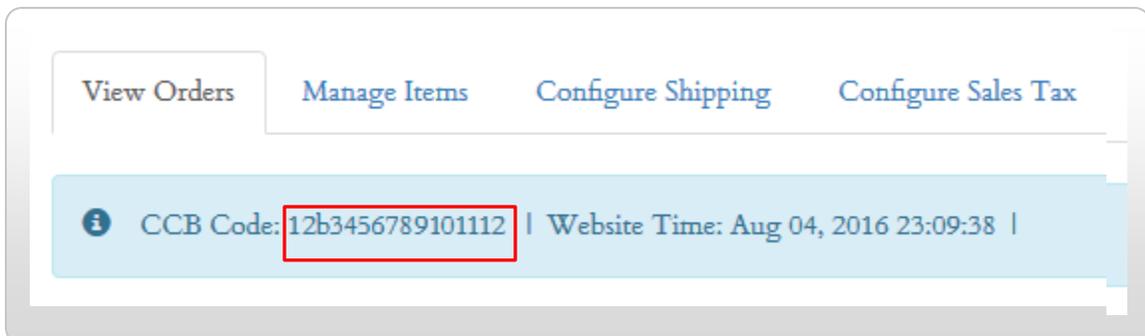
As a site administrator, you sometimes may need to process payment transactions on a user's behalf. For example, one of your organization's members may wish to purchase tickets to an event, but may have temporarily lost access to his or her account. The sections that follow show you how to use Harvard's web management system to purchase items for your site's users in these types of scenarios.
