TouchNet Marketplace 5.0

USER'S GUIDE

Contents

About this Guide

The **Marketplace User's Guide** is for the administrators, managers, and fulfillers who will maintain campus online shopping with TouchNet Marketplace.

This guide does not cover technical setup of the Marketplace software; nor does it explain concepts of online retailing. It describes how to use the features of the Marketplace Operations Center to build and maintain a shopping site.

About TouchNet Marketplace

Marketplace 5.0 gives you the tools to design, build, and maintain online shopping that meets the special requirements of campus e-commerce. Through the Marketplace uStores features, you can set up online stores. Through the uPay features, you can link your existing sites to a set of payment pages that you customize.

This user guide explains how to build and manage your Marketplace site. Marketplace is easy to use, but it does offer a lot of functionality. Some of the terms and processes may be unfamiliar to you. This manual will help you understand the structure of a Marketplace site, how to build your site, and how to use and manage it successfully.

First, you will learn how to plan your site and build a framework of users and merchants. As you proceed through the manual, you will learn how to set up stores, add products, implement promotions, read financial reports, and much more. All of this information is broken into short, easy-to-read sections and supported with Marketplace screen captures and step-by-step instructions.

To Contact Client Services

For technical assistance, continuing customer support, or other questions, contact us at:

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TouchNet Client Services is available Monday through Friday between 7:00 a.m. and 7:00 p.m. Central Time. Extended support hours are available by agreement with TouchNet.

Part 1:

Marketplace Introduction

1.0 Introduction to Marketplace

TouchNet Marketplace enables campuses to build and operate secure, web-based shopping cart applications and online payment pages. It connects buyers and sellers electronically, making it easy for students, parents, alumni, and the community to do business with the campus. Marketplace allows institutions to take control of security by placing financial transactions in the hands of appropriate campus authorities, while the responsibility for storefront appearance and contents is given to authorized campus groups.

TouchNet Marketplace does not require extensive programming skills to implement and deploy. It uses TouchNet Payment Gateway™ for electronic payment processing; it uses the Marketplace Operations Center as the web software interface that allows you to build and manage online shopping sites and online payment pages; and it uses the familiar shopping cart theme to allow buyers to browse and make purchases online.

TouchNet Marketplace is a self-contained e-commerce solution, combining online storefronts with inventory control, order fulfillment, and financial reporting.

1.1 Marketplace Web Applications

Marketplace includes three web-based applications: the Marketplace Universal Stores (uStores) shopping site, the Marketplace Universal Payment (uPay) site, and the Marketplace Operations Center administrative site.

- uStores is a collection of online stores that can be set up by campus departments and organizations. Shoppers can use the uStores site to browse store contents and make purchases.

- uPay is a web application that customers use to make a one-time or recurring payment. For example, one uPay site might take alumni donations and another might take conference registration fees. uPay online payment pages can be connected to your existing web applications and web sites.

- The Marketplace Operations Center is the web application for building and editing your Marketplace site. This web application allows you to create and customize Marketplace stores and payment pages, view reports, create and edit users, and fulfill orders. The following pages of this user guide show you how to use the Operations Center.

1.2 Getting Started
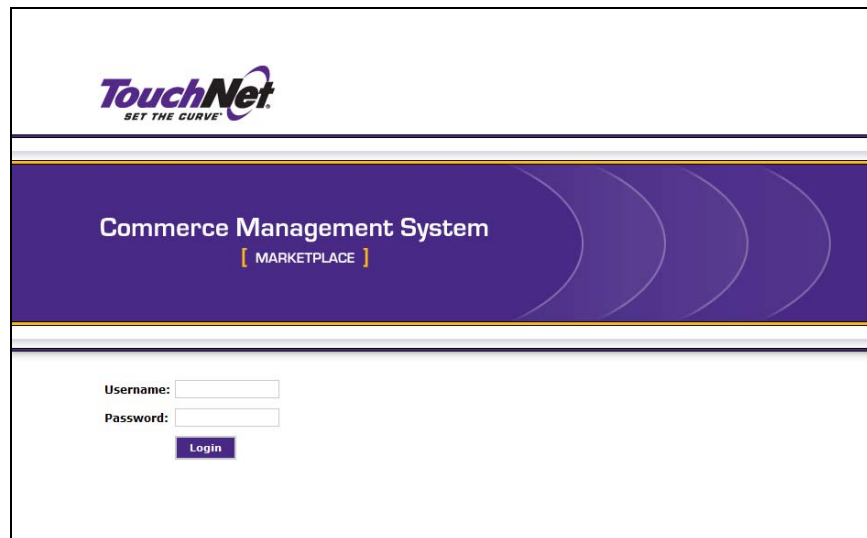
Your first step in building online shopping sites and online payment pages is to use your web browser to launch the Marketplace Operations Center. To launch the Operations Center, you need the Operations Center URL, as well as a username and password.

The default URL for the Marketplace Operations Center is

> https://*<server>*/tmsadmin/web/login.jsp

where <server> is the computer where the Marketplace Operations Center web application is installed.

When you enter this URL in your browser's address field, the Login page for the Marketplace Operations Center appears, as shown below.

Your login credentials might come directly from the Marketplace chief administrator (especially if you will be an administrator or merchant manager), or your login credentials might come from someone who was subsequently assigned a Marketplace role (especially if you will be a store manager, store clerk, or fulfiller).

When the login page appears, enter your username and password and click the Login button.

What You'll See After You Login

After you login to the Operations Center, you'll see the Marketplace Home Page. (On your very first login, you'll be taken to your User Profile page so you can enter your name and contact information. After you enter this information, your home page appears.) Initially, your home page contains few links and little information. However, as stores and uPay sites are

created, the home page will grow in size. This page displays statistics for all the stores and uPay sites available for the user. If this is the first time you have logged into Marketplace and no stores or uPay sites have thus far been created (to which you have access), you will see no statistics displayed on the home page.

Site Navigation

Operations Center site navigation is provided with the Control Menu on the left and the top navigation bar (which includes links for Home, Help, and Logout). The Control Menu displays only those functions that are available to you, depending on your user rights.

As you create stores and uPay sites, additional links will appear in the Control Menu on the left and additional rows will be displayed in the page's statistics tables. On the other hand, if your own duties are limited to system administrative duties, you may not see any additional links in the Control Menu.
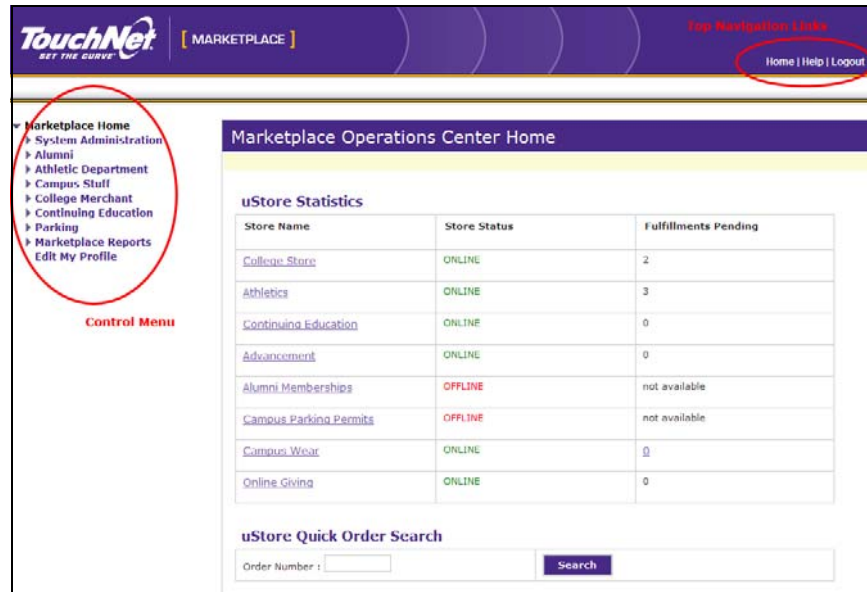
In the example above, the user has system administrative rights (as indicated by the System Administration link in the Control Menu). The user also has access to several stores, so statistics for these sites appear on the home page (as well as Quick Order Search functionality). In addition, navigation links in the Control Menu provide access to the stores and uPay sites.

A Key Concept: Marketplace Merchant

In Marketplace, the word "merchant" has a special meaning, and it's crucial that you understand this meaning. In Marketplace parlance, a merchant is a department or other campus entity (such as a campus organization) that needs to process payments.

Marketplace's use of the term "merchant" allows stores and uPay sites to be grouped into a logical structure. Each merchant in Marketplace can have one or more stores and one or more uPay sites. Before you can create a Marketplace store, you must create a Marketplace merchant. Settings are associated with this merchant that affect its stores and uPay sites.

In addition, each merchant is assigned a merchant manager who creates the stores or uPay sites and manages the merchant's settings, such as the wait period for ACH payments, ACH agreements for uPay sites, and return check fees.

This merchant is named Campus Stuff. →

This merchant has three stores. →
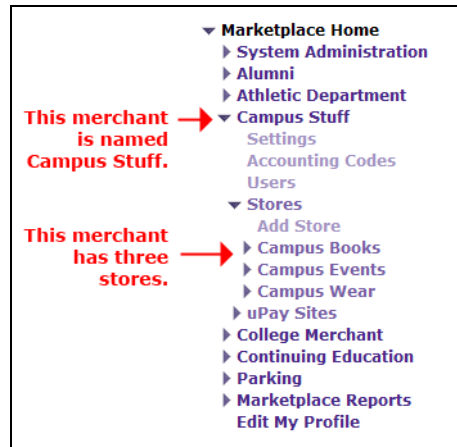
So Now What Do You Do?

So now you've logged onto the Operations Center, you know how Marketplace defines "merchant," and you're looking at your Marketplace Home Page. Where do you go from here and what do you do? The answer to this question depends on your role (or roles) within Marketplace. Therefore, before you begin using the Operations Center, it's crucial that a plan be in place that enumerates who will be assigned the various Marketplace functions. Here is a list of the Marketplace user roles with descriptions of the responsibilities that go with these roles.

User Role	Responsibilities
Chief Administrator	Responsible for adding additional chief administrator and administrators. (See Section 2.2, "Adding Administrative Users" on page 23.)
	Can also perform any of the responsibilities listed below for administrators.

User Role	Responsibilities
Administrator	Responsible for creating merchants. (See Section 2.3, "Adding Merchants" on page 25.)
	Responsible for assigning merchant managers to merchants. (See Section 2.4, "Adding Merchant Managers" on page 28.)
	Responsible for establishing and maintaining configuration settings that affect all Marketplace stores, including accounting codes, tax account codes, product categories, splash page graphics, logo graphics and ACH agreements for stores. (See Section 4.1, "System Administration Settings and Tasks" on page 39.)
	Responsible for assigning an accountant to view reports. (See Section 2.2, "Adding Administrative Users" on page 23.)
Merchant Manager	Responsible for managing the merchant's configuration settings, such as the wait period for ACH payments, ACH agreements for uPay sites, and return check fees. (See Section 2.5, "Merchant Settings" on page 29.)
	Responsible for adding stores to a merchant. (See Section 5.1, "Adding a New Store" on page 75.)
	Responsible for assigning store managers to stores and uPay site managers to uPay sites. (See Section 5.6, "Adding a Store Manager" on page 120 and Section 12.2, "Adding or Changing Site Managers" on page 263.)
	Responsible for adding uPay sites to a merchant. (See Section 11.0, "Building a uPay Site" on page 219.)

User Role	Responsibilities
Store Manager	Responsible for managing store settings, such as the store logo graphic, store categories, store payment methods, and shipping rates. (See Section 5.2, "Store Settings" on page 83.)
	Responsible for assigning store clerks, a store contact, and fulfiller users (including a fulfiller with refund/cancel rights). (see Section 5.7, "Adding Store Users" on page 122.).
	Responsible for adding and editing products. (See Section 6.0, "Adding Products to a Store" on page 131.)
	Responsible for creating store promotions. (see Section 5.5, "Creating Store Promotions" on page 113.)
Store Clerk	Responsible for adding and editing products. (See Section 6.0, "Adding Products to a Store" on page 131.)
	Responsible for moving products among categories. (See Section 6.3, "Managing Products in a Store" on page 153.)
Fulfiller	Responsible for fulfilling orders. (See Section 8.1, "About Payment Types and Fulfillment" on page 183.)
	Responsible for refunding and cancelling orders. Requires fulfiller with refund/cancel rights. (See "Processing Refunds" on page 187.)
Store Contact	Serves as the designated contact who appears on a store site. No responsibilities within the Marketplace Operations Center other than keeping their own contact information up to date on their user profile.
Accountant	Responsible for reviewing the Revenue by Merchant report. (See Section 17.3, "Revenue by Merchant Report" on page 312.)

A Sample Implementation Plan

Following the user roles and responsibilities described in the previous section, you will need to devise a plan for building your Marketplace site in which responsibilities are delegated and assignments are made. Here is a sample plan:

1 **Create Chief Administrator**—The chief administrator logs in (be sure to change the TouchNet assigned password) and assigns the chief

administrator role to another person. This person can then serve as a backup or become the lead contact for building your Marketplace site. Assigning the chief administrator role involves creating a new username and password. The chief administrator forwards the login credentials and the Operations Center URL to the new chief administrator. It's essential that more than one person in your organization serve as a chief administrator because this helps ensure that someone is always available for managing the site at the highest level.

2 **Assign Administrator**—(This step is optional and may not be required by your institution.) The chief administrator who will serve as the Marketplace lead then logs in and assigns the administrator role to someone who will be responsible for creating merchants and managing the settings that affect all the uStores sites. (The chief administrator can also serve this role.) The chief administrator creates the username and password for the new administrator and forwards these login credentials as well as the Operations Center URL to the new administrator.

3 **Create Merchants and Assign Merchant Manager Roles**—The administrator logs in and creates a Marketplace merchant for each campus organization or department that will be creating a store or uPay site. The administrator also assigns a merchant manager for each merchant. As each merchant is created, the administrator has the option of either creating a new user to serve as the merchant manager or to select an existing user to serve in this role. For new merchant managers, the administrator creates a new username and password and forwards these login credentials along with the Operations Center URL to the new merchant manager.

4 **Assign Settings for uStores**—The administrator logs in and manages the global uStores settings. These settings affect all the stores added to your implementation of Marketplace. These settings include delivery methods, accounting codes, tax account codes, and product categories. In addition, these settings include the splash page and logo graphics.

5 **Assign Merchant Settings**—Each merchant manager logs in and assigns the merchant settings. These settings include the wait period for ACH payments, ACH agreements for uPay sites, and return check fees.

6 **Add Stores and/or uPay Sites**—Each merchant manager logs in and adds a store and/or one or more uPay sites to their merchant. (Depending on your institution's preferences, you may use both uStores and uPay, uStores alone, or uPay alone.) As a store or uPay site is created, the merchant manager has the option of either creating a new user to serve as the store manager (or uPay site manager) or to select an existing user to serve in this role. For new store managers (or

uPay site managers), the merchant manager creates a new username and password and forwards these login credentials along with the Operations Center URL to the new user.

7   **Assign Store Settings**—Each store manager logs in and enters the store configuration settings. These settings include a store logo graphic, store categories, store payment methods, and shipping rates. These settings only affect individual stores.

8   **Assign Store Clerk**—Each store manager can also assign a store clerk to the store. The store clerk has the authority to add and maintain products, as well as define product category assignments. After assigning a store clerk, the store manager forwards the merchant name and store name to the store clerk (as well as the login credentials and Operations Center URL if the store clerk is a new user).

9   **Assign Fulfiller Role**—Each merchant manager or store manager logs in and assigns a fulfiller to their store. (The store must have at least one fulfiller with cancel/refund rights.) The fulfiller will be responsible for fulfilling orders. After assigning a fulfiller, the store manager forwards the merchant name and store name to the fulfiller (as well as the login credentials and Operations Center URL if the fulfiller is a new user).

10 **Add products**—Each store manager or store clerk logs in and adds products to their store. A new product wizard leads you through the process of adding a product. In preparation, though, you need to have considered several pieces of information, such as product descriptions, prices, product categories, product graphics, and product options (such as size and color). You can also import products (in CSV format).

11 **Bring Store Online**—Each merchant manager or store manager logs in, navigates to the store's General Settings page, and clicks the Bring Store Online button.

After Marketplace is Set Up

After Marketplace has been set up and stores and uPay sites have been added, one or more people will be responsible for maintaining the stores and uPay sites, fulfilling orders, and reviewing reports. Therefore, a plan must be in place that delineates the on-going Marketplace responsibilities. Here is a brief discussion of the on-going responsibilities that must be managed.

• **Product Maintenance**—Product maintenance includes editing product features, moving a product to a different category for display, enabling or disabling a product, and changing the inventory count of a product. In addition, user roles must be maintained so that the appropriate people have access to stores.

• **Fulfilling Orders**—A store fulfiller completes order processing by accepting payments, entering fulfillment information, and sending

shipments to buyers. Fulfillers with refund/cancel rights can also cancel part or all of a pending order (if paid by credit card) and refund payment for an order.

- **uPay Site Management**—A merchant manager or uPay site manager can update settings for a uPay site. These settings include layout selections, image management, payment settings, messages, and titles. In addition, merchant managers or uPay site managers are responsible for refunds and cancellations.

- **Reviewing Reports**—Several reports are available within Marketplace. Chief administrators, administrators, and accountants can view the Revenue by Merchant report. Merchant managers can view the Merchant Revenue report. Store managers and merchant managers can view the Store Revenue report (by product, stock number, and product type, as well as by totals). And uPay site managers and merchant managers can view the uPay Revenue report and the Posting Status report.

1.3   Your Home Page

After you login to the Marketplace Operations Center, you'll see your home page—unless this is the very first time that you've logged in to Marketplace, in which case the Edit Profile page will appear.

Your Operations Center home page is customized according to your user role(s). For example, if you are an administrator, the home page will display brief site statistics for all the stores and uPay sites that have been established. However, if you are a store manager, the home page will display the statistics for the store(s) that you have access to.