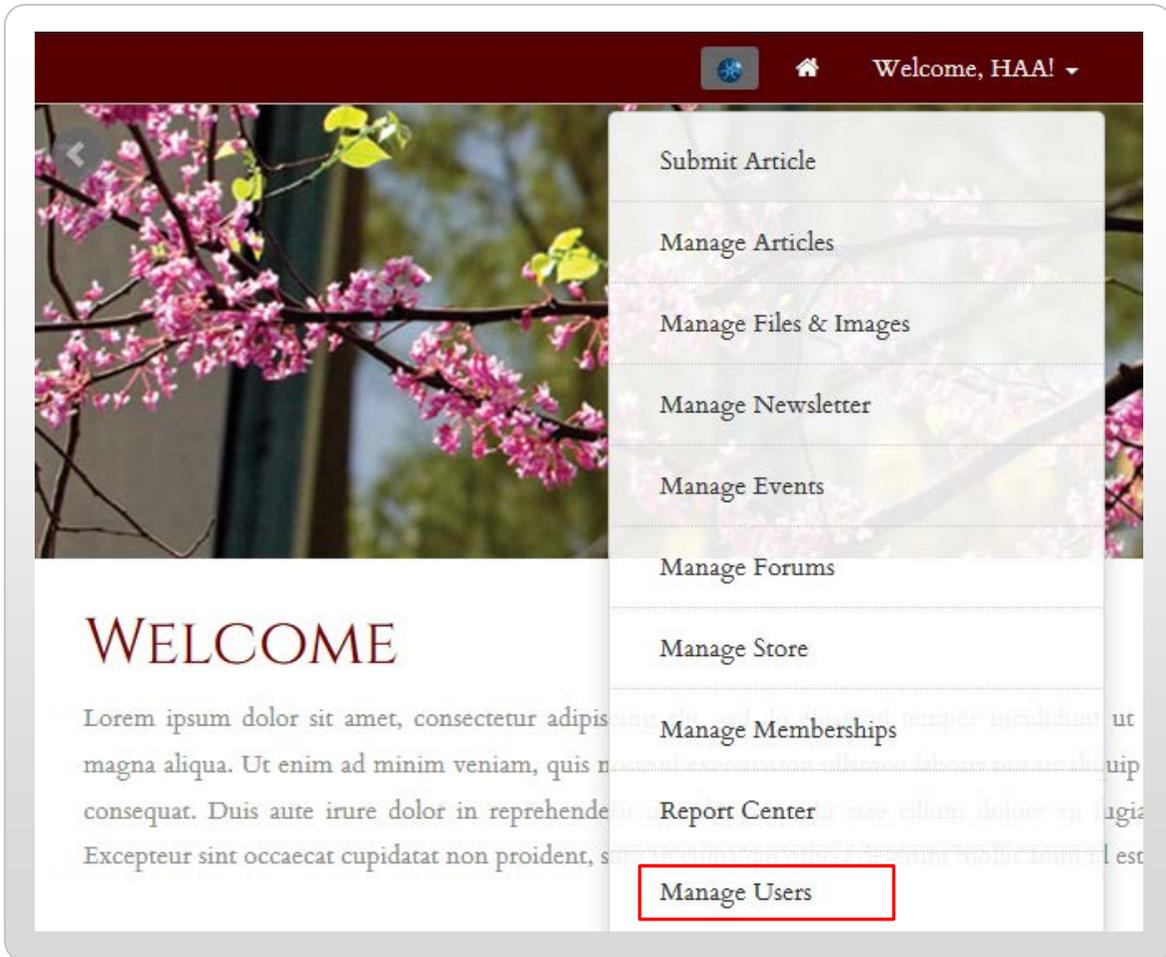
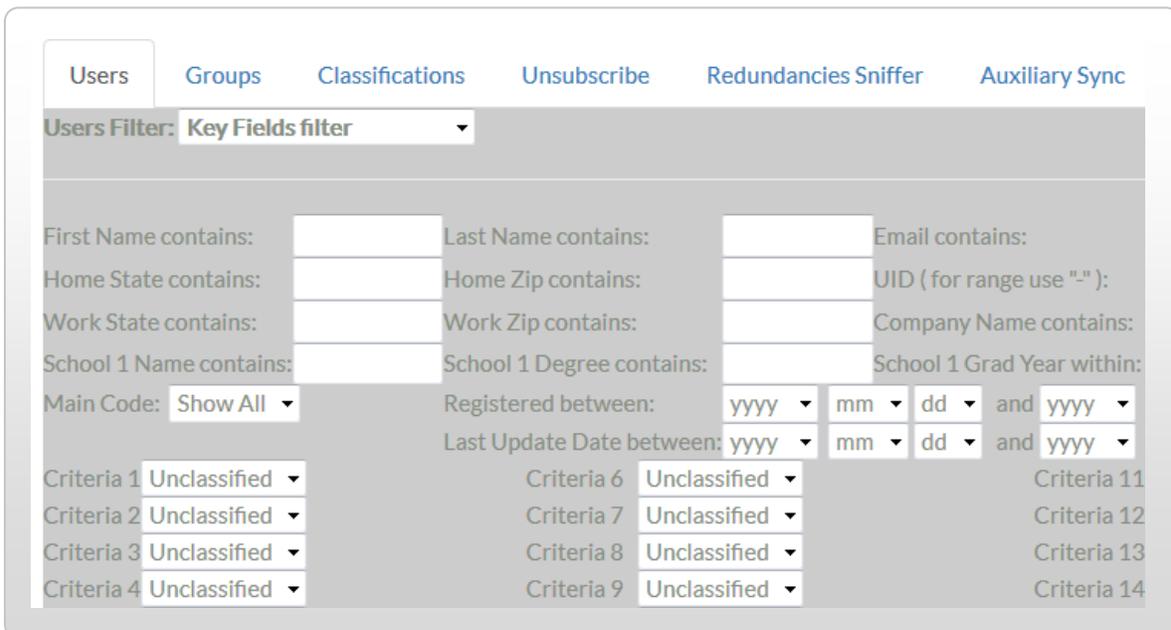1. Click the admin menu button and select "**Manage Store.**"
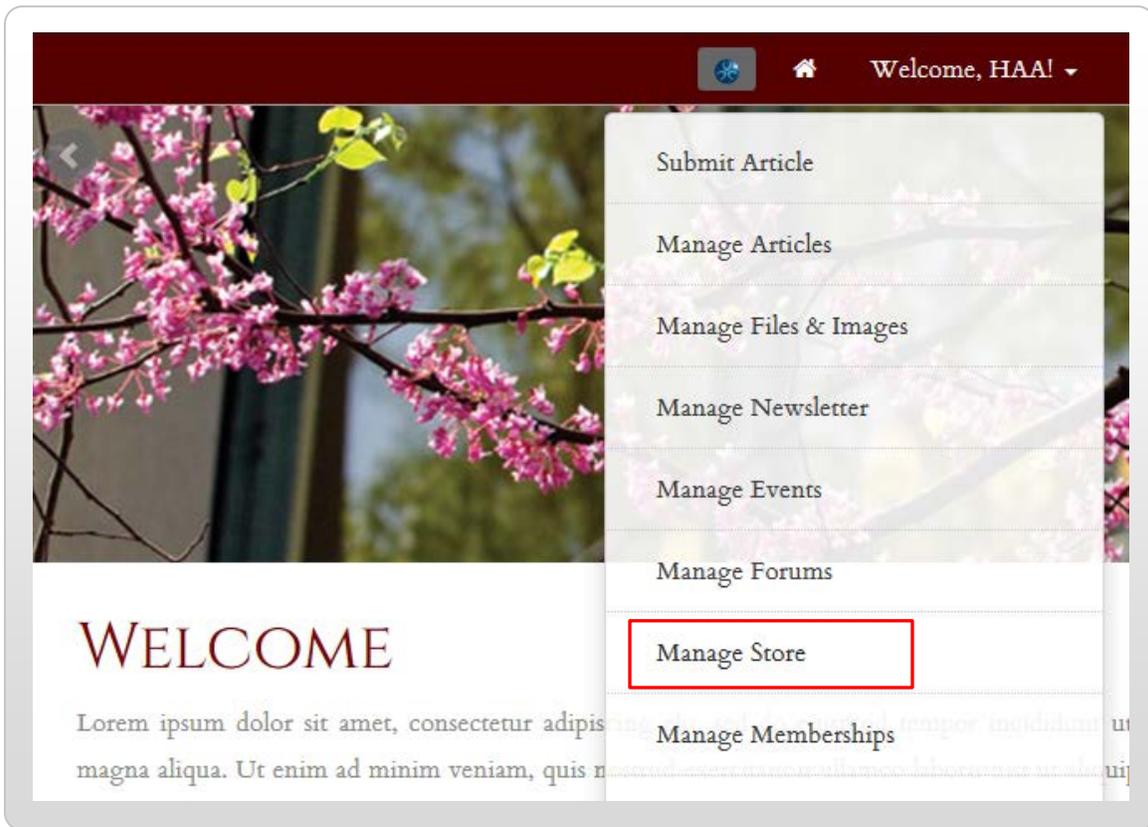
The **order management screen** appears. Locate the **CCB code** at the upper left of your screen, and copy it into a separate document—you'll need this code to complete the steps that follow.