Your home page contains the same site navigation links that you'll find throughout the Operations Center. The Control Menu on the left displays links arranged in a hierarchical structure. These links include System Administration (which you'll see only if you're an administrator), Merchants (with stores and uPay sites listed by merchant), and Marketplace Reports. The top navigation bar includes links for Home, Help, and Logout. (Your My Profile page will be discussed in "Your User Profile" on page 16.)
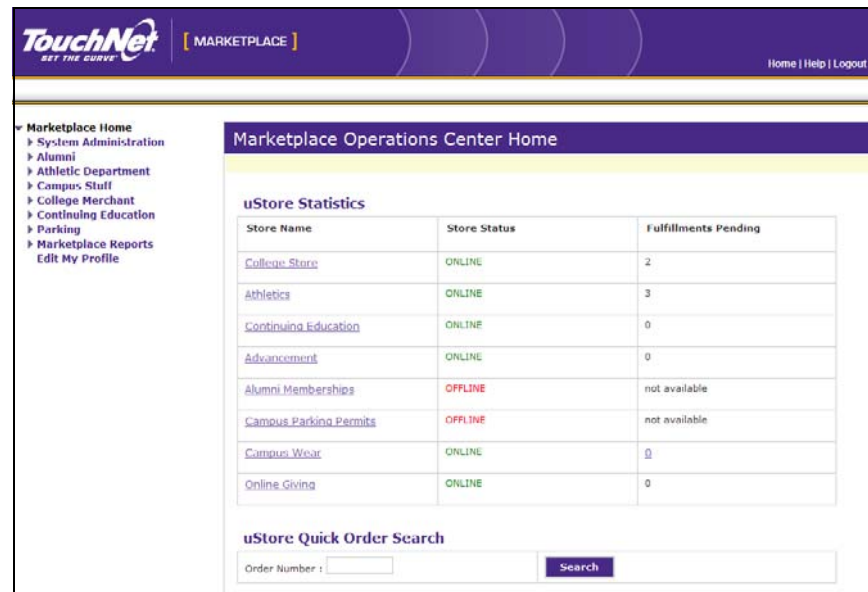
Quick Order Search Functionality

Your home page is generally limited to displaying statistics and navigation links; however, for merchant managers and store managers, the home page also includes Quick Order Search functionality. This input field allows you to enter an order number and search all the stores in which you are the merchant manager or store manager. You might need to use this tool, for example, if a problem with an order (such as Insufficient Funds for the ACH payment method) is identified in TouchNet Payment Gateway. The Payment Gateway administrator can notify a Marketplace administrator that a problem exists with a specific order and forward the order number, which can then be used to get details on the order.

Follow these steps to use Quick Order Search:

1 If you are not already on your home page, select Home from the top navigation bar. Your Home Page appears.

2 Enter an order number in the Order Number field and choose the Search button. If an order is found with this number, the Order Search Results Screen appears. If no order is found (in the stores or uPay sites that you have permission to view), the following message appears: "No order found for your merchants with the given order number."

3 If you would like to view the order detail, select the item's Order ID. The Order Details screen appears.

1.4   Your User Profile

From your home page, you can select the Edit My Profile link in the top navigation bar to view your user profile. This page includes your name, contact information, e-mail notification settings, and the ability to change your own password.

The e-mail notification settings allow you to specify whether you would like to be notified when orders are placed from stores in which you have the role of fulfiller, merchant manager or store manager. This feature is useful when you have a store with low volume and don't want to log in every day just to see if orders were placed. To be notified when an order is placed, simply select the checkbox beside the store and chose the Update Notification Settings button.

If you would like to change your password, please keep in mind that your password is case sensitive and must contain six to twenty alphanumeric characters. In addition, it must contain at least one number and one alphabetic character.

Update Profile

Welcome, Gary Johnson! From this page you can update your contact information, change your password, and decide which stores will notify you when an order is placed.

Profile Information

First Name:	John
Last Name:	Doe
E-mail Address:	jdoe@touchnet.com
Phone Number (day):	
Phone Number (mobile):	
Phone Number (night):	

Update Profile

I would like to receive an e-mail when an order is placed from the following store(s):

☐ Campus Wear

Update Notification Settings

Change your Operations Center password:
(password must be 6 characters minimum with at least one number)

Your current password:	
Enter your NEW password:	
Re-enter your NEW password:	

Change Password

Part 2:

Marketplace Users and Merchants

2.0 Creating a Framework of Users and Merchants

Through the use of the various user roles built into Marketplace, it's easy to assign responsibilities to the members who will be participating in your implementation of Marketplace. It's crucial that you understand the user roles and the responsibilities that go along with each.

2.1 Marketplace User Roles

The hierarchy of Marketplace user roles is divided as follows: the administrative roles, a merchant role, the store roles, and the uPay role. Each user role has specific abilities and limitations.
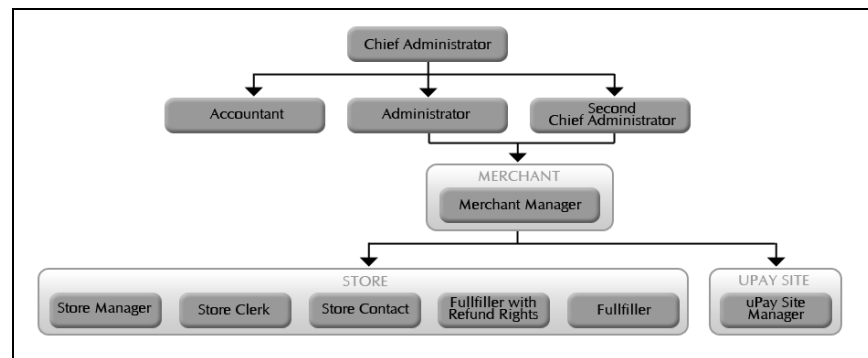
The Marketplace hierarchy

Administrative User Roles

The administrative user roles include:

- Chief administrators

- Administrators

- Accountants

The first chief administrator was established during Marketplace installation and setup. Consider setting up at least one additional chief administrator as

they are the only users who can add and remove other chief administrators and administrators.

User Role	What They Can Do
Chief administrator	• Manage site settings • Add other chief administrator, administrator, accountant, and merchant manager users • Add user groups • Manage user authentication settings • Add new merchants • Review Marketplace financial reports
Administrator	An administrator can do everything a chief administrator can, except add other chief administrators and administrators.
Accountant	Accountant users can review the Revenue by Merchant report. They cannot make any changes to settings or users in Marketplace.
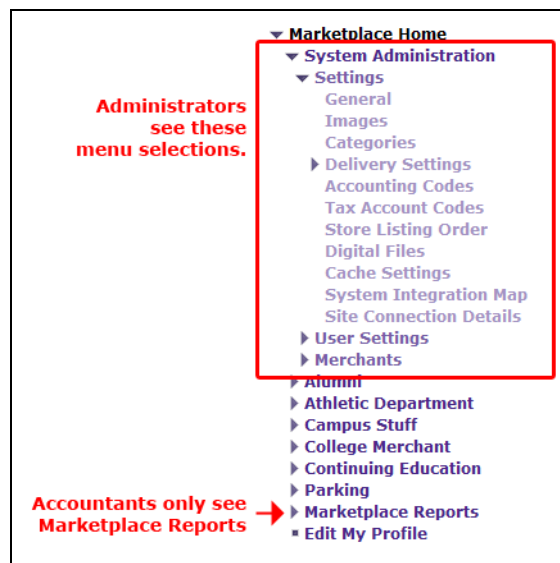
Merchant User Role

The Merchant level user role is the merchant manager. Merchant managers are able to:

• Manage their merchant's settings

- Add store manager and uPay site manager users
- Add a store and uPay sites
- Edit store settings
- Review Marketplace financial reports
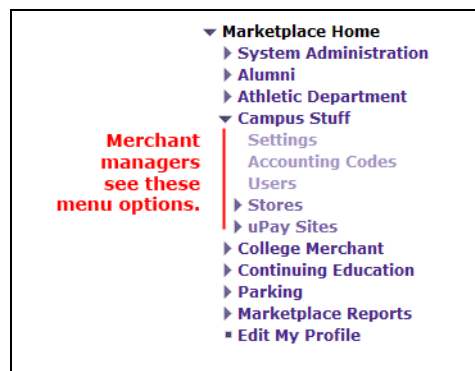
Store User Roles

The store user roles include:

- Store Managers
- Store Clerks
- Store Contacts
- Fulfillers with refund/cancel rights
- Fulfillers

User Role	What They Can Do
Store Manager	• Manage their store's settings including products, categories, images, and payment methods • Designate store clerk, store contact, fulfiller with refund/cancel rights, and fulfiller users • Review Store Revenue reports by Product, Stock Number, Product Type, and Totals
Store Clerk	Add and edit products in their store and move products among categories

User Role	What They Can Do
Store Contact	This is the designated contact that appears on the store site. The contact's e-mail address appears on the store's product and category pages and in automatically generated order confirmation e-mails sent to buyers If no e-mail information is available for the store contact, order confirmations will use the default e-mail address specified by an administrator in the site's general settings
Fulfiller with Refund/ Cancel Rights	• Fulfill orders • Refund orders • Cancel orders • For orders made with an ACH payment method, override the waiting period and proceed with fulfillment
Fulfiller	Fulfill orders

uPay User Role   The uPay user role is the uPay site manager. uPay site managers are able to:

- Manage their uPay site's settings

- Search for payments

- Cancel/refund payments

- Review Marketplace financial reports
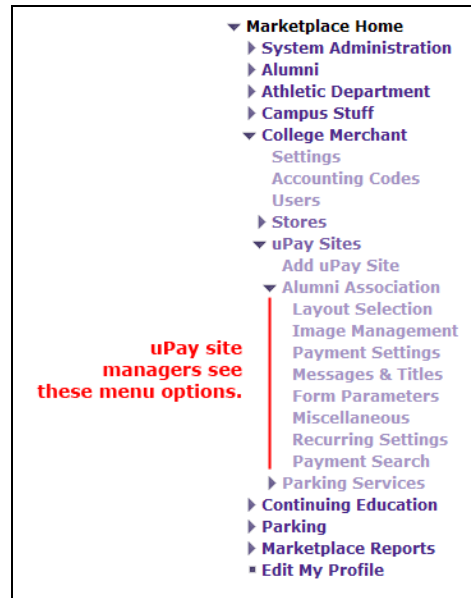
Users and Multiple Roles   Marketplace users can be assigned multiple user roles. For example, an administrator could assume the duties of a merchant manager by assigning himself as the merchant manager when he establishes a merchant. Likewise, a merchant manager could also assume the duties of a store manager by assigning himself as the store manager when he establishes a store. In this way, a single user could be responsible for an entire Marketplace web site, from administrative settings down to product options. Marketplace was designed so that user functions could be divided among multiple campus groups. However, Marketplace is also flexible enough that administrators and merchant managers can assume multiple roles as necessary.

2.2   Adding Administrative Users

Follow these steps to add another chief administrator, an administrator, or an accountant.

Note: Only chief administrators can add other chief administrators or administrators. Administrators can add accountants.

1   From the Control Menu, navigate to Marketplace Home > System Administration > User Settings > Users. The Marketplace Users by Role screen appears.

2   Click the Add New User link. The Add a New Marketplace User screen appears.

3   Complete the fields.

  • **Username**—The unique username you assign cannot be changed either by you or by the new user. Select a username that will be easy for the user to remember.

  • **Password**—The password must contain six to twenty alphanumeric characters. In addition, it must contain at least one number and one alphabetic character. You'll need to send the new user the username and password for the initial login, as well as the URL for the Operations Center. The new user should change the password you provide when they login.

  Note: Users cannot use their Operations Center username when shopping on the Marketplace site. They must create a new username.

  • **Assign Role**—The Assign Role dropdown menu allows you to choose which administrative role you want to assign. If you want to assign more than one role, choose an initial role here, then you can add more roles later. See "Changing Administrative and Merchant User Roles" on page 32 for details.

4   Click the Submit button.

2.3   Adding Merchants

In Marketplace parlance, a merchant is a department or other campus entity (such as a campus organization) that needs to process payments using a single, specified bank account (typically called a "host system account").

Marketplace's use of the term "merchant" allows stores and uPay sites to be grouped into a logical structure. Each merchant in Marketplace can have multiple stores and multiple uPay sites. Before you can create a Marketplace store, you must create a Marketplace merchant. Settings are associated with this merchant that affect its stores and uPay sites.

Follow these steps to add a Merchant. Remember, merchants are department-like entities, not people.

Note: Only chief administrators and administrators can add merchants.

1 From the Control Menu, navigate to Marketplace Home > System Administration > Merchants > Add New Merchant. The Add a New Marketplace Merchant screen appears.

Add Marketplace Merchant

If you create a new merchant manager user, notify that user of the login name and password for the first login.

Merchant Name:	
Payment Gateway Host System Account:	--- None ---
Default Return Check Fee:	$
Days fulfiller must wait before fulfilling orders paid via ACH. (Note: This wait period also applies to uPay refund requests.)	
ACH Agreement Text For uPay Sites:	I understand that payment(s) will be initiated once the order(s) has/have been submitted. I will be electronically notified when my order(s) has/have been fulfilled. I understand that I may be charged a non-sufficient funds (NSF) fee of $30.00 in the event any transaction agreed to in this "Authorization Agreement" is returned
Authorize Credit Card at Order Time:	☐
Days before re-authorizing credit card during fulfillment:	
Specify Merchant Manager	
Choose Existing User:	
- OR -	
Create New User:	
Merchant Manager's Username:	
Merchant Manager's Password:	
Confirm Password:	

Submit

2   Complete the fields.

- **Merchant Name**—This name is only used by the Operations Center. uStores shoppers and uPay customers will not see the merchant name.

- **Payment Gateway Host System Account**—This dropdown menu lists all the host system accounts that can be used by Marketplace merchants. A host system account represents a complete collection of the payment methods that are available for use by a Marketplace merchant. These payment methods are linked in Payment Gateway to merchant accounts (which contain financial information that is meaningful to credit card processors, ACH processors, and banks).

Important! Be sure you select the appropriate host system account when you add a merchant because this value cannot be changed after the

merchant is established. Contact your Payment Gateway administrator for information about which Payment Gateway host system account is appropriate for the merchant.

- **Default Return Check Fee**—This fee affects returned checks for ACH transactions.

- **Fulfiller must wait ____ days before fulfilling orders paid via ACH**—This wait period affects both purchases in uStores sites and refund requests in uPay sites.

- **ACH Agreement Text For uPay Sites**—This text contains the terms and conditions to which ACH payers must agree when using uPay sites. Make sure this text has been reviewed and approved by your institution and satisfies NACHA rules.

- **Authorize Credit Card at Order Time**—(uStores only) Use this option in order to encumber the customer's credit card at the time an order is submitted. By using this option, you determine if 1) the credit card information is valid and 2) sufficient funds are available.

- **Days before re-authorizing credit card during fulfillment**—(uStores only) This option is used in conjunction with the "Authorize Credit Card at Order Time" option. This option represents the number of days that must elapse before an order—that has not yet been fulfilled—is automatically re-authorized (i.e., re-encumbers the customer's credit card). This value is typically tied to the number of days that a credit card processor will allow a credit card to be encumbered, at which point this option can be used to automatically re-encumber the customer's credit card for the original amount. In most cases, the value used for the "Re-authorize credit card" option should be equal to the number of days that your credit card processor allows a credit card to be encumbered.

- **Choose Existing User**—When you set up a merchant, you must choose a merchant manager. You can either choose an existing user to serve as merchant manager or add a new user to serve in this role. All existing users appear in the Choose Existing User dropdown menu.

- **Merchant Manager's Username**—If you did not choose an existing user to serve as merchant manager, you can add a new user to serve in this role. The unique username you assign cannot be changed either by you or by the new user. Select a username that will be easy for the user to remember.

- **Merchant Manager's Password**—The password must contain six to twenty alphanumeric characters. In addition, it must contain at least one number and one alphabetic character. You'll need to

send the new user the username and password for the initial login, as well as the URL for the Operations Center. The new user should change the password you provide when they login.

Note: Users cannot use their Operations Center username when shopping on the Marketplace site. They must create a new username.

3   Click the Submit button.

2.4   Adding Merchant Managers

When you establish a merchant, you can either select an existing user to serve as the merchant manager or add a new user to serve in this role. In some situations, however, you will need to add a merchant manager after a merchant has already been created. In this case, follow these steps to add a merchant manager.

Note: Only chief administrators or administrators can add merchant managers.

1   From the Control Menu, navigate to Marketplace Home > System Administration > User Settings > Users. The Marketplace Users by Role screen appears.

2   Click the Add New User link. The following screen appears:

3   Complete the fields.

- **Username**—The unique username you assign cannot be changed either by you or by the new user. Select a username that will be easy for the user to remember.

- **Password**—The password must contain six to twenty alphanumeric characters. In addition, it must contain at least one number and one alphabetic character. You'll need to send the new user the username and password for the initial login, as well as the URL for the Operations Center. The new user should change the password you provide when they login.

Note: Users cannot use their Operations Center username when shopping on the Marketplace site. They must create a new username.

- **Assign Role**—The Assign Role dropdown menu allows you to choose which administrative role you want to assign. If you are assigning a merchant manager role, be sure to choose the associated merchant from the Merchant dropdown menu. If you want to assign more than one role, choose an initial role here, then you can add more roles later. See "Changing Administrative and Merchant User Roles" on page 32 for details.

- **Merchant**—The Assign Role dropdown menu allows you to choose which administrative role you want to assign. If you are assigning a merchant manager role, be sure to choose the associated merchant from the Merchant dropdown menu. If you want to assign more than one role, choose an initial role here, then you can add more roles later. See "Changing Administrative and Merchant User Roles" on page 32 for details.

  4   Click the Submit button.

2.5   Merchant Settings

After a merchant has been created, you can edit the merchant settings by following these steps.

  1   From the Control Menu, navigate to Marketplace Home > [merchant] > Settings. The Marketplace Merchant Settings screen appears.

Marketplace Merchant Settings

The return check fee is used for display only. The actual fee charged is configured in Payment Gateway. The ACH agreement is displayed for all ACH payments taken by this merchant, and users must agree to it.