2. Next, select "**Manage Users**" from the admin menu:

Submit Article

Manage Articles

Manage Files & Images

Manage Newsletter

Manage Events

Manage Forums

Manage Store

Manage Memberships

Report Center

Manage Users

WELCOME

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Welcome, HAA! ▾

The **profile management** screen appears—use the search fields within this screen to locate the user for whom you would like to process a transaction:

Users	Groups	Classifications	Unsubscribe	Redundancies Sniffer	Auxiliary Sync

Users Filter: Key Fields filter

First Name contains:	Last Name contains:	Email contains:
Home State contains:	Home Zip contains:	UID (for range use "-"):
Work State contains:	Work Zip contains:	Company Name contains:
School 1 Name contains:	School 1 Degree contains:	School 1 Grad Year within:
Main Code: Show All ▾	Registered between: yyyy ▾ mm ▾ dd ▾ and yyyy ▾	
	Last Update Date between: yyyy ▾ mm ▾ dd ▾ and yyyy ▾	
Criteria 1 Unclassified ▾	Criteria 6 Unclassified ▾	Criteria 11
Criteria 2 Unclassified ▾	Criteria 7 Unclassified ▾	Criteria 12
Criteria 3 Unclassified ▾	Criteria 8 Unclassified ▾	Criteria 13
Criteria 4 Unclassified ▾	Criteria 9 Unclassified ▾	Criteria 14

3. To perform the search, click the "**Apply Filter**" button next to the "**Output to Browser**" drop-down menu below the search fields:

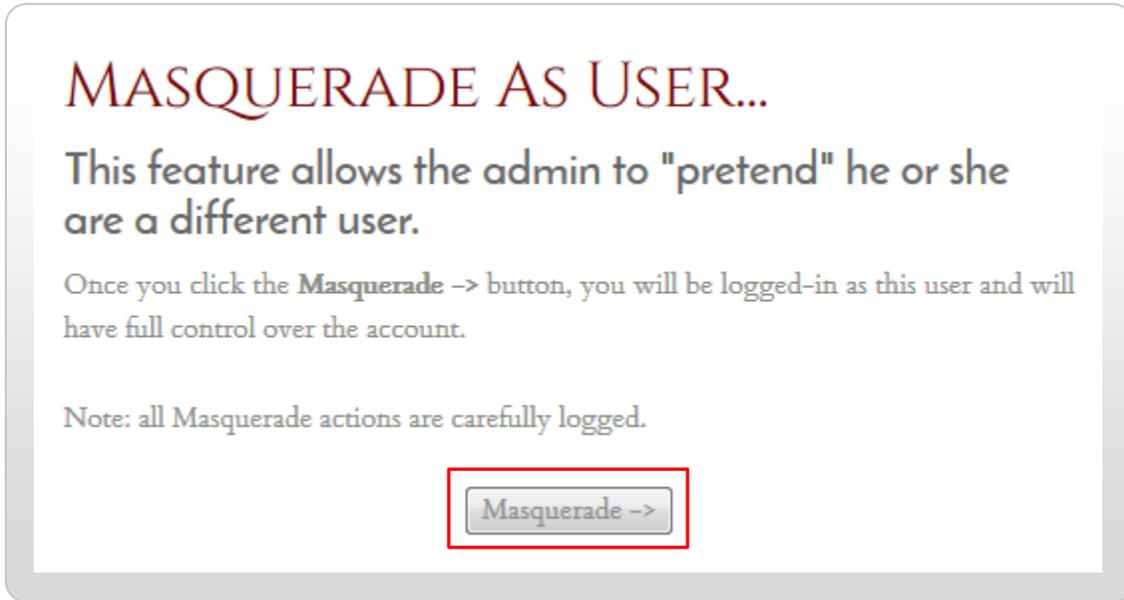Results for your search appear below the "Apply Filter" button within your web browser:

4. To process a transaction for a specific user, select "**Masquerade as User**" under the "**Action**" dropdown menu to the right of the user ID:

A confirmation screen appears; click the "**Masquerade**" button at the bottom (see next page for a visual representation).

5. Click the "**Masquerade**" button at the bottom of the confirmation screen:

MASQUERADE AS USER...

This feature allows the admin to "pretend" he or she are a different user.

Once you click the **Masquerade** -> button, you will be logged-in as this user and will have full control over the account.

Note: all Masquerade actions are carefully logged.

Masquerade ->

A second confirmation screen appears—select the "**Click here to begin the new session**" link.

YOU ARE NOW UID# 17

What does this mean?

The system has initiated a new session for you as user # 17 .

Click here to begin the new session.