Delete Merchant

Merchant Id:	16
Merchant Name:	Campus Stuff
Payment Gateway Host System Account Name:	Campus Stuff
Payment Gateway Host System Account ID:	31
Default Return Check Fee:	$ 30.00
Days fulfiller must wait before fulfilling orders paid via ACH. (Note: This wait period also applies to uPay refund requests.)	5
ACH Agreement Text For uPay Sites:	I understand that payment(s) will be initiated once the order(s) has/have been submitted. I will be electronically notified when my order(s) has/have been fulfilled. I understand that I may be charged a non-sufficient funds (NSF) fee of $30.00 in the event any transaction agreed to in this "Authorization Agreement" is returned from the account holder's financial institution as NSF.
Authorize Credit Card at Order Time:	⊙ Yes ○ No
Days before re-authorizing credit card during fulfillment:	5

Save

2 You can edit the following fields.

- **Merchant Name**—This name is only used by the Operations Center. uStores shoppers and uPay customers will not see the merchant name.

- **Default Return Check Fee**—This fee affects returned checks for ACH transactions.

- **Fulfiller must wait ____ days before fulfilling orders paid via ACH**—This wait period affects both purchases in uStores sites and refund requests in uPay sites.

- **ACH Agreement Text For uPay Sites**—This text contains the terms and conditions to which ACH payers must agree when using uPay sites. Make sure this text has been reviewed and approved by your institution and satisfies NACHA rules.

- **Automatically Authorize Shipment Payments**—Applies to credit card payments. Use this option in order to encumber the customer's credit card at the time an order is submitted. By using this option, you determine if 1) the credit card information is valid and 2) sufficient funds are available. In addition, if auto authoization fails, the customer finds out immediately during the

checkout process and can then re-examine the credit card information that they entered, thus reducing the opportunity for entry errors.

* **Re-Authorization Days**—This option is used in conjunction with Automatically Authorize Shipment Payments. This option represents the number of days that must elapse before an order is automatically re-authorized (i.e., re-encumbers the customer's credit card) during the fulfillment process. This value is typically tied to the number of days that a credit card processor will allow a credit card to be encumbered. In most cases, the value used for Re-Authorization Days should be equal to the number of days that your credit card processor allows a credit card to be encumbered.

3   Click the Save button.

Note: The Payment Gateway Host System Account Information displayed on the Marketplace Merchant Settings screen is for informational purposes only. You cannot change the host system account linked to a merchant.

2.6   Deleting a Merchant

After a merchant has been created, you can edit the merchant settings by following these steps.

1   From the Control Menu, navigate to Marketplace Home > [merchant] > Settings. The Marketplace Merchant Settings screen appears.

2   Click the Delete Merchant button. When you click the Delete Merchant button, a prompt appears that says "You are about to delete this merchant. Okay to continue?"

3   Click OK. The merchant has been removed from Marketplace and is no longer available. The corresponding merchant link in the control menu has also been removed.

Important! When you delete a merchant, any associated stores, products, and uPay sites will also be deleted. Before you delete a merchant, you should always review the merchant and ensure that its entire contents can be deleted.

2.7   Changing Administrative and Merchant User Roles

After users have been created and assigned roles, you can make changes to the roles that have been assigned. However, when you make changes to roles, you should keep the following two points in mind:

- Always notify users when you change their roles.

- After a user's roles have been changed, the user must log out and log back in to see any changes in the Operations Center.

Note: Each user can have multiple roles. For example, a merchant manager can also be an administrator or an accountant. Each merchant manager can manage multiple merchants.

Follow these steps to edit user roles for chief administrators, administrators, accountants, and merchant managers.

1   From the Control Menu, navigate to Marketplace Home > System Administration > User Settings > Users. The Marketplace User Settings screen appears.

2   Click the Edit User link to the right of the person you want to edit roles for. The following screen appears:

3   To remove a role, click the Remove check box for that role. To add a role, click the Add checkbox for that role.

4   Click the Save Changes button.

Part 3:

Building and Managing uStores

3.0 uStores: An Overview

The uStores features of TouchNet Marketplace allow you to set up online stores and track your sales and item fulfillment. Your uStores site is a collection of online stores. Each store is managed separately but with centralized payment processing and reporting.

3.1 How a uStores Site is Built

System-level uStores setup helps determine the look of your site and how users will shop there. Administrators can perform uStores setup any time, but they must create a merchant before a merchant manager can add a store.

The other important uStores setting that the administrator must complete is the setup of delivery methods. Delivery methods must be set before products can be added to a store.

After a store has been added, the merchant manager or store manager can work on the store's features and start adding products. Then, that user brings the store online.

3.2 Planning Ahead for uStores

Administrators completing the global setup of your uStores site may find they need to make decisions as they move through the fields and options in the Operations Center.

Although you don't need to figure out all the details before you start filling in your site's options, here's an overview of information and answers an administrator may need when beginning uStores setup.

uStores Planning Summary for Global Administrative Setup

Shopping Site Basics		
	1	What shopping site name should appear in e-mails to buyers?
	2	Do we want to display links to categories on the home page?
	3	Do we want shoppers to be in secure mode while browsing products?
	4	Do we want shoppers to securely save their payment information and shipping address information for use in repeat visits?
	5	Who is the site's default e-mail contact for shoppers, in case there is no e-mail contact in a store?
Graphics	**6**	What should we use as our home page splash graphic?
	7	What URL will we link to from our logo, if any?
	8	Do we need standard graphics available for stores to use?
	9	Who is going to create the graphics/images we need for our store?
Categories	**10**	Will we use category links on the shopping site's home page?
Delivery Methods	**11**	What major carriers and delivery services do we want stores to have the option of using for shipping?
	12	Do we have centrally recommended shipping rates for each delivery method that we want all stores to charge?

uStores Planning Summary for Global Administrative Setup

Taxes	**13** Are different levels of taxes charged on different types of products in our locale?
	14 Should store managers charge the default tax rate, or will they need to know when to charge no tax?
General Ledger (GL) Codes (if general ledger features are used at your school)	**15** What general ledger codes should be used to track revenue?
	16 What general ledger codes should be used for tracking revenue from taxes?
	17 Will the store use "global" general ledger codes (which were created by a Marketplace administrator for use by all Marketplace stores) or will the store create its own codes?

3.3   Viewing the uStores Web Site

As you use the Marketplace Operations Center to create stores, categories, and products, you'll want to view the results of your work by looking at the shopping application. In uStores, you'll see store pages, category pages, and product pages.

The URL for uStores was determined when Marketplace was installed. The URL for the uStores home page uses the following format:

http://[server]/[context]/web/index.jsp

[server] is the computer where uStores was installed, and [context] is the context path. The default value of [context] is **ustores**. If you do not know the server name or the context path, you should contact your Marketplace administrator.

When you use the uStores URL, the uStores site home page loads in your browser, as illustrated in the following example.

For your implementation of Marketplace, the home page will be customized with your site logo in the title bar, your splash page image, and your set of categories and stores. These customizations are created during the uStores system-level setup. For more information about these customizations, see "uStores System-Level Setup" on page 39.

4.0   uStores System-Level Setup

TouchNet Marketplace gives you a vast and varied tool set for your online uStores shopping site. Navigation to products, use of graphics, the amount of information displayed at each point in the site—all are under your control.

This section will help you move quickly through the system-level setup used by stores. This setup must be completed by an administrator user.

Complete these settings before you bring any part of your site online. Later, and over time, you can return to each setup choice and fine-tune your ideas.

A Note to Users of General Ledger Systems

If you'll be transferring data from Marketplace to a general ledger (GL) system, you have special setup fields and tasks. In particular, you must set up the account codes for tax revenue before store managers can finish adding products. In this section, we describe the general ledger fields you'll encounter during setup. See "General Ledger Information" on page 281 for the basics of general ledger setup.

A Note to Those Not Using General Ledger Systems

Many of the examples and pictures in this section show the general ledger fields. If you aren't using a general ledger system with Marketplace, you will still see Marketplace's generic general ledger fields in the Operations Center. You can simply disregard these fields.

4.1   System Administration Settings and Tasks

To start setting up your uStores site, navigate to Marketplace Home > System Administration > Settings.

General Settings

Like most options in your uStores site, the System Administration settings can be changed easily whenever you want.

Although you can go on to some other parts of setup without selecting your general site features, you will have a better idea of your site's total design if you make initial choices, then change them as needed while you build the site.

Note: Only an administrator can change the settings described in this section.

To view the General System Settings page, make the following selections in the control menu:

Navigate to Marketplace Home > System Administration > Settings > General.

▾ **Marketplace Home**
  ▾ **System Administration**
    ▾ **Settings**
      General
      Images
      Categories
      ▸ Delivery Settings
      Accounting Codes
      Tax Account Codes
      Store Listing Order
      Digital Files
      Cache Settings
      System Integration Map
      Site Connection Details
    ▸ User Settings
    ▸ Merchants
  ▸ **Alumni**
  ▸ **Athletic Department**
  ▸ **Campus Stuff**
  ▸ **College Merchant**
  ▸ **Continuing Education**
  ▸ **Parking**
  ▸ **Marketplace Reports**
    Edit My Profile

uStores System Administration General Settings page

Complete the following fields:

Shopping site name

Buyers see this name in the automatically generated order confirmation e-mail and in the online "Thank you for shopping" message.

Special announcement for shoppers

This message appears on your uStores site's home page. You may want to plan your special announcements around individual stores, promotions, products, or seasonal advertising.

You can enter up to 500 characters in this field, including selected HTML tags. By using HTML, you can change the appearance of the special announcement. However, we recommend you become proficient in

authoring HTML before you attempt to add HTML tags to the Special Announcement field.

You can include the following HTML tags:

```
<p></p>
<h1></h1>
<h2></h2>
<h3></h3>
<h4></h4>
<h5></h5>
<h6></h6>
<font></font>
<b></b>
<strong></strong>
<i></i>
<em></em>
<br/>
<a></a>
<ol></ol>
<ul></ul>
<li></li>
<hr/>
<sub></sub>
<sup></sup>
<table></table>
<td></td>
<tr></tr>
<style/>
<link/>
<div></div>
<span></span>
<img/>
```

Only the above HTML tags will be recognized by Marketplace. If you place any HTML tags not listed above in the Special Announcement for Shoppers field and attempt to save the entry, the Marketplace Operations Center will display an error message.

Important! If you enter improperly formatted HTML in the Special Announcement for Shoppers field, the Marketplace shopping application may be prevented from displaying properly. You must ensure that any HTML entered in this field is formatted correctly.

Text for uStores ACH agreement

This text contains the terms and conditions to which ACH payers must agree when making purchases from uStores sites. Make sure this text has been reviewed and approved by your institution and satisfies NACHA rules.

Display uStores categories to shoppers

If you check this box, shoppers will see links from your home page to all site categories. Base this decision on your evaluation of shoppers' use of the site, and on how you want shoppers to use the site. Clear the box if you want to link only to stores from the home page.

"Checkout and My Account pages are secure" and "Shopping pages are secure"

These checkboxes set the point when your shoppers switch to secure mode while shopping. You can check either or both boxes. TouchNet strongly recommends that you always provide security on the checkout and My Account pages.

If you check the "Checkout and My Account pages are secure" box, shoppers enter secure pages whenever they check out or view their account information. This provides security on personal and payment information.

If you check the "Shopping pages are secure" box, shoppers enter secure pages as soon as they begin to browse in stores or categories. This provides security on all of the shopper's browsing, but will slow site performance for the shopper.

Note: For some secure pages to work, your web server must have a valid SSL certificate installed.

Note: For Marketplace installations in the TouchNet DataCenter, these two options must both be selected.

"Allow buyer to save payment methods" and "Allow buyer to save shipping addresses"

If these boxes are checked, shoppers will be advised during checkout that they can save profile information. Shoppers will also see the profile options in the "My Account" page. If a box is cleared, however, the option to save that kind of profile is never shown to the shopper.

If saving payment methods is enabled, shoppers can save payment information for use in future visits. For example, a shopper might save a credit card number and expiration date under the payment method name "My Credit Card."

Or, if saving shipping addresses is enabled, a shopper can save multiple addresses, then choose the desired shipping address during checkout. Shoppers are never required to save any addresses, but if they do, the information is secure.

Show total number of reachable, orderable products next to Category links

Showing the number of products available can help shoppers choose which category to browse first.

To show shoppers how many orderable products are nested within a category and its subcategories, check this box. The number will appear on links everywhere except the site's home page.

If you don't want to show the number, leave the box clear.

Default contact e-mail address for the site

In stores, shoppers see a link named "Send us e-mail." If the store manager has not chosen a contact person for the store, e-mail messages will go to the default address for the uStores site. If the e-mail contact address has not been established at either the store or administration level, then the "Send us e-mail" link is not displayed.

The person whose address you list here might receive e-mail from shoppers about individual stores or products as well as about the site itself. If you want all shopper e-mail to go to this address, ask your store managers not to list a contact for their stores. Be sure to keep this address current.

Default state/Province

During checkout, a buyer enters shipping and billing addresses. The buyer selects the correct state from a drop-down list. The default state for address entry will typically be your home state, from which items are shipped.

Default country

As with the Default State/Province field, the Default Country field establishes the default country that appears when a buyer enters the shipping and billing addresses.

Host system

This field is displayed for informational purposes only. This value cannot be changed. It was established during Payment Gateway setup.

Allow products to be purchased with departmental charge

(Banner only) When set to Yes, "departmental charge" is available for stores to use as a payment method when configuring products. The departmental charge payment method can only be used to transfer budget funds between Banner general ledger accounts. The buyer's general ledger account will be charged for items purchased through that store. The buyer must enter a Banner detail code during the checkout process in order to complete the transaction. For more information about using the departmental charge option, see the *Banner Setup Guide for Marketplace*.

Payment Gateway user defined payment method ID for departmental charge

(Banner only) In order for "departmental charge" to be used, configuration in Payment Gateway must first take place: a user-defined payment method

must be created. The ID for this user-defined payment method must then be recorded in this field.

Images

To choose images for your uStores site, follow these steps.

1   Navigate to Marketplace Home > System Administration > Settings > Images.

The Image Settings page opens (shown below).

Note: Only an administrator can upload uStores site-level images.

```
▼ Marketplace Home
  ▼ System Administration
    ▼ Settings
        General
      ▪ Images
        Categories
      ▶ Delivery Settings
        Accounting Codes
        Tax Account Codes
        Store Listing Order
        Digital Files
        Cache Settings
        System Integration Map
        Site Connection Details
    ▶ User Settings
    ▶ Merchants
  ▶ Alumni
  ▶ Athletic Department
  ▶ Campus Stuff
  ▶ College Merchant
  ▶ Continuing Education
  ▶ Parking
  ▶ Marketplace Reports
    Edit My Profile
```

uStores System Administration Image Settings page

2   In the Splash Image section, click the "Upload Splash Image" link. A pop-up Image Upload box opens.

   Note: The splash image will appear on the Marketplace uStores home page.

3   Browse to your image file, select the file, and then click the Upload Now button.

4   In the Logo Image section, click the "Upload Logo Image" link. A pop-up Image Upload box opens.

   Note: The logo image will appear at the top of all Marketplace uStores pages.

5   Browse to your image file, select the file, and then click the Upload Now button.

6 (Optional) In the "You can specify a URL to which the logo image links" section, you can specify a URL for your logo image and the alternate text that should appear when the shopper passes the cursor over the logo.

If you enter a URL here, your logo becomes a link to another web page—for instance, your campus home page. Enter the full URL, beginning with http://. If you leave the field empty, your logo will be a static image (not a broken link).

If you use a URL, be sure to enter the alternate text, which aids users who have visual impairments.

7 Click the Save button.

Image Specifications

- You can only use GIF, JPG, or PNG format images.

- Splash images are best displayed at a pixel size of 530 (width) x 280 (height).

- Logo images are best displayed at a pixel size of 269 (width) x 75 (height).

- All images must have file sizes of 250K or less.

Categories

uStores categories (created at the system-administration level) contain products from all stores, not just from one store.

If you chose in your general settings to display category links, then store managers can showcase products within a single click of the shopping site's home page.

Use categories if they will help the buyer find products faster. If several stores stock the same types of products—for instance, logo wear—a single category on the home page will help shoppers find all those products in the site.

Note: Only an administrator can set up uStores categories.

To set up system-level categories, follow these steps.

1 Navigate to Marketplace Home > System Administration > Settings > Categories. The Category Settings page opens.

▼ **Marketplace Home**
  ▼ **System Administration**
    ▼ **Settings**
      General
      Images
      ▪ Categories
      ▶ Delivery Settings
      Accounting Codes
      Tax Account Codes
      Store Listing Order
      Digital Files
      Cache Settings
      System Integration Map
      Site Connection Details
    ▶ User Settings
    ▶ Merchants
  ▶ **Alumni**
  ▶ **Athletic Department**
  ▶ **Campus Stuff**
  ▶ **College Merchant**
  ▶ **Continuing Education**
  ▶ **Parking**
  ▶ **Marketplace Reports**
    Edit My Profile

The uStores Category Settings page

2   Click the Add Top-Level Category link. Or, if you already have top-level categories and want to add subcategories under them, click the Add Sub-Level Category link. The Category Management pop-up opens.

3   Enter your category or subcategory name.

4   Select a product layout. (For details on product layouts, see "Choosing Product Layouts" below.)

5   Click Save.

Choosing Product Layouts

The category's product layout determines how shoppers view the list of products. Choose the best layout for each category and its products. To choose a product layout, think about the kinds of products and how many products are in the category.

- **Name and Price**. The shopper sees product names and prices. This layout works well when products don't have images, or when the category contains many products. With the Name and Price layout, shoppers won't have to scroll as far through a long product list.

- **Thumbnail Layout**. The shopper sees product thumbnail images and names. This layout works well for many product groupings. Products appear from left to right in rows on the page.

- **Detailed Layout**. The shopper sees product thumbnail images, short descriptions, names, and prices. This layout works well for categories that don't contain many products, or when you want to quickly advertise more information about the products in a category. The shopper scrolls down the page to see each detailed product listing.

Adding Category Graphics and Changing Category Features

To add or change category graphics and edit other category setup:

1   Go to Marketplace Home > System Administration > Settings > Categories.

2   Click the Edit link for the category you want to set up. The Edit Category Settings page opens.

This page contains fields for the Category Name, the Product Layout selection, and the Category Logo.

Note: For sub-categories, the Parent Category field also appears on this page, as well as the Category Thumbnail upload option.

3 Change the category name or product layout as needed.

4 If you would like to add a Category Logo to this category, click the Upload Logo Image button, browse to your image file, and then click the Upload Now button..

Note: uStores customers will see this logo. The category logo image appears at the left side of the uStores category pages.

5 If you would like to add a Category Thumbnail to this category, click the Upload Thumbnail Image button, browse to your image file, and then click the Upload Now button.

Note: The thumbnail image appears beside the category name in lists of subcategories. (Thumbnail images are not used with top-level category names.)

Image Specifications

When you design and save your category logo and thumbnail images, keep these limits in mind:

- You can only use GIF, JPG, or PNG format images.

- Category logos are best displayed at a width by height of 150 x 300 pixels.

- Category thumbnails are best displayed at 80 x 80 pixels.

- All images must have file sizes of 250K or less.

Category Design Tips

- Check with Store Managers to hear what category choices would help them most. Also, tell Store Managers when system-level categories are added or changed so they can make sure products are in the right categories.

- If a category is empty, shoppers won't see its link in the site. You can add empty categories while you are figuring out the best structure for your site, then remove unused categories later.

- Avoid giving a category the same name as a store. If category names and store names are the same, navigation may be confusing for shoppers.

- Category layout can improve navigation. For example, a category that includes products with no images might require the Name and Price layout.

- Changes to categories are visible to online shoppers immediately. (New categories become visible when products are placed in them.) If your changes can affect shopping in progress, you may want to take the store or site offline while you update category structure.

Manage the Category Listing Order

By default, subcategories are shown in alphabetic order to the shopper. You can enter a specific order for any list of subcategories. Top-level categories are always shown in alphabetic order.

To change the listing order:

1 Go to Marketplace Home > System Administration > Settings > Categories, and click the Manage Category Listing Order link.

2 Enter a two-digit "sort key" value for each category.

Note: For numbers 1 through 9, use a leading zero (01, 02, 03, and so on). This ensures the listing order will be correct.

3 Click the Save button.

Note: If you leave a sort key empty, Marketplace will show the sorted categories first, followed by the rest of the categories in alphabetic order.

Managing the Category Listing Order with sort order keys

Deleting a Category

In the Mall Categories page, you can click an empty category's Delete link to remove it. Over time, you may find that some categories do not help the shopper as much as others. You may need to delete some categories as you add others.

You can't delete a category unless it and all its subcategories are empty. You must ask Store Managers to move products out of a category before you can delete it.

Linking to a Site Category

To link directly to a specific site-level category, you should navigate to the shopping application (uStores) and then open the category page that you wish to link to. Copy the URL displayed in your browser's address field.

The URL for the uStores home page uses the following format:

> http://[server]/[context]/web/category.jsp?CATID=[category ID#]

[server] is the computer where uStores was installed, and [context] is the context path. [category ID#] is the category ID assigned by Marketplace. This ID value can only be determined by viewing the category page in the shopping application.

Note: Do not include bracket characters in the URL.

Delivery Methods

Delivery methods must be recorded in Marketplace to match the physical delivery methods that will be offered by stores. Each delivery method (US First-Class Mail, US Express Mail, UPS Ground, etc.) must be created at the system administration level. For example, if a store needs US Express Mail to be available to customers as a delivery method, this delivery method must first be entered in Marketplace at the system administration level.

The system administrator(s) needs to determine all the delivery methods that will be used by the stores and then create entries for these shipping methods in Marketplace. For instance, will any store ship by US Priority Mail or UPS Next Day Air? If so, the system administrator(s) will need to add these delivery methods to Marketplace.

▼ **Marketplace Home**
  ▼ **System Administration**
    ▼ **Settings**
      General
      Images
      Categories
      ▼ **Delivery Settings**
        Delivery Methods
      Accounting Codes
      Tax Account Codes
      Store Listing Order
      Digital Files
      Cache Settings
      System Integration Map
      Site Connection Details
    ▶ **User Settings**
    ▶ **Merchants**
  ▶ **Alumni**
  ▶ **Athletic Department**
  ▶ **Campus Stuff**
  ▶ **College Merchant**
  ▶ **Continuing Education**
  ▶ **Parking**
  ▶ **Marketplace Reports**
  Edit My Profile

Three delivery methods—None, Walk-In, and US Mail—are "pre-populated" for you during Marketplace setup.

Note: Only an administrator can add or remove delivery methods.

Using the uStores Delivery Methods Page

The uStores Delivery Methods page allows you to create and manage delivery methods. Once you create delivery methods, these methods are available for products.

Use the following steps to add new delivery methods:

1   In the Control Menu, go to Marketplace Home > System Administration > Settings > Delivery Settings > Delivery Methods. The uStores Delivery Methods page appears.

uStores Delivery Methods

The delivery methods defined here are available to all Marketplace stores. Products cannot be added to stores unless delivery methods have first been added. Enter the complete delivery method name. For example, enter "FedEx Express Saver", not "FedEx" or "Express Saver".

Add Delivery Method

Description	Actions	
None	Edit	Delete
Walk-In	Edit	Delete
US Mail	Edit	Delete
International	Edit	Delete
UPS	Edit	Delete
FedEx Ground	Edit	Delete

2   Click the Add Delivery Method link. The Marketplace Delivery Methods pop-up window appears.

3   Enter a name for the delivery method. This name will appear as a delivery option when store managers and store clerks are creating and editing products. This name will also appear for uStores customers. The name should include both the delivery service name and the delivery method (e.g., UPS Next Day Air, US Express Mail, etc.).

4   Click the OK button.

Tip on Delivery Methods

Be as specific as you can. If a commercial service offers both overnight shipping and two-day shipping, add both as delivery methods. That way, store managers can charge different rates for the two types of shipping.

Editing Delivery Methods

In the uStores Delivery Methods page, you can click the Edit link to edit an existing delivery method. When you click the Edit link, the Marketplace Delivery Methods pop-up window appears. You can then rename the delivery method.

When you rename a delivery method, store managers will see the change in their shipping classes, and uStores customers will also see the new name during the checkout process.

Important! Because store managers may be using the delivery method in their shipping classes, always notify store managers before editing a delivery method.

Deleting Delivery Methods

In the uStores Delivery Methods page, you can click the Delete link to delete a delivery method.

When you delete a delivery method, the delivery method will be removed from all existing shipping classes created for stores. As a result, uStores customers will no longer see this delivery method offered during the checkout process.

Important! Because store managers may be using the delivery method in their shipping classes, always notify store managers before deleting a delivery method.
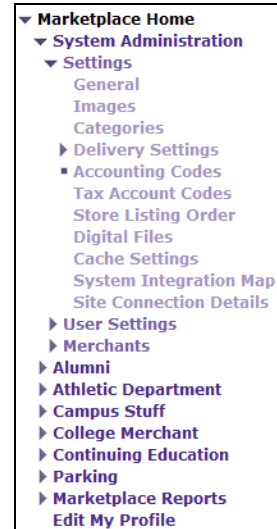

Accounting Codes

If you use general ledger options, you can create accounting codes in Marketplace that correspond to the accounting codes in your general ledger system.

For instance, administrators can create accounting codes for each tax class. This will allow you to transfer tax revenue information to the general ledger system.

The codes you create will appear in accounting code and tax account code selections.

Note: Administrators and merchant managers both create accounting codes. Administrators create the codes to be used for tax classes. Merchant managers create the codes to use in credit code selection for products and shipping methods. When a merchant manager creates an accounting code, it is used only by that merchant's uStore and uPay sites.

Marketplace navigation menu:

- ▼ **Marketplace Home**
  - ▼ **System Administration**
    - ▼ **Settings**
      - General
      - Images
      - Categories
      - ▶ Delivery Settings
      - ▪ Accounting Codes
      - Tax Account Codes
      - Store Listing Order
      - Digital Files
      - Cache Settings
      - System Integration Map
      - Site Connection Details
    - ▶ **User Settings**
    - ▶ **Merchants**
  - ▶ **Alumni**
  - ▶ **Athletic Department**
  - ▶ **Campus Stuff**
  - ▶ **College Merchant**
  - ▶ **Continuing Education**
  - ▶ **Parking**
  - ▶ **Marketplace Reports**
  - Edit My Profile

Adding Accounting Codes as an Administrator

In the Control Menu, go to Marketplace Home > System Administration > Settings > Accounting Codes. The uStores Common Accounting Codes screen opens.

uStores Common Accounting Codes

Common accounting codes are available to all Marketplace merchants. Merchant managers can choose to use these common codes within their store or UPay site or create their own.

Add Common Accounting Code

Name	In Use?	Actions	
College_Digital Downloads	No	Edit	Delete
GL_College Marketplace	Yes	Edit	Delete
Tax	Yes	Edit	Delete

Show Merchant Accounting Codes

1   Click the Add New Common Accounting Code link.

2   In the Accounting Code field, enter the account code used in your general ledger system.

3   In the Accounting Code Name field, enter the name to display in Marketplace. The name will appear in the selection list of codes. You

may want to assign a name that reminds Marketplace users what the code is for.

4   Click the Add button.

Editing Accounting Codes as an Administrator

1   In the Control Menu, go to Marketplace Home > System Administration > Settings > Accounting Codes. The uStores Common Accounting Codes screen opens.

2   Click the Edit button for any code in the list.

3   Update the Accounting Code or the Accounting Code Name fields as needed.

4   Click the Save button.

Viewing Merchant Accounting Codes as an Administrator

1   In the Control Menu, go to Marketplace Home > System Administration > Settings > Accounting Codes. The Common Accounting Codes screen opens.

2   Select the Show Merchant Account Codes link. The page is then updated to include a list of all the merchants and the accounting codes that they are using.
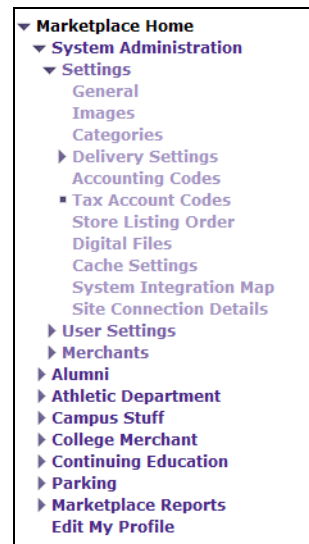
Tax Account Codes

Tax classes determine the tax rates charged for products and shipping. Tax classes are set up outside the Operations Center. For setup details, see "About Tax Rates" and "Changing Tax Rates" below.

If you use general ledger options, each tax class can be assigned one of the accounting codes you have created. This code is used to transfer tax revenue information to the general ledger system.

The available codes are set up in the Accounting Codes options. (See "Accounting Codes" on page 55.)

For other details, see "General Ledger Information" on page 281.

▾ **Marketplace Home**
  ▾ **System Administration**
    ▾ **Settings**
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        Accounting Codes
      ▪ Tax Account Codes
        Store Listing Order
        Digital Files
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  ▸ **Campus Stuff**
  ▸ **College Merchant**
  ▸ **Continuing Education**
  ▸ **Parking**
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Note: Only an administrator can assign a tax account code.

To assign a tax account code:

1 In the Control Menu, go to Marketplace Home > System Administration > Settings > Tax Account Codes. The Tax Account Codes screen opens.

Tax Class Id	Tax Class Name	Accounting Code
0	no tax	Tax
1	default tax rate	Tax
2	higher tax rate	Tax

uStores Tax Account Codes

If you use general ledger (GL) integration, select an accounting code for each tax class.

Save   Reset

2 For each tax class, select the accounting code from its dropdown list.

3 Click the Save Changes button.

About Tax Rates

A tax class determines the tax rate charged for a purchased product or on shipping. Marketplace includes three tax classes: no tax, default tax rate, and higher tax rate. Many implementations use only the "no tax" and "default tax rate" classes, but the "higher tax rate" class is available for jurisdictions that require higher tax rates on specific items.

Store managers decide which tax rate to charge for each product, and the administrator sets the tax rates in Marketplace files. This is done outside the Operations Center.

You should explain the tax rates and any local taxation issues to new store managers. Store managers will need to know how much tax to charge on both products and shipping.

Changing Tax Rates

Two Marketplace files contain information that is used to calculate the applicable sales tax for each customer: *city_county.dat* and *taxrates.dat*. These files were set up during Marketplace implementation and are located in the *touchnet\marketplace50\sys\tmstax\data* directory.

The *city_county.dat* file simply associates each city in the state with its county. This information is used by Marketplace when customers enter their

city name during the checkout process: Marketplace determines the city/ county relationship as indicated in the *city_county.dat* and then calculates the appropriate tax rate using the corresponding city/county/state tax data contained in the *taxrates.dat* file.

A default tax rate for the state can be set up. Exceptions for different cities and counties within the state can be added as needed.

When tax information changes for your state or for locales within your state, update the tax rates in the *taxrates.dat* file. Use the following steps to edit the *taxrates.dat* file.

1　Use a text editor to open the *taxrates.dat* file.

2　Locate the state, county, or city entry for which the tax rate has changed. Entries for cities follow this format:

```
|STATE|County|City|lower tax rate|higher tax rate
```
An entry for an entire county follows this format:

```
|STATE|County||lower tax rate|higher tax rate
```
For a county-wide tax rate, leave the city field empty. Do not remove the extra vertical pipe character that divides the county name from the space for the city name.

An entry for an entire state follows this format:

```
|STATE|||lower tax rate|higher tax rate
```

For a state-wide tax rate, leave the county and city fields empty. Do not remove the extra vertical pipe characters that divide the state/ county/city fields.

Note: When making an entry for a city, be sure to include the name of the county also or the tax rate will be computed at the default state tax rate.

3　For each locale where tax has changed, enter the correct rates. Tax rates include state sales tax plus any applicable local sales tax. You may enter up to two tax rates.

- If a locale uses two tax rates, enter the lower of the tax rates first, followed by the higher tax rate.

- If a locale uses only one tax rate, enter the same rate in both tax rate fields.

- If a locale charges no tax, enter 0.0.

Example 1　In this example, the county of Albany charges 4% tax at the lower rate and 8% tax at the higher rate.

```
|NY|Albany||0.04|0.08
```

4　Save and close the file.

5 Restart the TMStax module so that the changes take effect.

Example 2 If the default tax rate for the entire state is 6.5%, the *taxrates.dat* file will include this line:

```
|NY|||0.65|0.65
```

If the county of Albany has a different tax rate (say, 7.25%), then you would add another line to *taxrates.dat* as follows:

```
|NY|Albany||0.0725|0.0725
```

If the city of Altamont (in Albany county) has a different tax rate (say, 7.75%), then you would add another line to *taxrates.dat* as follows:

```
|NY|Albany|Altamont|0.0775|0.0775
```

Store Listing Order

The store listing order sets the order for stores to be listed on the Marketplace shopping home page.

To change the order in which stores are listed:

1 In the Control Menu, go to Marketplace Home > System Administration > Settings > Store Listing Order. The Store Listing Order screen opens.

Marketplace Store Listing Order

By default, Marketplace lists stores in alphabetical order. To change the store listing order, enter two-digit numbers (01, 02, 03, etc.) in the Sort Key field for each store.

Store Name	Sort Key
College Store	02
Athletics	04
Continuing Education	05
Advancement	
Alumni Memberships	
Campus Books	
Campus Events	
Campus Parking Permits	
Campus Wear	
Online Giving	

Save **Reset**

2 In the Sort Key column, use two-digit numbers to show the order you want the categories to appear.

Note: For numbers 1 through 9, use a leading zero (01, 02, 03, and so on). This ensures the listing order will be correct.

In the example above, the Campus Gifts store would be listed first on the home page, followed by the Alumni Store, Athletic Department, and Continuing Education, in that order.

3 Click the Save Changes button.

Digital File Settings

The Marketplace Digital File Settings page displays digital file size allocations and allows administrators to edit the allocation for each store. In addition, the maximum file size limitation can be set.

Administrators can view the Digital File Settings page by making the following selections in the ControlMenu: Marketplace Home > System Administration > Settings >Digital Files.

The Total Size Available for Digital Files field at the top of the page displays the total space available for all digital products in all stores. The total file space for digital files is determined by the *critical.prp* file. By default, this value is set at 1,000,000,000 bytes (1 GB). If you would like to change this limit, you must edit the *critical.prp* file. See the *Marketplace 5.0 Set Up Guide* for more information editing the *critical.prp* file.

Note: The unit of measure is bytes for all file size and allocation limits displayed on the Marketplace Digital File Settings page.

Important! TouchNet DataCenter customers must contact their TouchNet Client Services specialist if they would like to change the amount of server space allocated for digital files.

In order for a store to use digital products, the administrator must designate a file space allocation for the store by entering a percentage in the "% of Total File Allocation" field. If a store reaches or exceeds its allocation, then no additional digital products can be added to the store.

Note: If a store needs additional file space for digital products, the merchant or store manager must contact the Marketplace administrator about changing the file space allocation percentage.

Field Definitions:

Total Amount Used By All Stores

The total amount currently used by all the Marketplace stores. This figure is a sum of all the values in the "Size of Files" column.

Percent Allocated to Stores

The sum of all the values in the "% of Total File Allocation" column. This value can be less than 100%, but it cannot exceed 100%.

Maximum File Size

The maximum allowed size for each digital file. This value can be changed by a Marketplace administrator.

% of Total File Allocation

Percent of "Total Size Available for Digital Files" that is available to an individual store.

Size of Files

The total size of all digital files that have been added to an individual store.

Total Allocated For Store Use

The total amount of server space that is available to an individual store for digital files.

To change the maximum file size:

1   In the Control Menu, go to Marketplace Home > System Administration > Settings > Digital Files. The Marketplace Digital File Settings page opens.

2   Edit the value in the Maximum File Size field as necessary.

3   Click the Save Change button.

To change the percent of total file allocation for one or more stores:

1   In the Control Menu, go to Marketplace Home > System Administration > Settings > Digital Files. The Marketplace Digital File Settings page opens.

2   For each store, edit the value in the% of Total File Allocation field as necessary.

3   Click the Save Changes button at the bottom of the page.

Cache Settings

Marketplace keeps information in memory about a number of products and articles.

An article (or SKU) is a particular variety of a product, for example, a product in a particular size or color.