Note, you will be taken to the home page. Also, you will have the red "Reverse MAU" button at the top to go back to being an admin once your work as this user is finished.
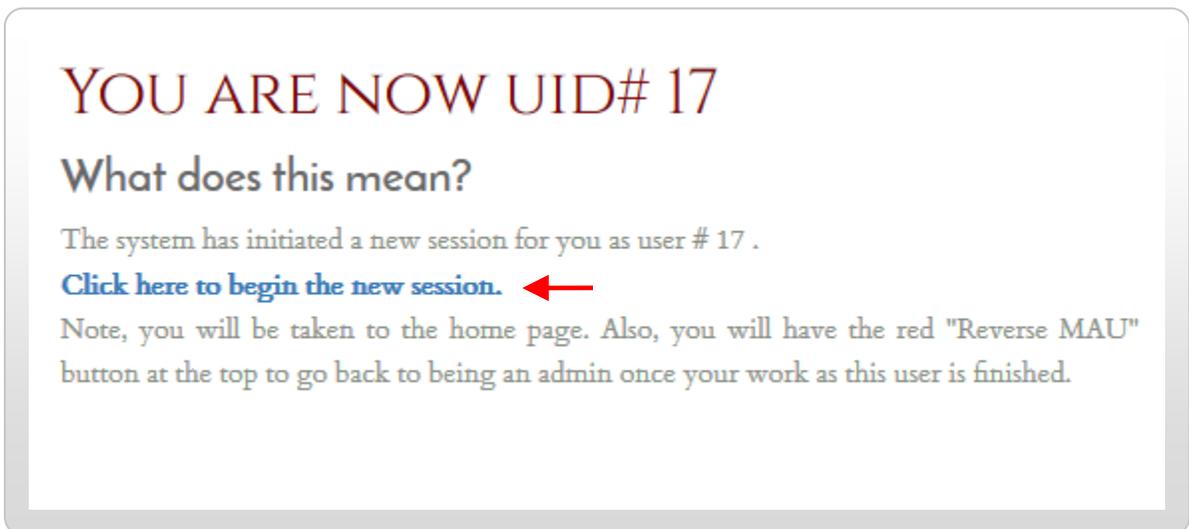
A new user masquerade session is initiated under the user ID you selected (i.e., you are now logged into the system as the selected user).

6. Verify that you are logged in as the selected user by ensuring that the "**Masquerade as User (MAU)**" menu appears at the upper left of your screen (you'll also need to use this feature to close your session when done).


The "**Masquerade as User (MAU)**" menu.
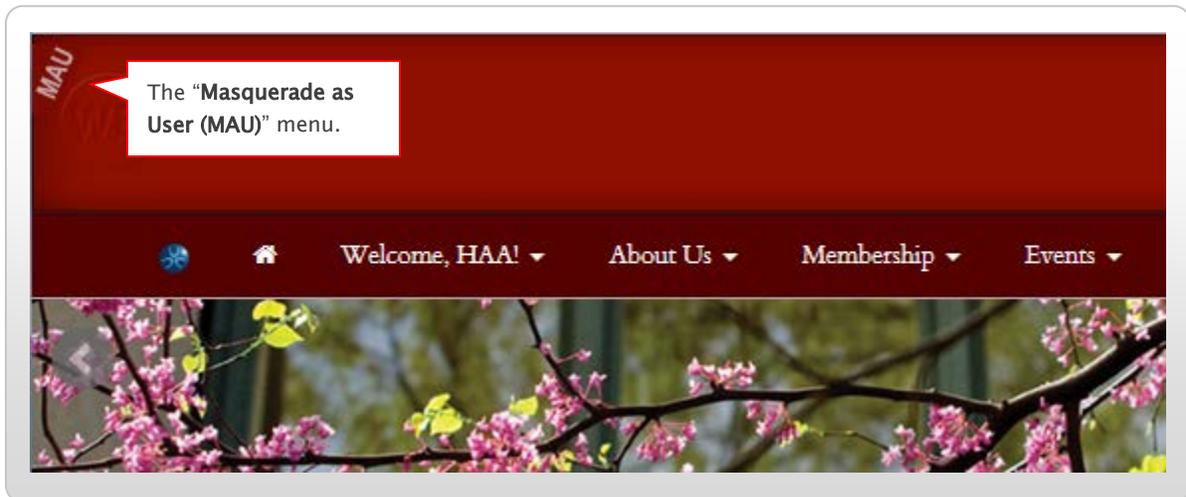
Note: If you do not see the icon for the MAU menu, post a question to Support Tracker or contact alumni_magnet@harvard.edu for assistance—the AlumniMagnet team will respond as soon as possible.