The product and article cache sizes determine the number of products and articles for which Marketplace will store information in memory.

If a buyer browses to a product or article available in the cache, Marketplace can retrieve this information from memory rather than from the database.

Products and articles that are frequently viewed by buyers are more likely to be available from

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  ▶ **Marketplace Reports**
  Edit My Profile

this cache, decreasing the time required for a buyer to view information about a popular selection.

The Cache Statistics page in the Marketplace Operations Center allows an administrator to see and change the values for cache sizes.

You can also see a variety of statistics that will help you assess whether to increase or decrease your cache sizes.

Note: Only an administrator can change cache sizes.

To change cache sizes:

1   In the Control Menu, go to Marketplace Home > System Administration > Settings > Cache Settings. The Cache settings page opens (shown below).

2   Enter a new size as needed for either the product or the article cache, then click the Update button.

uStores Cache Settings

Cache sizes are the number of products and articles that uStores retains in memory. If shoppers browse to something in the cache, it will be retrieved from memory instead of the database.

Refresh Statistics

uStores Location:http://172.16.20.10:8080/ustores/	
Maximum Cache Size	1000
# of Products in Cache	0
Total # of Requests	0
# of Cache Hits	0
# of Cache Misses	0
# of Cache Removals	0
Cache Hit Ratio	n/a

New Maximum Product Cache Size:*	

* Note: Changes to the maximum cache size will take effect immediately. However, there will be a temporary performance degradation while browsing in uStores because the cache must be cleared before it is resized.

Update Product Cache

Article Cache

uStores Location:http://172.16.20.10:8080/ustores/	
Maximum Cache Size	200
# of Articles in Cache	0
Total # of Requests	0
# of Cache Hits	0
# of Cache Misses	0
# of Cache Removals	0
Cache Hit Ratio	n/a

New Maximum Article Cache Size:*	

* Note: Changes to the maximum cache size will take effect immediately. However, there will be a temporary performance degradation while browsing in uStores because the cache must be cleared before it is resized.

Update Article Cache

Understanding Cache Statistics

Cache statistics alone do not provide a complete picture of the efficiency of your shopping site. They provide one way to assess how quickly your buyers are able to view products or articles, and they may also provide some insight to the range of buyers' selection within your site.

In general, if your hit ratios are relatively high over time, buyers are likely to be able to retrieve the most-requested product and article data from the

cache, which is faster than retrieving it from the database. However, a high hit ratio alone does not indicate site efficiency.

For example, consider the scenario where a hit ratio is high, but only a few products have been viewed. In this case, the administrator might consider decreasing the cache size from 100 to a number closer to the actual number of different products being requested.

Also, if you consider the number of products in the shopping site, the statistics can also show the range of product selection among your buyers. In the example above, if the shopping site contained only twenty products, these statistics would show that buyers were selecting a broad range of the available products to view. However, if the site contained 200 products, the statistics would show that buyers were selecting only a few of the available products to view.

In general, you may safely decrease your cache size when, over time, the Current Cache Size value remains significantly lower than the Cache Max Size value.

You may want to increase your cache size value if, over time, the number of removals continues to increase. This would indicate that buyers are continuing to select a greater number of different products or articles than is available in the cache.

Note: When increasing the cache size, do not increase it to the point that you will approach or exceed the limit of memory available.

Complete the following fields:

Maximum Cache Size

The maximum number of products and their details that can be kept in memory at any one time. These values can be changed in the cache-size fields.

Current Cache Size

The number of different products or articles that have been added to the cache as a result of buyers browsing to them in your site.

Total # of Requests

The number of requests made to the cache. This is the number of times buyers have browsed to products in your shopping site (or to articles, for article cache statistics).

of Cache Hits

The number of times the product or article requested was found in the cache.

# of Cache Misses

The number of times the product or article requested was not found in the cache. In these cases, data about the product or article was retrieved from the database.

# of Cache Removals

The number of times a product or article in the cache has been removed from the cache. This occurs when the number of different products or articles requested exceeds the cache size.

Cache Hit Ratio

The ratio of cache hits to all cache requests.

System Diagnostic Tools

The System Integration Map and Site Connection Details pages provide diagnostic tools in case you require troubleshooting assistance from TouchNet.

4.2   Changing User Roles

After users have been created and assigned roles, you can make changes to the roles that have been assigned. However, when you make changes to roles, you should keep the following two points in mind:

- Always notify users when you change their roles.

- If you change your own roles, you must log out and log back in to see the changes.

Note: Each user can have multiple roles. For example, a merchant manager can also be an administrator or an accountant. Each merchant manager can manage multiple merchants. And a store manager can manage multiple stores.

Changing Administrative and Merchant User Roles

Follow these steps to edit user roles for chief administrators, administrators, accountants, and merchant managers.

1   From the Control Menu, navigate to Marketplace Home > System Administration > User Settings > Users. The Marketplace User Settings screen appears.

2 Click the Edit User link to the right of the person you want to edit roles for. The following screen appears:

3 To remove a role, click the Remove check box for that role. To add a role, click the Add checkbox for that role.

Note: Only chief administrators can edit other chief administrators or administrators. Administrators can edit accountant and merchant manager roles.

4 Click the Save Changes button.

Changing Store and uPay Site Manager User Roles

Use the following steps to edit user roles for store managers and uPay site managers.

Note: Only merchant managers can edit these roles.

1 From the Control Menu, navigate to Marketplace Home > [merchant] > Users. The Marketplace Merchant User Settings screen appears.

Merchant Users by Role

Click the user's name to send an e-mail. Click Edit User to change the user's access to stores or uPay sites.

Add User | View All Marketplace Users

Merchant Managers

Full Name	Username	Action
Gary Johnson	gjohnson	Edit User

Store Managers

Full Name	Username	Action
Campus Books		
Gary Johnson	gjohnson	Edit User
Campus Events		
Gary Johnson	gjohnson	Edit User
Campus Wear		
Gary Johnson	gjohnson	Edit User

UPay Site Managers

No UPay Sites.		
Full Name	**Username**	**Action**

2 Click the Edit User link to the right of the person you want to edit roles for. The following screen appears:

3   To remove a role, click the Remove check box for that role. To add a role, click the Add checkbox for that role.

4   Click the Save Changes button.

Changing Store User Roles

Follow these steps to edit user roles for store clerks, store contacts, fulfillers with replace/cancel rights, and fulfillers.

Note: Only store managers can edit these roles.

1   From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > Store Users. The [Store] Users/ Roles screen appears.

2   Click the Edit User link to the right of the person you want to edit roles for. The following screen appears:

Campus Wear Users by Role

Click the user's name to send an e-mail. Click Edit User to change the user's roles.

[Add User] [View All Marketplace Users]

Store Managers

Full Name	Username	Action
Gary Johnson	gjohnson	Edit User

Fulfillers With Cancel/Refund Rights

Full Name	Username	Action
Gary Johnson	gjohnson	Edit User

Fulfillers

Full Name	Username	Action
Gary Johnson	gjohnson	Edit User

Store Clerks

Full Name	Username	Action
Gary Johnson	gjohnson	Edit User

Store Contact

Full Name	Username	Action
Gary Johnson	gjohnson	Edit User

3   Click the checkboxes to add or remove roles for this user.

4   Click the Add Roles button to save your choices.

4.3   User Groups and User Authentication

A "user group" is a category of shoppers. Marketplace includes two user groups by default. Most Marketplace sites will use only these groups:

- **Everybody**. All shoppers are part of the "Everybody" group. It does not require a special login from the shopper.

- **Registered Users**. Any shopper who sets up a Marketplace profile automatically becomes part of the "Registered Users" group.

A Marketplace administrator can add additional user groups for private stores. The login credentials of these users must be authenticated against an on-campus system. For example, if students on your campus have a student ID and PIN maintained by your SIS, the Marketplace administrator can create a Marketplace user group called "Students." The administrator would also need to define an authentication method for the "Students" group. Store managers can subsequently decide that only a certain user group can have access to this store.

For instructions on how to add a new user group and establish user authentication, go to "User Groups and Private Stores" on page 169.

For instructions on how to to create a link from another campus application into uStores using group logins, go to "How to Link to Marketplace with Group Logins" on page 177.

4.4 Adding a Privacy Policy and Online Help

TouchNet strongly recommends that you develop policies regarding the privacy of shoppers' data and the use of unsolicited bulk e-mail. Policies such as these should be available for buyers from the privacy policy link in your shopping site.

Note: If your Marketplace system is hosted in the TouchNet Secure DataCenter, contact TouchNet for help with changes to the privacy policy and site info.

Adding Your Privacy Policy

With your Marketplace installation, you were provided an HTM file in which to record your site's privacy policy. This page opens from the Site Privacy Policy link on the Marketplace shopping site's home page.

To edit text for your privacy policy, you may change the *privacypolicy.htm* file. Using a text or html editor, open the file from this location:

touchnet\marketplace50\webapp\ustores\web\privacy_policy.htm

After you have added and formatted your text, save and close the file.

Important! Save a copy of the *privacypolicy.htm* file in another location, outside your Marketplace implementation. This will ensure that your changes are not overwritten when you receive future upgrades of TouchNet Marketplace.

Adding Online Help for Buyers

Your Marketplace installation includes the *site_info.htm* file, which opens from the Site Info icon on the Marketplace shopping site's home page.

The default text in the file is titled "Site Tips and Information." The text explains that cookies must be enabled and that web accelerator products must be disabled for a buyer to use the shopping site.

To customize site tips for shoppers, you can change the text and formatting of the *site_info.htm* file. Using a text or html editor, open the file from this location:

touchnet\marketplace50\webapp\ustores\web\site_info.htm

Add and format your text, then save and close the file. If you link to other HTM files from the site_info.htm file, store these files in the \ustores\web directory also.

Note: If you use a commercial authoring tool to create buyer online help files, ensure that the name of the help file to be called from the icon is *site_info.htm*. Then, replace the original *site_info.htm* file with your own help files.

Always back up your customized help files. Save a copy of the *site_info.htm* and any additional help files in another location, outside your Marketplace implementation. This will ensure that your changes are not overwritten when you receive future upgrades of Marketplace.

4.5   Using CAPTCHA Login Challenges

By default, the Marketplace uStores shopping application and the Marketplace Operations Center will use a CAPTCHA image challenge at login after the user has consecutively failed a pre-determined number of login attempts.

In the uStores shopping application, users may encounter the CAPTCHA challenge when logging into "My Account." uPay does not use a CAPTCHA challenge.

Note: CAPTCHA stands for "completely automated public Turing test to tell computers and humans apart." A CAPTCHA challenge provides increased security against automated brute-force login attempts.

The CAPTCHA challenge presents the user with an image of uppercase letters. To log in, the user must enter the letters displayed on screen, using a matching case. This helps to prevent unauthorized logins obtained through computer-generated combinations of user names and passwords.

You can control two CAPTCHA settings in the *critical.prp* files for the uStores shopping application and the Operations Center. You can turn the CAPTCHA challenge on or off, and you can change the number of failed login attempts before the CAPTCHA challenge appears.

1   In a text editor, open the *critical.prp* file.

For the uStores online shopping site, this file is at this location:

Path for Microsoft Windows users:

\touchnet\marketplace50\webapp\ustores\WEB-INF\config\critical.prp

Path for Sun Solaris users:

/usr/local/touchnet/marketplace50/webapp/ustores/WEB-INF/config/critical.prp

For the Operations Center, this file is at this location:

Path for Microsoft Windows users:

\touchnet\marketplace50\webapp\admin\WEB-INF\config\critical.prp

Path for Sun Solaris users:

/usr/local/touchnet/marketplace50/webapp/admin/WEB-INF/config/critical.prp

2   Change values as needed:

- EnableCaptchaChallenge = yes

    Change the value to no to turn off the CAPTCHA challenge, or yes to turn it on.

- FailedLoginsBeforeCaptcha = 5

    Change to the number of failed login attempts you will allow before showing the CAPTCHA challenge.

3   Save and close the file.

4.6   Changing Session Timeout Values

Each of the Marketplace web applications has its own *web.xml* file in which a session timeout value is stored. The default session timeout for the Operations Center is 60 minutes, and the default session timeout for both uStores and uPay is 15 minutes. If required, you can change the session timeout values for these web applications.

Note: Windows users can find the *web.xml* files in the following locations: the Operations Center *web.xml* file can be found in *\touchnet\marketplace50\webapp\admin\WEB-INF*, the uStores *web.xml* file can be found in *\touchnet\marketplace50\webapp\ustores\WEB-INF*, and the uPay *web.xml* file can be found in *\touchnet\marketplace50\webapp\upay\WEB-INF*. Solaris users can find the *web.xml* files in the following locations: the Operations Center *web.xml* file can be found in */user/local/touchnet/marketplace50/webapp/admin/WEB-INF*, the uStores *web.xml* file can be found in */user/local/touchnet/marketplace50/webapp/ustores/WEB-INF*, and the uPay *web.xml* file can be found in */user/local/touchnet/marketplace50/webapp/upay/WEB-INF*.

To change the session timeout value for a Marketplace web application, use the following instructions:

1 Open the *web.xml* file for the web application that you would like to change.

2 Locate these lines in the file:

```
<session-config>
    <session-timeout>[timeout value in minutes]</session-
timeout>
</session-config>
```

3 Change the session timeout value to the number of minutes that you prefer.

4 Save and close the file.

5.0   Adding and Setting Up Stores

This section explains how to add and set up stores. If uStores system-level settings such as categories, delivery methods, and tax account codes have not yet been established, contact your administrator. These settings should be in place before you add a new store.

5.1   Adding a New Store

Before setting up a new store, the merchant manager needs to know:

- What you want to name the store

- Who the store manager will be

- The return policy that will be displayed for all customers

- Whether general ledger accounting will be used (and if so, the default accounting code, as well as whether store-specific account codes will be used)

- Whether anyone should be notified by e-mail when donations are made (and if so the applicable e-mail addresses)

Important! If your store will be using store-specific general ledger accounting codes, you must set up these codes before beginning the process of adding a new store. Go to Section 5.4, "Adding Accounting Codes" on page 111 and complete these instructions before you attempt to add a new store.

There's no need to have already added the Marketplace user who will be the store manager. The merchant manager can add them while you're adding the store.

Follow these steps to add a new store. Remember, only merchant managers can add stores.

1   From the Control Menu, navigate to Marketplace Home > [merchant] > Store > Add Store. The Add a New Store screen appears.

2   Enter the store name. This will be displayed in the Operations Center and in reports. The store manager can change the name later if necessary.

3   If this store will perform general ledger updates, click the checkbox.

4   If you use general ledger (GL) capabilities, choose a default accounting code.

5   Specify the store manager by choosing from the drop-down list if he or she is an existing user in the Marketplace system. If not, create the user by assigning him or her a username and password to use as store manager. Choose the username carefully, as these cannot be changed later. The password must contain six to twenty alphanumeric

characters. In addition, it must contain at least one number and one alphabetic character.

6 Click the Create New Store button. The store is created and the General Settings screen appears.

7 Complete the fields.

Field tips and explanations:

- **Store Id**—This field displays the ID assigned to the store. You will need this ID number if you wish to determine the store's URL

before the store goes online. You will also need the Store ID value if your store uses single-store-only mode and the "Store is Viewable In Mall" option is set to "No." (In this case, you can only navigate to the store by using a store URL, which includes the Store ID value.) For more information about linking to a store, see "Linking to a Store" on page 128.

- **Store Name**—The Store Name appears in the Operations Center and in financial reports. You can change this name here. Just be sure to let your administrators know so they can find your store in their reports.

- **Store Display Name**—The Store Display Name is the name you want shoppers to see in the site and in e-mail correspondence regarding orders.

- **Return Policy**—A link to the Return Policy page appears on all product pages. This policy should cover all of your store's products. Note any individual differences in the product description.

- **Special Announcement**—The Special Announcement appears on your store's home page. Use it to let customers know about promotions, sales, store changes, etc.

- **Email Fulfillment Announcement**—The Email Fulfillment Announcement appears on e-mail messages generated to customers upon the completion of the fulfillment process. Use this announcement field to enter a paragraph that tells customers their payment method has been processed and their orders are being shipped.

- **Email Order Announcement**—The Email Order Announcement appears on e-mail messages generated to customers after orders have been placed. Use this announcement field to enter a paragraph that tells customers their orders have been received.

- **Email Cancel Order Announcement**—The Email Cancel Order Announcement appears on e-mail messages generated when orders are cancelled during the fulfillment process (because an item is no longer available, because the customer's credit card number is incorrect, because the customer's credit card has expired, etc.). Use this announcement field to enter a paragraph that tells customers their orders have been cancelled.

- **Store Home Page Layout**—Choose a Store Home Page Layout from the dropdown list. List entries describe what will be shown on your home page for each layout.

  Note: If you change to the Splash layout after using the Default layout, you must move products from your Store Home Page category into other categories, or they will not appear in your store.

- **Total Digital File Space Used by Store (in bytes)**—Displays the total file space used by this store's digital products.

- **Total Size Available for Digital Files (in bytes)**—Displays the total file space designated for this store's digital products. This value is set in the system administration setting. For more about this value, see "Digital File Settings" on page 60. If your store needs more total file space for digital products, contact the Marketplace administrator.

Single Store Only:	○ Yes ◉ No
Single Store Only Options: *only used when running as a single store*	
Alternate "Add to Cart" Text:	
Alternate "Shopping Cart" Text:	
Alternate "Continue Shopping" Text:	
Alternate "Checkout" Text:	
Alternate "Order" Text:	
Alternate "Buyer" Text:	
Show Cart Quantity:	○ Yes ◉ No
Show Promotional Code:	○ Yes ◉ No
Show Shipping Rates:	○ Yes ◉ No
Show Return Policy:	○ Yes ◉ No
Show Registration:	○ Yes ◉ No
Show Store Title Image In Header:	○ Yes ◉ No
Show Store Name In Header:	○ Yes ◉ No

Single-store-only fields on the [Store] General Settings page

- **Single Store Only**—To activate single-store-only mode, select the "Yes" radio button. Single-store-only mode allows you to establish stores that are not connected to other stores in the Marketplace shopping application. For instructions on how to link to a store in single-store-only mode, see "Linking to a Store" on page 128.