7. Once you've confirmed that your session is active, you can then purchase items on the user's behalf. For example, if the user wishes to buy event tickets, you can proceed to the events page:
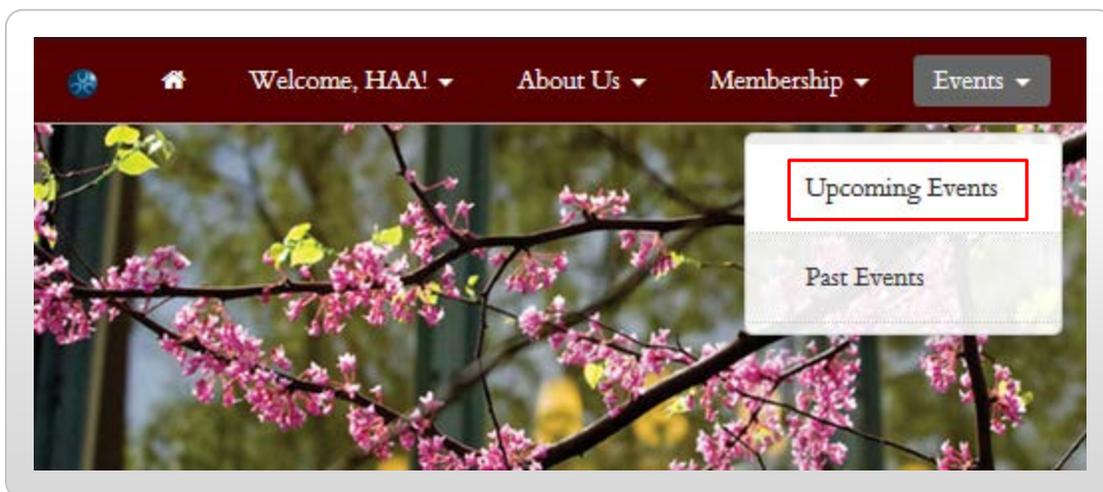
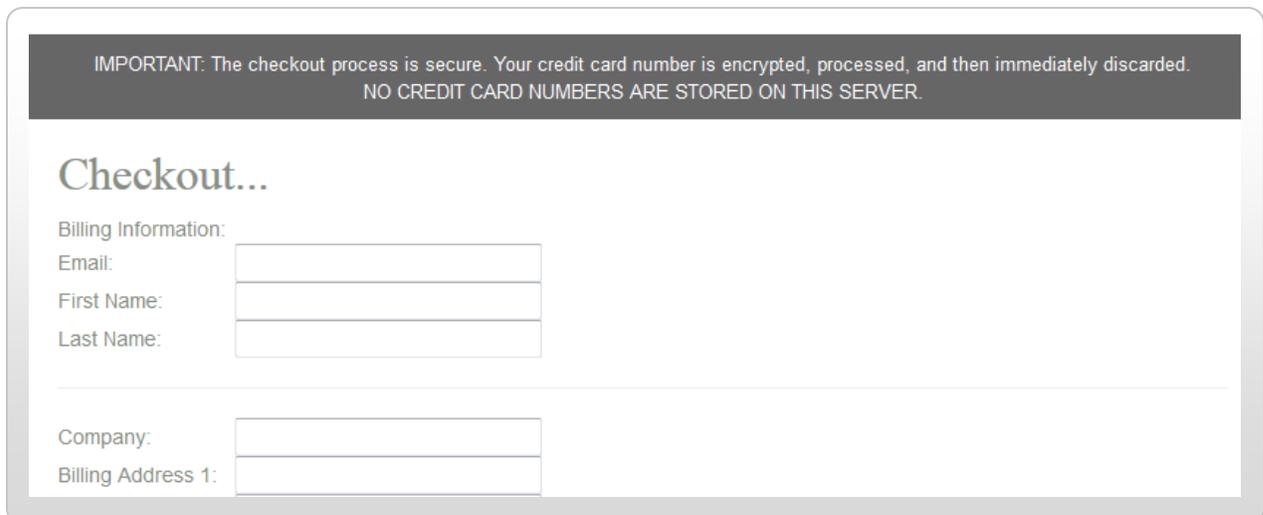8. Navigate to the item the user would like to purchase—in this case, we'll select an event ticket:
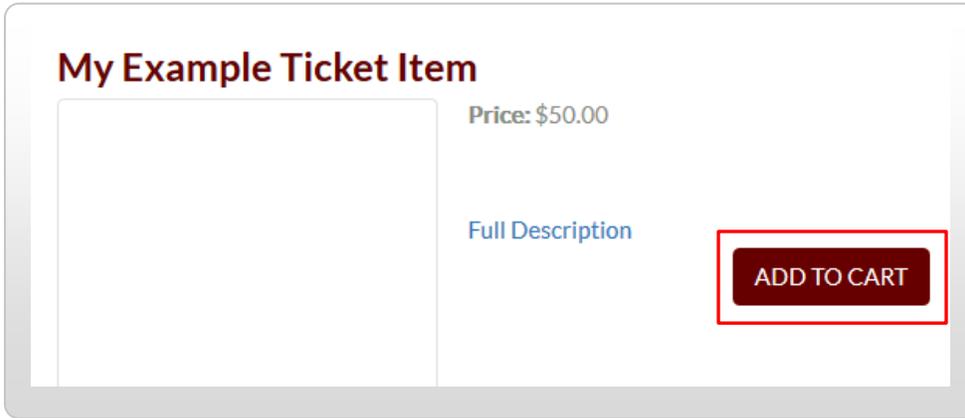
Click the "**Add to Cart**" button to purchase the item.