  - **Alternate "Add to Cart" Text**—On the product pages in the Marketplace shopping application, the words "Add to Cart" appear on buttons. If this language does not fit the needs of your store, you can enter alternative text in this field.

  - **Alternate "Shopping Cart" Text**—At various places in the Marketplace shopping application, the words "shopping cart" appear. If this language does not fit the needs of your store, you can enter alternative text in this field. (Your entry in this field

will also replace instances of "My Cart" in the top navigation bar, including the cart icon image.)

- **Alternate "Continue Shopping" Text**—As part of the Shopping Cart and Checkout pages, a, "Continue Shopping" button appears. If this language does not fit the needs of your store, you can enter alternative language in this field.

- **Alternate "Checkout" Text**—After the customer has placed items in their shopping cart, they can view the Shopping Cart. This page includes a "Checkout" button that can be used to initiate the checkout process. If this language does not fit the needs of your store, you can enter alternative language in this field.

- **Alternate "Order" Text**—At various places in the Marketplace shopping application, the word "order" appears. If this language does not fit the needs of your store, you can enter alternative language in this field.

- **Show Cart Quantity**—In the Marketplace shopping application's Shopping Cart, as well as the checkout pages, a column for "Quantity" appears. This column indicates the quantity of each item that you are ordering. If this information is irrelevant for your store, you can have this column removed.

- **Show Promotional Code**—In the Marketplace shopping application's checkout process, a field for entering a promotional code appears. If this field is irrelevant for your store, you can select the No radio button to remove the promotional code field.

- **Show Shipping Rates**—In the bottom navigation bar of the Marketplace shopping application, a link for "Shipping Rates" appears. If this link is irrelevant for your store, you can have this link removed.

- **Show Return Policy**—In the bottom navigation bar of the Marketplace shopping application, a link for"Return Policy" appears. If this link is irrelevant for your store, you can have this link removed.

- **Show Registration**—In the top navigation bar of the Marketplace shopping application, links appear for "Register" and "Login." In addition, as part of the checkout process, registered users are given an opportunity to sign in (and non-registered users are given an opportunity to become registered). If these fields are irrelevant for your store, you can have these fields removed.

- **Show Store Title Image in Header**—In the header area of the Marketplace shopping application, a mall logo appears. For

single-store-only mode, you may want to display a store title instead. If you choose the "Yes" radio button, be sure to use the [Store] Images page to upload a store title image, as described in "Images" on page 92.

- **Show Store Name in Header**—In single-store-only mode, you can add the store name (text) to the header. This text will appear right justified above the top navigation bar links.

- **Store is Viewable in Mall**—Select the "Yes" radio button. Only applies if you use the Single Store Only option. The "Store is Viewable in Mall" option determines if a link to the store appears on the home page of the Marketplace shopping application.

  Note: If the Single Store Only option is set to "Yes" AND the "Store is Viewable in Mall" option is set to "Yes", the store will not use the single-store-only customizations when reached via the Marketplace mall. In this situation, the single-store-only customizations will only be used in conjunction with a direct link that includes the SINGLESTORE = "true" parameter (as described in "Linking to a Store" on page 128).

Advancement fields on the [Store] General Settings page

- **Store is Advancement**— If the store will integrate with Banner Advancement, select the "Yes" radio button. (This field does not display unless your installation of Marketplace has already been configured for using Advancement.) When Advancement integration is established, the following fields become available. You must contact your Advancement administrator about the allowable values for the following fields.

- **Operator ID**

- **Address Type**

- **Email Type**

- **Phone Type**

- **Gift Code**

- **Perform General Ledger Updates**—This field only appears for merchant managers. By selecting this option, general ledger reporting is activated for the store. For more about general ledger reporting, see "General Ledger Information" on page 281.

- **Default Accounting Code**—This field only appear for merchant managers. If you select the "Perform General Ledger Updates" checkbox, you must make a selection from the Default Accounting Code drop-down list. This field lists all the accounting codes that are available for this store to use.

- **E-mail addresses to notify when donations are made**—You can enter a list of e-mail addresses in this field. When donations are made in this store, notification e-mail messages are sent to all the e-mail addresses entered in this field.

8 Click the Save Changes button.

9 Send the following information by e-mail to the store manager:

- The name of the store.

- The URLs of the Marketplace Operations Center and the shopping site.

- The store manager's username and password. (New users should change the password you provide when they login.)

After you have completed these steps, your online store has been set up; however, there are many additional store settings that need to be considered. These settings are described in "Store Settings" on page 83 and include uploading store graphics, selecting default payment methods, setting shipping rates, creating store product categories, and determining the allowable shopping groups. Unlike adding a new store, which can only be done by a merchant manager, these additional store settings can be done by a store manager.

5.2   Store Settings

Each store's settings can be changed easily whenever necessary by the merchant manager or store manager. Unlike changes to site features, changes to store settings don't affect other stores or the design of the site's home page.

Although you can go on to some other parts of setup without selecting your store's settings, you will have a better idea of your store's total design if you make initial choices and then edit the settings as necessary while you build the store.

Important! Once a store is established, you must add at least one shipment class, as described in "Shipping Rates" on page 95. Without at least one shipment class, products cannot be added to the store.

Before Bringing Your Store Online

Set up your store before bringing it online. When you bring the store online, its name will appear as a link on the site's home page. If your school's site is live, shoppers will see your store's products as soon as you bring the store online.

If you want to bring the store online before it's fully finished, you may want to use a "coming soon" or "under construction" splash graphic or special announcement. (More details about splash graphics and special announcements follow in this section.)

Note: You can also use Single Store mode temporarily when you bring a store online. When stores are in Single Store mode, they can only be accessed by customers that have the URL for the store (or that use a link that leads directly to the store).When in Single Store mode, the store cannot be accessed from the Marketplace home page. When the store is ready to go live, simply remove the store from Single Store mode.

You don't need to take your store offline to make changes to the store, but remember that shoppers in a live site will see the changes as you make them.

Follow the steps in this section to set up your store. Only the merchant manager can set store features while adding a store. Both merchant managers and store managers can edit store settings.

Important! By default, new stores are initially offline. After a store's settings have been completed, you are ready to bring your store online by visiting the General Settings page for the store and choosing the Bring Store

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Online button. This procedure is described in see Section 5.11, "Moving a Store Online or Offline" on page 127. Unless you follow this procedure, your store will remain offline and unavailable to shoppers.

General
Settings

Follow these steps to complete your store's general settings:

1   From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > General. The [Store] General Settings screen appears.

2   Complete the fields.

Field tips and explanations:

- **Store Id**—This field displays the ID assigned to the store. You will need this ID number if you wish to determine the store's URL before the store goes online. You will also need the Store ID value if your store uses single-store-only mode and the "Store is Viewable In Mall" option is set to "No." (In this case, you can only navigate to the store by using a store URL, which includes the Store ID value.) For more information about linking to a store, see "Linking to a Store" on page 128.

- **Store Name**—The Store Name appears in the Operations Center and in financial reports. You can change this name here. Just be sure to let your administrators know so they can find your store in their reports.

- **Store Display Name**—The Store Display Name is the name you want shoppers to see in the site and in e-mail correspondence regarding orders.

- **Return Policy**—A link to the Return Policy page appears on all product pages. This policy should cover all of your store's products. Note any individual differences in the product description.

- **Special Announcement**—The Special Announcement appears on your store's home page. Use it to let customers know about promotions, sales, store changes, etc.

  Note: You can use HTML in the Return Policy field and the Special Announcement field. For more information about the allowable HTML tags, see "Using HTML in the Store General Settings" on page 110.

- **Email Fulfillment Announcement**—The Email Fulfillment Announcement appears on e-mail messages generated to customers upon the completion of the fulfillment process. Use this announcement field to enter a paragraph that tells customers their payment method has been processed and their orders are being shipped.

- **Email Order Announcement**—The Email Order Announcement appears on e-mail messages generated to customers after orders have been placed. Use this announcement field to enter a paragraph that tells customers their orders have been received.

- **Email Cancel Order Announcement**—The Email Cancel Order Announcement appears on e-mail messages generated when orders are cancelled during the fulfillment process (for example, because an item is no longer available, because the customer's credit card number is incorrect, because the customer's credit card

has expired, etc.). Use this announcement field to enter a paragraph that tells customers their orders have been cancelled.

- **Store Home Page Layout**—Choose a Store Home Page Layout from the dropdown list. List entries describe what will be shown on your home page for each layout.

  Note: If you change to the Splash layout after using the Default layout, you must move products from your Store Home Page category into other categories, or they will not appear in your store.

- **Total Digital File Space Used by Store (in bytes)**—Displays the total file space used by this store's digital products.

- **Total Size Available for Digital Files (in bytes)**—Displays the total file space designated for this store's digital products. This value is set in the system administration setting. For more about this value, see "Digital File Settings" on page 60. If your store needs more total file space for digital products, contact the Marketplace administrator.

- **Allow Partial Refunds**—The refund process for each store can be set to either run in the standard mode (in which only complete refunds are allowed) or in the partial refunds mode (in which the fulfiller can enter a refund amount up to the total transaction amount). To use the standard refund mode, select No for the Allow Partial Refunds prompt. To use the partial refunds mode, select Yes. (For more about partial refunds, see "Processing Refunds" on page 189.)

- **Allow The Refunding of Shipping**—To allow for the refunding of shipping, select Yes. If you select No, fulfillers will not be able to refund shipping.

- **Allow Recurring Payments On Products**—When this option is set to Yes, recurring payment plan functionality can be added to donation products on a product-by-product basis. If this option is set to No, recurring payment plan functionality is not available for any products in the store.

  Note: Recurring payments are only allowed with donation products. This field has no affect for generic products and digital products.

Single Store Only:	○ Yes ● No
Single Store Only Options: *only used when running as a single store*	
Alternate "Add to Cart" Text:	
Alternate "Shopping Cart" Text:	
Alternate "Continue Shopping" Text:	
Alternate "Checkout" Text:	
Alternate "Order" Text:	
Alternate "Buyer" Text:	
Show Cart Quantity:	○ Yes ● No
Show Promotional Code:	○ Yes ● No
Show Shipping Rates:	○ Yes ● No
Show Return Policy:	○ Yes ● No
Show Registration:	○ Yes ● No
Show Store Title Image In Header:	○ Yes ● No
Show Store Name In Header:	○ Yes ● No

Single-store-only fields on the [Store] General Settings page

- **Single Store Only**—To activate single-store-only mode, select the "Yes" radio button. Single-store-only mode allows you to establish stores that are not connected to other stores in the Marketplace shopping application. For instructions on how to link to a store in single-store-only mode, see "Linking to a Store" on page 128.

  - **Alternate "Add to Cart" Text**—On the product pages in the Marketplace shopping application, the words "Add to Cart" appear on buttons. If this language does not fit the needs of your store, you can enter alternative text in this field.

  - **Alternate "Shopping Cart" Text**—At various places in the Marketplace shopping application, the words "shopping cart" appear. If this language does not fit the needs of your store, you can enter alternative text in this field. (Your entry in this field will also replace instances of "My Cart" in the top navigation bar, including the cart icon image.)

  - **Alternate "Continue Shopping" Text**—As part of the Shopping Cart and Checkout pages, a "Continue Shopping" button appears. If this language does not fit the needs of your store, you can enter alternative language in this field.

  - **Alternate "Checkout" Text**—After the customer has placed items in their shopping cart, they can view the Shopping Cart. This page includes a "Checkout" button that can be used to initiate the checkout process. If this language does not fit the

needs of your store, you can enter alternative language in this field.

- **Alternate "Order" Text**—At various places in the Marketplace shopping application, the word "order" appears. If this language does not fit the needs of your store, you can enter alternative language in this field.

- **Alternate "Buyer" Text**—At various places in the Marketplace shopping application, the word "buyer" appears. If this language does not fit the needs of your store, you can enter alternative language in this field.

- **Show Cart Quantity**—In the Marketplace shopping application's Shopping Cart, as well as the checkout pages, a column for "Quantity" appears. This column indicates the quantity of each item that you are ordering. If this information is irrelevant for your store, you can have this column removed.

- **Show Promotional Code**—In the Marketplace shopping application's checkout process, a field for entering a promotional code appears. If this field is irrelevant for your store, you can have this column removed.

- **Show Shipping Rates**—In the bottom navigation bar of the Marketplace shopping application, a link for "Shipping Rates" appears. If this link is irrelevant for your store, you can have this link removed.

- **Show Return Policy**—In the bottom navigation bar of the Marketplace shopping application, a link for"Return Policy" appears. If this link is irrelevant for your store, you can have this link removed.

- **Show Registration**—In the top navigation bar of the Marketplace shopping application, links appear for "Register" and "Login." In addition, as part of the checkout process, registered users are given an opportunity to sign in (and non-registered users are given an opportunity to become registered). If these fields are irrelevant for your store, you can have these fields removed.

- **Show Store Title Image in Header**—In the header area of the Marketplace shopping application, a mall logo appears. For single-store-only mode, you may want to display a store title instead. If you choose the "Yes" radio button, be sure to use the [Store] Images page to upload a store title image, as described in "Images" on page 92.

- **Show Store Name in Header**—In single-store-only mode, you can add the store name (text) to the header. This text will appear right justified above the top navigation bar links.

Advancement fields on the [Store] General Settings page

- **Header**—The text or HTML entered in this field will appear in the header area of the Marketplace shopping application. The additional text or HTML only appears when the store is displayed in single-store mode.

- **Left Navigation**—The text or HTML entered in this field will appear in the left navigation area of the Marketplace shopping application, below the store logo (if a store logo is being used). The additional text or HTML only appears when the store is displayed in single-store mode.

- **Footer**—The text or HTML entered in this field will appear in the footer area of the Marketplace shopping application. The additional text or HTML only appears when the store is displayed in single-store mode.

  Note: For more information about using HTML in the Header, Left Navigation, and Footer fields, see "Using HTML in the Store General Settings" on page 110.

- **Store is Viewable in Mall**—Select the "Yes" radio button. Only applies if you use the Single Store Only option. The "Store is Viewable in Mall" option determines if a link to the store appears on the home page of the Marketplace shopping application.

Note: If the Single Store Only option is set to "Yes" AND the "Store is Viewable in Mall" option is set to "Yes", the store will not use the single-store-only customizations when reached via the Marketplace mall. In this situation, the single-store-only customizations will only be used in conjunction with a direct link that includes the SINGLESTORE = "true" parameter (as described in "Linking to a Store" on page 128).

- **Store is Advancement**— If the store will integrate with Banner Advancement, select the "Yes" radio button. (This field does not display unless your installation of Marketplace has already been configured for using Advancement.) When Advancement integration is established, the following fields become available. You must contact your Advancement administrator about the allowable values for the following fields.

  - **Operator I**D
  - **Address Type**
  - **Email Type**
  - **Phone Type**
  - **Gift Code**

- **Perform General Ledger Updates**—This field only appears for merchant managers. By selecting this option, general ledger reporting is activated for the store. For more about general ledger reporting, see "General Ledger Information" on page 281.

- **Default Accounting Code**—This field only appear for merchant managers. If you select the "Perform General Ledger Updates" checkbox, you must make a selection from the Default Accounting Code drop-down list. This field lists all the accounting codes that are available for this store to use.

- **E-mail addresses to notify when donations are made**—You can enter a list of e-mail addresses in this field. When donations are made in this store, notification e-mail messages are sent to all the e-mail addresses entered in this field.

3   Click the Save Changes button.

Store Users

Follow these steps to view a list of store users and their roles.

1   From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > Store Users. The [Store] Users by Role screen appears.

Campus Wear Users by Role

Click the user's name to send an e-mail. Click Edit User to change the user's roles.

[Add User] [View All Marketplace Users]

Store Managers

Full Name	Username	Action
Gary Johnson	gjohnson	Edit User

Fulfillers With Cancel/Refund Rights

Full Name	Username	Action
Gary Johnson	gjohnson	Edit User

Fulfillers

Full Name	Username	Action
Gary Johnson	gjohnson	Edit User

Store Clerks

Full Name	Username	Action
Gary Johnson	gjohnson	Edit User

Store Contact

Full Name	Username	Action
Gary Johnson	gjohnson	Edit User

2   The Users by Role screen lists all the users (and their usernames) who
    have been assigned roles for this store, including store managers, store
    clerks, fulfillers, fulfillers with cancel/refund rights, and store contacts.
    This screen allows for the following actions:

- **Add a new user**—You can add new store clerks, fulfillers, fulfillers
  with cancel/refund rights, and store contacts by choosing the "Add
  New User" link (and provided you are a merchant manager or store
  manager). For detailed instructions, see Section 5.7, "Adding Store
  Users" on page 122.

- **Send e-mail to the user**—You can send an e-mail message to a
  store user by clicking the user's name. This action will open a new
  e-mail message in your e-mail software application with the user's
  e-mail address inserted in the To field.

- **Edit user**—You can edit a user's role by choosing the "Edit User"
  link. For detailed instructions, see Section 5.9, "Editing Store User
  Roles" on page 125.

Images

Follow these steps to set up the images for your store.

1 From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > Images. The [Store] Image Settings screen appears.

Note: The following example shows the Image Settings screen as it appears for a Splash home page layout. If you chose the Default home page layout in General Settings you will only see the Current Logo Image section.

2 Upload your store logo image.

The store logo image appears on the left side of product pages in your store. If you are using single-store-only mode, this image may not display if you selected to use a store title in the header (on the [Store] General Settings page).

Note: By default, this image should be no wider than 150 pixels; however, if the uStores stylesheet (*marketplace.css)* has been modified to increase the width of this area, a wider logo image may be acceptable. For more information about Marketplace stylesheets, see the *Marketplace 5.0 CSS Guide*.

3 Upload your store title image (if applicable).

This option only appears if you both 1) selected single-store-only mode when choosing the store settings and 2) selected to use a store title in the header (on the [Store] General Settings page). In this case, the store title image will be used if the customer arrives at the store by using a direct link that includes the "SINGLESTORE=true" parameter (see "Linking to a Store" on page 128). This image will appear in the header area of the store's web pages. However, if a customer arrives at the store by way of the Marketplace mall (if the store is viewable in the mall), the mall logo will appear in the header, not the store title image.

4 Upload your splash image (if applicable).

The splash image appears on your store's home page only when the Splash home page layout is selected on the [Store] General Settings page. If the Splash layout option is not selected, the splash image option will not be displayed.

> **Note:** By default, this image should be no wider than 530 pixels; however, if the uStores stylesheet (*marketplace.css)* has been modified to increase the width of this area, a wider splash image may be acceptable. Likewise, if the stylesheet has been modified to reduce the width of this area, a narrower splash image may be required to prevent potential layout problems. For more information about Marketplace stylesheets, see the *Marketplace 5.0 CSS Guide.*

5 Optional: link the splash image to a store category, product, or URL. A shopper who clicks on the splash image will be routed to the destination. Without link information, the splash image is static (not a broken link).

If you use a URL, enter the full URL, beginning with http://. Use the description box to describe the web page you'll link to. When the shopper passes the cursor over the splash image, the description will appear.

Image descriptions help visually impaired users, who can hear the text through screen reader tools. The descriptions may be required by your school for compliance with federal regulations.

6 Click the Save Store Image Info button.

Image Specifications

- You can only use GIF, JPG, or PNG format images.
- Logo images are best displayed at a pixel size of 150 (width) x 300 (height).

- Store title images are best displayed at a pixel size of 270 (width) by 75 (height).

- Splash images are best displayed at a pixel size of 530 (width) x 280 (height).

- All images must have file sizes of 250K or less.

Payment Methods

The payment method settings determine how the existing payment methods will be used by your store.

Note: The payment methods available on a store's Payment Methods page are determined by the Payment Gateway Host System Account that was selected when the Marketplace merchant (to which the store belongs) was established. Marketplace users cannot add payment methods to stores or merchants. Payment methods can only be created in Payment Gateway.

Follow these steps to select the payment method settings for your store.

1   From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > Payment Methods. The Payment Methods screen appears.

Campus Wear Payment Methods

Payment methods are configured in Payment Gateway for the host system account. Select a default. Authentication methods, if used, are set up by the Marketplace administrator.

Host System Account:	Campus Stuff

Payment Method	Default For New Products?	Sort Key
AmEx	☑	1
Discover	☑	2
MasterCard	☑	3
Visa	☑	4
webCheck	☑	5
Departmental Charge	☐	

Save

2   Select which payment methods should be pre-selected (checked) for new products. All the payment methods displayed on this screen are still available for new products. Your choices here only determine which payment methods will be automatically checked when you add a product.

3   Leave the Authentication Method set to No Authentication unless either of the following situations applies: 1) your school has developed

authentication transactions to use with Marketplace ("How to Add an Authentication Method" on page 173) or 2) you would like the payment method to be available only to registered users (in which case you would select "Registered Users" as the Authentication Method).

4 Enter the order you want the methods to appear in the Sort Key column.

5 Click the Save Changes button.

Note: The settings on the Payment Methods page do not restrict the available payment methods. If you need to limit the available payment methods for all products in a store, you can do so by using the Group Payment Methods page, as described in "Group Payment Methods" on page 104.

Shipping Rates

When shoppers buy a product, they choose how they want it shipped—for instance, first-class or overnight, or which commercial carrier. Their list of choices and the rates they're charged come from the shipping class.

Shipping classes let you group physically similar products and charge the right shipping rates for different types of items, for all the ways those items might be shipped. Before you can add products to your store, you must define at least one shipping class. Later, when you enter products, you will associate a shipping class with each product.

When you set up shipping rates for a store, you will be asked to enter a default delivery location. This delivery location is used for calculating tax on products that do not require delivery, such as seminar registrations. This delivery location will also be used for delivery options such as "will-call," in which the customer picks up the product and no delivery takes place.

For each shipping rate, you must choose the correct tax level to charge on shipping. Tax law and tax rates vary by state and local district. Ask your Marketplace administrator for guidelines on your site's tax rates.

Follow these steps to set up shipping rates for your store.

1 From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > Shipping Rates. The Shipping Rates screen appears.

2 Use the links at the top of the screen to add, rename, or delete a shipping class.

Note: Remember, choose names that describe your shipping rate scheme. Shoppers can see the shipping class names and rate information by clicking the store's Shipping Rates link.

3 Use the Shipping Rate Tables to enable delivery methods, enter charge amounts, require shipping addresses, choose tax classes, and enter accounting code overrides.

You can charge both base charges and a per additional item charge on each of your shipments.

For instance, if a shopper buys two t-shirts from your store and requests them shipped by the same delivery method—let's say, commercial two-day shipping—then the shopper will pay the base rate for shipping the first shirt and the per-item rate for the second shirt.

Note: Tax rates are set up by an administrator. The assignment of "no tax," "default tax rate," or "higher tax rate" to products depends on your local taxation requirements. (For more information, see "Tax Account Codes" on page 56.)

4 Enter a city, state, and zip code in the Default Delivery Location section. This location is used to calculate taxes when the product will not be physically shipped. In these instances, the default delivery location represents where the customer will pick up the product.

Typically, taxes are based on the customer's shipping address; however, if the product is not shipped to the customer, Marketplace uses the default delivery location to determine the appropriate tax.

5 Click the Save Changes button.

Changing Delivery Methods

In each shipping class, you have enabled whichever delivery methods a shopper might use for shipping products. Delivery methods are added by an administrator for the entire site. If you need additional delivery methods, contact a Marketplace administrator.

Removing a Shipping Class

You cannot delete a shipping class that products currently use. First, edit the products that use the class's shipping rates. Assign each product a new shipping class. Then, remove the unused shipping class. Removing a shipping class does not affect completed orders.

Selecting Allowed Countries for Shipping

You can restrict which countries are available for each delivery method. To select the allowed countries, click the Select Countries link for the corresponding delivery method. The Marketplace Store Shipping Countries Allowed page then appears.

Marketplace Store Shipping Countries Allowed

List of countries this delivery method can deliver to.

Back To Shipping Rates

Save

	Country
☑ Select All	
☑	Afghanistan
☑	Aland Islands
☑	Albania
☑	Algeria
☑	American Samoa

By default, all countries are selected on the Marketplace Store Shipping Countries Allowed page. You can select and de-select countries as necessary by clicking the corresponding checkboxes. Then click the Save button.

Store Categories

Create product categories for your store to make it easier for shoppers to find what they are looking for.

Store categories and subcategories let you group your products any way you want within your store. Later, when you add products, you will place each product in a store category or subcategory. This makes your category names important.

If a category is empty, shoppers won't see its link anywhere in the site. You can add empty categories while you are figuring out the best structure for your store, then move your products into categories later.

Note: If you are using the splash layout for your store home page, you must create at least one store category for your store before you can start adding products.

Follow these steps to set up, edit, sort, and delete categories for your store.

1   From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > Categories. The Category Settings screen appears.

2 To add a new top-level category, click the link. This screen appears.

Enter the category name and choose whether you want the product layout to be:

- **Detailed**—The shopper sees product thumbnail images, short descriptions, names, and prices. This layout works well for categories that don't contain many products, or when you want to quickly advertise more information about the products in a category. The shopper scrolls down the page to see each detailed product listing.

- **Thumbnail**—The shopper sees product thumbnail images and names. This layout works well for many product groupings. Products appear from left to right in rows on the page.

- **Name and Price**—The shopper sees product names and prices. This layout works well when products don't have images, or when the category contains many products. With the Name and Price layout, shoppers won't have to scroll as far through a long product list.

3 Click the OK button.

4 To change the category order, click the Manage Category Listing Order link. This screen appears:

Campus Wear Category List Order

Categories display alphabetically by default. To change the order, enter two-digit numbers (01, 02, 03) to list them in order.

Back To Category Settings

Top Level

Sub-Category Name	Sort Key
Coffee Cups	
Hats	
Sweatshirts	
T-shirts	

Save

In the Sort Key column, use two-digit numbers to show the order you want the categories to appear. Then, click the Save Changes button.

Note: For numbers 1 through 9, use a leading zero (01, 02, 03, and so on). This ensures the listing order will be correct.

5   To edit an existing category, click the Edit link to the right of it. The following screen appears:

Campus Wear Edit Store Category

The category layout you choose applies to all products in the category. Use graphics in JPG, GIF, or PNG formats. Maximum file size is 250K

Back To Category Management

Category Name:	Coffee Cups

Rename

Product Layout:	Thumbnails ▼

Update Layout
View layout samples

Category Logo

(none)

(recommended W x H: 150 x 300 pixels)
Upload Logo Image

Category Thumbnail

(none)

(recommended W x H: 80 x 80 pixels)
Upload Thumbnail Image

6 Make the necessary changes.

Adding New Categories and Subcategories

Add a new category or subcategory when the number of products in a category is too great for shoppers to browse easily, or when too many different types of products are in the same category. Add the new category, then move products into it (as described in Section 6.3, "Managing Products in a Store" on page 153).

Deleting a Category

Over time, you'll find that some categories do not help the shopper as much as others. You may need to delete some categories as you add others. You can't delete a category unless it and all its subcategories are empty. First, move your products; then remove the category.

Renaming a Category

Rename a category or subcategory when its name doesn't reflect the type of products it contains.

Using Category Graphics

Shoppers see store category images when they browse through categories in the store. If a category doesn't use a logo image, the store's logo image will appear instead.

The category logo image appears at the left-hand side of the page. The thumbnail image appears beside the category name in lists of subcategories. It doesn't appear beside top-level category names.

Image Specifications

- You can only use GIF, JPG, or PNG format images.
- Category logos are best displayed at a width by height of 150 x 300 pixels.
- Category thumbnails are best displayed at 80 x 80 pixels.
- All images must have file sizes of 250K or less.

Linking to a Store Category

To link directly to a specific store category, you should navigate to the shopping application (uStores) and then open the category page that you wish to link to. Copy the URL displayed in your browser's address field.

The URL for a store category uses the following format:

http://[server]/[context]/web/store_cat.jsp?STOREID=[store ID#]&CATID=[category ID#]

[server] is the computer where uStores was installed, and [context] is the context path. [store ID#] is the store ID assigned by Marketplace. [category ID#] is the category ID assigned by Marketplace. The category ID value can only be determined by viewing the category page in the shopping application.

Note: If a store is in single-store-only mode and the "Store is Viewable in Mall" option is set to "No" (on the store's General Settings page), you cannot link directly to a store category.

Note: Do not include bracket characters in the URL.

Allowed Groups

A "user group" is a category of shoppers. Marketplace includes two user groups by default. Most Marketplace sites will use only these groups:

- **Everybody**. All shoppers are part of the "Everybody" group. It does not require a special login from the shopper.

- **Registered Users**. Any shopper who sets up a Marketplace profile automatically becomes part of the "Registered Users" group.

A Marketplace administrator can add additional user groups for private stores, and a store manager can subsequently decide that only a certain user group can have access to a store.

To specify the user groups allowed to shop in a store, the store manager follows these steps:

1 From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > Allowed Groups. The Store Group Settings screen appears.

Store Group Settings, showing the two default groups and an additional group created by an administrator

2   Select the groups that can shop in your store.

- If you select Everybody, then all shoppers in Marketplace can shop in the store.

- If you clear the Everybody group and select only Registered Users, then only shoppers who have created profiles can shop in the store.

- Any additional user groups listed are private

Note: Do not clear all the groups, or no one will be able to shop in the store.

3   If shoppers who are not in the selected groups can view products, mark the "Non-members allowed to view products" checkbox. If you have selected the Everybody group for the store, leave this checkbox empty.

4   If you have marked the "Non-members allowed..." checkbox, enter the message that non-members will see when they try to purchase an item.

5   Click the Save Changes button.

Group Payment Methods

The Group Payment Methods page displays the allowed user groups (as determined on the Allowed Groups page), and for each allowed user group, a set of checkboxes is displayed for the available payment methods. You can use the checkboxes to choose which payment methods to make available for each user group.

Important! Even if your store only uses the "everybody" group, be sure to use the Group Payment Methods page to specify the payment methods. If no payment methods are selected, shoppers will not be able to purchase items from the store.

The store manager must specify payment methods for user groups:

1. From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > Groups Payment Methods. The Payment Method Settings screen appears.

Campus Wear Group Payment Method Settings

Select the payment methods that each group can use.

Payment Methods Allowed

Group	Payment Methods Allowed
Everybody	☑ AmEx
	☑ Discover
	☑ MasterCard
	☑ Visa
	☐ webCheck
	☐ Departmental Charge
Registered Users	☑ AmEx
	☑ Discover
	☑ MasterCard
	☑ Visa
	☑ webCheck
	☐ Departmental Charge

Save

2. For each group shown, select the payment methods that group members can use. In the example above, all shoppers can use

American Express, Discover, MasterCard, and Visa credit cards to purchase items, but a registered user who has logged in can also pay electronically via webCheck (ACH) from a bank account.

3 Click the Save Changes button.

User Modifiers (Buyer Info)

A "user modifier" is a custom field that can be added to the checkout process. For shoppers, user modifiers appear as fields/questions near the conclusion of the checkout process. User modifiers do not add cost to the purchase. These fields are strictly for informational purposes and are used for capturing additional information about customers. The customer responses can be viewed on the Buyer Information report and exported in CSV format.

The following four types of user modifiers can be established for a store:

- **Required Selection**—The shopper is required to make a selection from a dropdown list before the checkout process can be completed. For example, the shopper is required to identify their relationship to the university: student, alumni, parent, staff, or other.

- **Optional Text Entry**—The shopper is asked to enter a text response to a prompt, but the response is not required. For example, the shopper might be asked a demographics question, such as their current occupation.

- **Optional Multiple Select Checkboxes**—The shopper is asked to choose from multiple checkbox options that may apply to themselves or their purchases. This response is not required. For example, the shopper might be asked to indicate which restaurants they have visited in the past year (with the checkboxes listing many hometown restaurants).

- **Required Text Entry**—The shopper is required to enter a text response to a prompt. For example, the shopper might be asked to enter their year of graduation.

Adding a User Modifier

Follow these steps to add a product modifier. Only merchant managers and store managers can add product modifiers.

1 From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > User Modifiers. The Add Store User Modifiers screen appears. Any existing user modifiers are listed at the bottom of this page.

Campus Wear Add Store User Modifier

Modifiers are questions that can be added to collect information about the buyer.

Modifier Types

Required Selection	Example
Optional Text Entry	Example
Optional Multiple Select Checkboxes	Example
Required Text Entry	Example

Current Modifiers

Modifiers applied to this Store: None

2 The modifier types appear as text links. Click the type of modifier that you want to add. The Add User Modifier page appears for the modifier type that you selected.

3 Enter the modifier information and then click the Add Modifier button. (See "Using the Add/Edit User Modifier Pages" below for details on completing the page.)

Using the Add/Edit User Modifier Pages

Four types of product modifier pages are available: 1) required selection, 2) optional text entry, 3) optional multiple select checkboxes, and 4) required text entry. When you add a user modifier, you select a modifier type (as described in "Adding a User Modifier" above) and then complete the fields on the user modifier page.

- **Required Selection Modifier**—You must enter a name for the modifier and its selection values. For example, you might create a modifier with the name of "customer type" and the selections might be student, alumni, parent, staff, and other.

Campus Wear Add User Modifier

Required Selection Modifier requires the buyer to choose a selection from the list.

Back To User Modifiers

Required Selection Modifier

Name:	

The buyer will select from the following entries.

Selection

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

Add More Selections

Add Modifier

- **Optional Multiple Selection Checkbox Modifier**—You must enter a name for the modifier and its selection values. For example, you might create a modifier that prompts the customer to indicate which restaurants they have visited in the college hometown over the past year. The buyer may have eaten at one or more of the restaurants, so buyer can select the checkboxes as appropriate.

Campus Wear Add User Modifier

Optional Multiple Selection Checkbox Modifier presents a list of options to the buyer. To add an option, the buyer marks its checkbox.

Back To User Modifiers

Optional Multiple Selection Checkbox Modifier

Name:	

The buyer will select from the following entries.

Selection

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

Add More Selections

Add Modifier

- **Optional Text Entry Modifier**—You must enter a name for the modifier and the maximum number of characters that a shopper can enter in the text entry field. For example, you might create a modifier that asks, "What is your current occupation?" You can set a maximum number of characters for this field. (The maximum allowed by Marketplace is 100.)

Campus Wear Add User Modifier

Optional Text Entry Modifier allows the buyer to add customized text.

Back To User Modifiers

Optional Text Entry Modifier

Name:	
Maximum Number Of Characters That Can Be Entered (Maximum of 100):	

Add Modifier

- **Required Text Entry Modifier**—You must enter a name for the modifier and the maximum number of characters that a shopper can enter in the text entry field. For example, you might create a modifier that asks, "What is your year of graduation?" You can set a maximum number of characters for this field. (The maximum allowed by Marketplace is 100.)

Editing a User Modifier

Follow these steps to edit a product modifier. Only merchant managers and store managers can edit product modifiers.

1 From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > User Modifiers. The Add Store User Modifiers screen appears. Any existing user modifiers are listed at the bottom of this page.

2 Select the user modifier to be modified by clicking the Edit link in the Other Actions column. The Edit User Modifier page appears.

3 Edit the modifier name and/or the selections (and if necessary add new selections).

4 Click the Save Modifier button.

Deleting a User Modifier

Follow these steps to edit a product modifier. Only merchant managers and store managers can edit product modifiers.

1 From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > User Modifiers. The Add Store User Modifiers screen appears. Any existing user modifiers are listed at the bottom of this page.

2 For the user modifier that you need to delete, click the Remove text link in the Other Actions column. The user modifier is immediately removed.

Note: If a modifier is removed, it will still appear on the Buyer Information report.

5.3 Using HTML in the Store General Settings

You can use HTML in the Return Policy field and the Special Announcement field on the Store General Settings page. You can enter up to 5,000 characters in these fields, including selected HTML tags. By using HTML, you can change how the return policy and/or the special announcement are displayed.

We recommend you become proficient in authoring HTML before you attempt to add HTML tags to the Special Announcement field.