9. From the shopping cart screen, click the "**Checkout**" button to pay for the item:
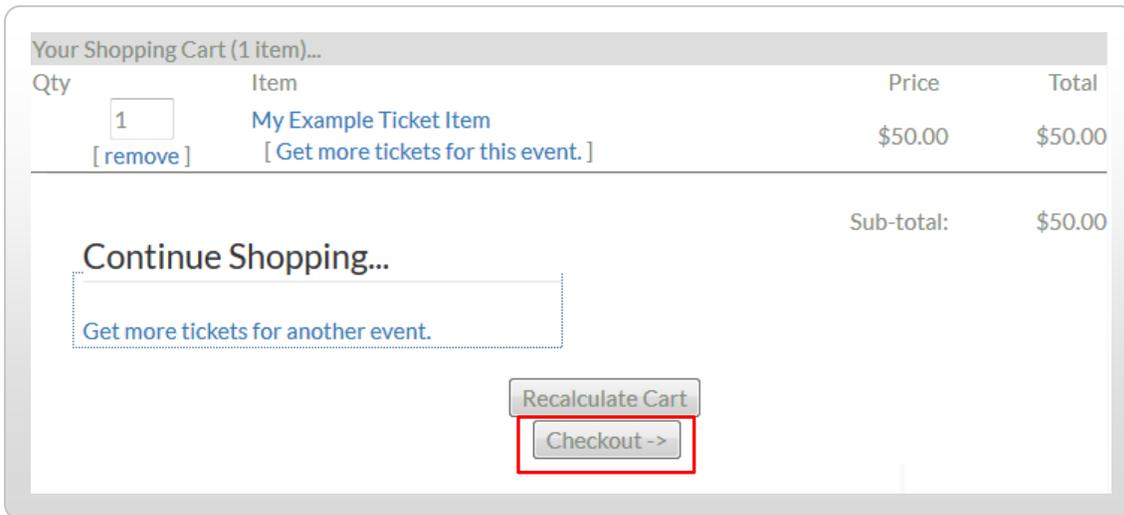
The **checkout screen** appears—enter the user's billing information into the fields provided:

10. In the **credit card field**, enter the **CCB code** obtained in step 1. Ensure that there are no spaces before or after the number:

11. Click anywhere **outside** of the credit card number field. A **drop-down menu** containing a list of payment types appears to the right of the code you just entered—select the appropriate payment method from the options provided:


Note: If you do not know which payment type to select, contact the user for whom you are making the purchase to obtain this information before proceeding.

12. After completing the form, click the "**Confirm**" button at the bottom of the screen. The user will receive an email confirming the transaction.
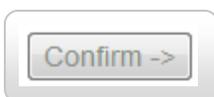
13. Once the user's purchase is finalized, you'll need to end your MAU session. Roll over the MAU menu icon shown in step 7 to expand it, and select "**click to reverse**" to exit the account.
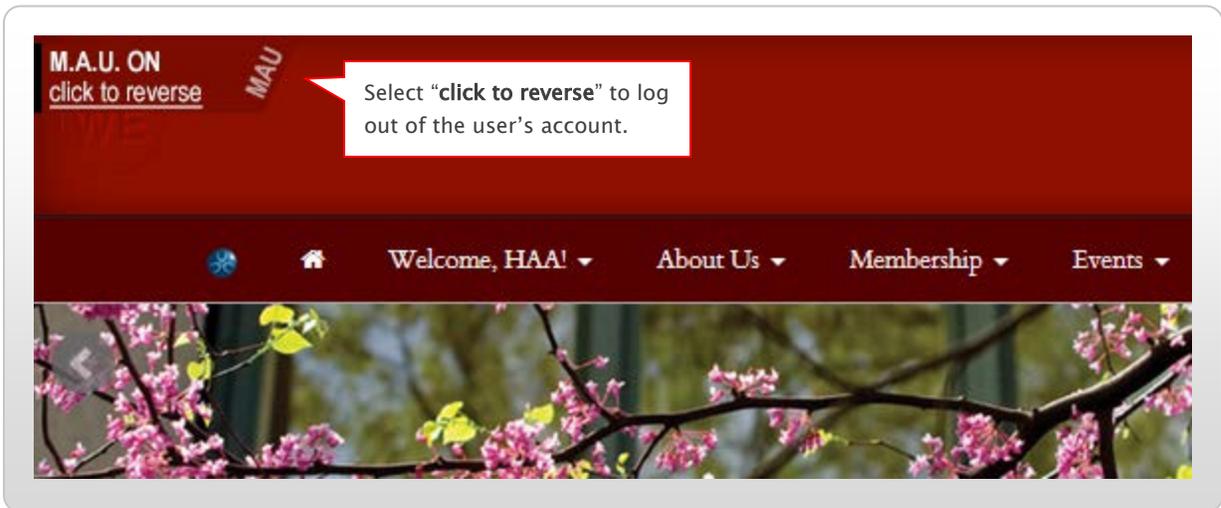
The system logs you out, and your previous session as a system administrator resumes.

Note: If you need to process transactions for more than one user, be sure to click the "**Home**" button 🏠 after ending each MAU session. This resets your browser and prevents the occurrence of session errors, as well as accidental overwriting of user profile information.

14. To verify that your transaction was processed, return to your site's store as shown in step 1. Use the search fields in the **order management** screen to locate the purchase made in the preceding sections:

To perform the search, click the "**Apply Filter**" button at the bottom of the screen.

15. Once you've located the user's order within your search results, ensure that the "**payment type**" column contains an entry beginning with "**CCB**"—this code indicates that an administrator processed the order on the user's behalf:

ORDER DATE	STATUS	PMNT TYPE	TOTAL	
05/06/2013 16:59	paid	CCB - check	150.00	⚙
05/06/2013 16:30	paid	CCB - check	75.00	⚙

The above example shows a CCB transaction with a payment processing method of "check." If the user selected a different payment method (credit card, money order, etc.), this would appear in the column instead.

16. **Important:** make sure to delete any documents created in step 1 that contain copies of the CCB code used in the preceding sections. **The CCB code is confidential and should not be saved or distributed.**

Anyone with access to the CCB code has the capability to process transactions without providing actual payment for the items received. Also, since this code periodically changes, there's no need to save extra copies of it.

Questions on this guide? Please post any questions to Support Tracker and the AlumniMagnet team will respond as soon as possible.