You can include the following HTML tags:

```
<p></p>
<h1></h1>
<h2></h2>
<h3></h3>
<h4></h4>
<h5></h5>
<h6></h6>
<font></font>
<b></b>
<strong></strong>
<i></i>
<em></em>
<br/>
<a></a>
<ol></ol>
<ul></ul>
<li></li>
<hr/>
<sub></sub>
<sup></sup>
<table></table>
<td></td>
<tr></tr>
<style/>
<link/>
<div></div>
<span></span>
<img/>
```

Only the above HTML tags will be recognized by Marketplace. If you place any HTML tags not listed above in either the Return Policy field or the Special Announcement field and attempt to save the entry, the Marketplace Operations Center will display an error message.

Important! If you enter improperly formatted HTML in either the Return Policy field or the Special Announcement field, the Marketplace shopping application may be prevented from displaying properly. You must ensure that any HTML entered in these fields is formatted correctly.

5.4 Adding Accounting Codes

If you use general ledger options, you can create accounting codes in Marketplace that correspond to the accounting codes in your general ledger system.

Merchant managers create the codes to use in credit code selection for products and shipping revenue. When a merchant manager creates an accounting code, it is used only by that merchant's store or uPay site.

Note: Administrators and merchant managers both create accounting codes. Administrators create the codes to be used for tax classes.

```
▼ Marketplace Home
  ▶ System Administration
  ▶ Alumni
  ▶ Athletic Department
  ▼ Campus Stuff
      Settings
    ▪ Accounting Codes
      Users
    ▶ Stores
    ▶ uPay Sites
  ▶ College Merchant
  ▶ Continuing Education
  ▶ Parking
  ▶ Marketplace Reports
    Edit My Profile
```
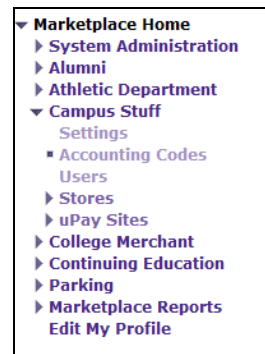
Adding Accounting Codes as an Merchant manager

1 In the Control Menu, go to Marketplace Home > [Merchant Name] > Accounting Codes. The Merchant Accounting Codes screen opens.

2   The common codes listed were created by a Marketplace administrator. To use a common code in the merchant's uStore site, select the code name and click the Add button.

3   To add a new code, click the Add New Accounting Code link. The Add a New Accounting Code screen opens.

Note: The appearance of the Add a New Accounting Code screen will vary for some customers depending on their implementation of accounting codes. For example, PeopleSoft customers will see several additional fields.

4   In the Account Code field, enter the account code used in your general ledger system.

5   In the New Accounting Code Name field, enter the name to display in Marketplace. The name will appear in selection lists of codes. You may want to assign a name that reminds Marketplace users what the code is for.

6   Click the Add button.

Editing Accounting Codes as a Merchant manager

The merchant manager can edit the accounting codes that were added on a merchant level. The merchant manager cannot edit the accounting codes that were added on the administrative level. To edit merchant-level accounting codes, follow these steps:

1 In the Control Menu, go to Marketplace Home > [Merchant Name] > Accounting Codes. The Merchant Accounting Codes screen opens.

2 Click the Edit link for any code in the list.

Current Accounting Codes

Name	In Use?	Actions	
campus stuff books	No	Edit	Delete

3 Update the Account Code or the Account Code Name fields as needed.

4 Click the Save button.

5.5   Creating Store Promotions

A promotion is a limited-time price discount that a store manager applies to a product, group of products, all products, or one or more categories. A store manager who creates a promotion can, if desired, create an e-mail that advertises the promotion and an e-mail distribution list.

The store manager assigns each new promotion a promotional code. Shoppers must know the code to use the promotion. If you use a promotional e-mail, include the code in its text.

To advertise promotions in the store's pages, you might change the store's special announcement, change product descriptions, or link the store's splash image to a promoted category.

Creating a New Promotion

You can create three types of promotions: store-wide, all products in a single category, or for a single product. You can have multiple promotions in your store at the same time.

When you create a promotion, you'll enter this information:

• **Promotion code**—To use the promotion, shoppers enter this code at checkout. You cannot change the code once you create the promotion.

- **Name of Promotion and Promotion Description**—In these fields, enter the promotion's name and description for your records.

- **Promotion Type**—Select either Percentage Off (Each Item) or Dollars Off (Each Item). For store-wide promotions, only Percentage Off is available as the Promtion Type.

- **Value Off**—For percentage off promotion, enter the percentage as a whole number (10 for 10% off). For dollar off promotions, enter the dollar amount to subtract from the price (5 for $5 off). You cannot change the discount once you create the promotion.

- **Allow Unlimited Usage**—Check this box to allow a shopper to use the promotion more than once. To restrict shoppers to one-time use of the promotion, clear this box. You cannot change the use limit once you create the promotion.

- **Start Date and End Date**—Select dates from the calendar, or enter the start and end dates for the promotion in the form mm/dd/yyyy. For example, enter August 4, 2003 as 08/04/2003.

- (Optional) **List of E-mail Addresses Receiving Promotion**—Enter e-mail addresses separated by a delimiter such as a comma or semicolon. In the Delimiter used field, enter the same delimiter you used between e-mail addresses. Mark the Send E-mail checkbox to go directly to the Promotions e-mail page after you create the promotion.

How to Create a Promotion

Follow these steps to create a promotion for your store. Only merchant managers and store managers can create promotions.

1 From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > Promotions. The Promotions screen appears.

2 Click the link for the type of promotion to add.

If you chose a Store-Wide Promotion, the following screen appears.

Add A New Store Promotion

Separate e-mail addresses with a delimiter like a comma or semi-colon. Enter the same delimiter in the Delimiter Used field.

Back To Promotions Management

Promotion Code:
(A random number will be assigned if not provided)

Name of Promotion:

Promotion Description:

Promotion Type:
Percentage Off (Each Item)

Value Off:
For percentage off promotions enter the percentage as a whole number (10 for 10% off) For dollar off promotions enter the dollar amount (5 for $5 off)

From: To:

☑ Allow Unlimited Usage

List of E-mail Addresses receiving Promotion:

Delimiter used to separate E-mail Addresses:

☐ Send E-Mail to specified E-mail Addresses:

Create Promotion

3 Enter the promotion info for the store-wide promotion.

If you want to send an e-mail about the promotion, enter the destination e-mail addresses, separating each address with a delimiter (for example, a comma). Specify the delimiter character in the Delimiter field.

The Product Promotion screen has exactly the same fields as the Store Promotion, plus an opportunity to choose which products the promotion applies to:

Products to Include
☐ Baseball cap w/ Team logo
☐ Baseball cap w/ tennis logo
☐ Sweatshirt with basketball logo
☐ Sweatshirt with football logo
☐ T-shirt with baseball logo
☐ T-shirt with football logo
☐ White coffee cup with Good Idea logo
☐ White coffee cup with college logo
☐ White coffee cup with heart logo
☐ White coffee cup with smiley logo

Likewise, the Category Promotion screen includes an opportunity to choose which category the promotion is for:

Categories to Include
☐ Coffee Cups
☐ Hats
☐ Sweatshirts
☐ T-shirts

4 When you have finished filling out the screen for your promotion type, click the Create Promotion button.

5 If you chose to send a promotional e-mail, the following screen appears.

Complete the fields. Send a test e-mail to yourself if you want to see how the message will look. When you are finished, click the Send E-mail to Recipients button.

Tips for Drafting a Promotional E-mail

Always include the promotional code and your store name in the e-mail. The buyer must enter the promotional code during checkout. Your e-mail should include all information the buyer will need to find promoted products and use the promotion.

Changing an Existing Promotion

You cannot change the promotional code, discount, or usage limit of an existing promotion. However, you can change and save any other information.

1   From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > Promotions. The Promotions screen appears.

2   Click the promotion code link for the promotion you want to change. The Promotion Details screen appears.

3 Make your changes and click the Update Promotion button.

Archiving a Promotion

To re-use a promotional code in the future, archive the promotion. You can archive any promotion, current, future, or expired.

If you archive a current promotion, shoppers cannot use its promotional code. Unless you intend to block the use of a promotion, wait until it has expired before you archive it.

Follow these steps to archive a promotion. Only merchant managers and store managers can archive promotions.

1 From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > Promotions. The Promotions screen appears.

2 Click the Archive link to the right of the promotion you want to archive.

3 Click OK to verify that you want to archive the promotion.

Viewing Promotion Statistics

The promotions statistics show totals of redemptions, orders, quantities, revenues, and discounts applied, and a list of purchased discounted items.

If you created an e-mail list for the promotion, you can also see the redemption rate. This rate shows the percent of your target market that redeemed the offer.

1   From the Control Menu, go to Marketplace Home > [merchant] > Store > [store] > Store Settings > Promotions. The Promotions screen appears.

2   Click the promotion code link to see its statistics in the Promotion Details screen.

5.6   Adding a Store Manager

Your first chance to choose a store manager is when you are adding a store, as described in Section 5.1, "Adding a New Store" on page 75. To add an additional store manager to an existing store follow these steps.

Note: Only a merchant manager can add a store manager.

1   From the Control Menu, navigate to Marketplace Home > [merchant] > Users. The Merchant User Settings screen appears.

2 Click the Add New User link. The Add a New Merchant User screen appears.

3 Enter the new store manager's information.

- **Username**—The unique username you assign cannot be changed either by you or by the new user. Select a username that will be easy for the user to remember.

- **Password**—The password must contain six to twenty alphanumeric characters. In addition, it must contain at least one number and one alphabetic character. You'll need to send the new user the username and password for the initial login, as well as the URL for the Operations Center. The new user should change the password you provide when they login.

  Note: Users cannot use their Operations Center username when shopping on the Marketplace site. They must create a new username.

- **Store Manager**—The Store Manager dropdown menu allows you to select a store. The user you are adding will be store manager of this store.

4 Click the Submit button. You are returned to the Merchant User Settings screen. Notice that the new manager now appears in the list.

5.7   Adding Store Users

Follow these steps to add a store clerk, a store contact,a fulfiller, and a fulfiller with Cancel/Refund Rights .

Note: Only a merchant manager or store manager can add store users.

1 From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > Store Users. The [Store] Users by Roles screen appears.

2 Click the Add New User link. The Add a New User in [Store] screen appears.

Campus Wear Users by Role

Click the user's name to send an e-mail. Click Edit User to change the user's roles.

Add User   **View All Marketplace Users**

Store Managers

Full Name	Username	Action
Gary Johnson	gjohnson	Edit User

Fulfillers With Cancel/Refund Rights

Full Name	Username	Action
Gary Johnson	gjohnson	Edit User

Fulfillers

Full Name	Username	Action
Gary Johnson	gjohnson	Edit User

Store Clerks

Full Name	Username	Action
Gary Johnson	gjohnson	Edit User

Store Contact

Full Name	Username	Action
Gary Johnson	gjohnson	Edit User

3   Complete the fields.

- **Username**—The unique username you assign cannot be changed either by you or by the new user. Select a username that will be easy for the user to remember.

- **Password**—The password must contain six to twenty alphanumeric characters. In addition, it must contain at least one number and one alphabetic character. You'll need to send the new user the username and password for the initial login, as well as the URL for the Operations Center. The new user should change the password you provide when they login.

  Note: Users cannot use their Operations Center username when shopping on the Marketplace site. They must create a new username.

- **Assign Role**—The Assign Role dropdown menu allows you to choose which store user role you want to assign. If you want to

assign more than one role, choose an initial role here, then you can add more roles later. See Section 5.8, "Editing Store Managers" on page 124 for details.

4   Click the Submit button.

5.8   Editing Store Managers

Use the following steps to edit user roles for store managers.

Note: Only merchant managers can edit these roles.

1   From the Control Menu, navigate to Marketplace Home > [merchant] > Users. The Marketplace Merchant User Settings screen appears.

2   Click the Edit User link to the right of the person you want to edit roles for. The following screen appears:

3   To remove a role, click the Remove check box for that role. To add a role, click the Add checkbox for that role.

4   Click the Save Changes button.

5.9   Editing Store User Roles

Follow these steps to edit user roles for store clerks, store contacts, fulfillers with replace/cancel rights, and fulfillers.

Note: Only store managers can edit these roles.

1   From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > Store Users. The [Store] Users/ Roles screen appears.

2   Click the Edit User link to the right of the person you want to edit roles for. The following screen appears:

3 Click the checkboxes to add or remove roles for this user.

4 Click the Add Roles button to save your choices.

5.10 Deleting a Store

To delete a store—and all of its products—use the following instructions:

1 From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > General. The [Store] General Settings page appears.

2 Click the Delete Store button.

When you click the Delete Merchant button, a prompt appears that says "You are about to delete this store. Okay to continue?"

3 Click OK.

The store has been removed from Marketplace and is no longer available. The corresponding store link in the control menu has also been removed.

Important! When you delete a store, any associated products will also be deleted. Before you delete a store, you should review the store and its products carefully. Once a store is deleted, it cannot be restored.
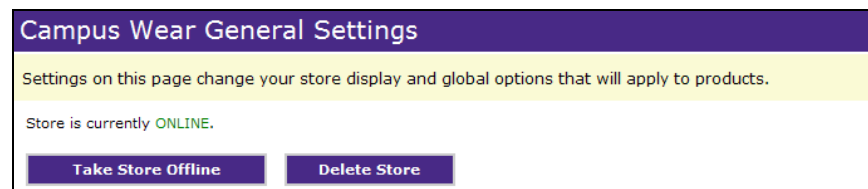
5.11 Moving a Store Online or Offline

By default, new stores are initially offline. After a store's settings have been completed and products have been added, you are ready to bring your store online. Once your store is online, shoppers can view your products and make purchases.

Important! Make sure the store settings have been chosen and products have been added before you bring your store online.

To change your store's online status:

1 In the Control menu, click the Marketplace Home link. Then, click your store name in the home page.

2 In the Control menu, click the General Settings option for your store.

3 To change your store's online or offline status, click the button that appears below the page title. Depending on the store's current status, this button either says Take Store Online or Take Store Offline.

You don't need to take a store offline to make changes, but remember that shoppers in a live site will see the changes as you make them. If your store is online when you make changes, consider whether the changes are likely to confuse shoppers currently in the site. If so, you might want to take the store

offline while you make the changes, or make the changes at a time when fewer people are likely to be shopping.

5.12   Linking to a Store

After you create a store and move it online, customers can visit the store and make purchases/donations. A link for the store will appear on the home page of the Marketplace shopping application (unless the store is in single-store-only mode and the "Store is Viewable in Mall" option is set to "no"). In addition, you can provide customers with a direct link to the store.

By using Marketplace's mall concept, in which all Marketplace stores are available from the Marketplace home page, you can encourage customers to view additional stores and foster additional shopping revenue for other stores. However, in some instances you may choose to focus customer attention on just your own store. In this situation, you can provide customers with a direct link to your store. You can even go a step further by putting your store in single-store-only mode, which has the effect of removing links from your store that would allow customers to navigate to the Marketplace home page, where they might discover other shopping opportunities. For more information about turning on single-store-only mode, see "Adding a New Store" on page 75.

How to Link to a Store

The easiest way to determine the link for a store is to navigate to that store through the Marketplace shopping application after bringing the store online. You can then copy the URL that appears in the address field of your browser. This URL can then be used in e-mail messages to customers or on web pages that need to link to the store.

If a store is in single-store-only mode, however, you need to understand the format of the URL because parameters in the URL are required for activating the single-store-only mode. In addition, if the store is in single-store-only mode and the "Store is Viewable in Mall" option is set to "no," you won't be able to visit the store through the Marketplace shopping application. In this situation, you must understand the store URL format so that you can piece together the store URL.

In addition, you will also need to understand the store URL format if you would like to determine the URL for a store before bringing a store online.

Store URL Format

Marketplace stores use the following format for URLs:

> http://[server]/[context]/web/
> store_main.jsp?STOREID=[ID#][&SINGLESTORE=true]

[server] is the computer where Marketplace uStores was installed, and [context] is the context path. The default value of [context] is **ustores**. If you do not know the server name or the context path, you should contact your Marketplace administrator.

[ID#] is the Store ID given by the Marketplace Operations Center when the store was established. This value is available on the General Settings page of the store.
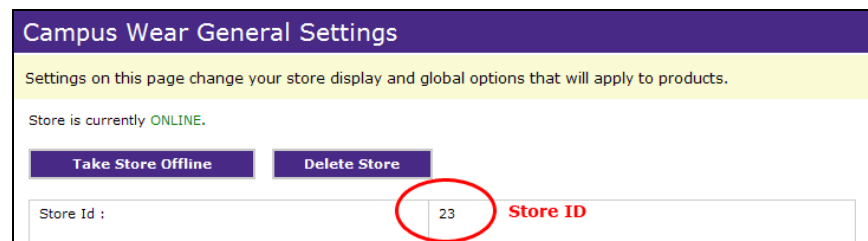
The Store ID is displayed on the [Store] General Settings page.

[&SINGLESTORE=true] is necessary if single-store-only mode has been activated for the store. By adding this parameter to the store URL, the store will be launched in single-store mode, which means the store will exist as a separate web site unconnected to other Marketplace stores. If this parameter is omitted from stores in single-store mode (and the "Store is Viewable in Mall" option is set to "Yes"), then links to the Marketplace home page will appear, and customers can navigate to additional stores.

Note: If single-store-only mode has been turned on—and "Store is Viewable in Mall" has been set to "No"—the store is only viewable by using the "SINGLESTORE=true" parameter. In this case, if a customer uses a store URL without the "singlestore=true" parameter, they will see an error message that indicates the store is not accessible.

An Example of Linking to a Store

For this example, we will use the following values: [server] is "touchnet.edu," [context] is "ustores," and [ID#] is 38. In addition, single-store mode has been turned on.

The store URL would look like this:

> http://www.touchnet.edu/ustores/web/
> store_main.jsp?STOREID=38&SINGLESTORE=true

Note: SINGLESTORE must be in uppercase. This parameter is case sensitive.

6.0   Adding Products to a Store

After you've set up at least one shipping class and one category, you can start adding products to your store.

There are two ways to add products.

- One at a time, using the Add a New Product Wizard in the Operations Center (See "Adding a Single Product Using the Wizard" on page 131).

- Or, you can build a product import file to add multiple products at the same time (See "Importing Product Lists" on page 148).

Rules and Tips

When adding products, keep these rules and tips in mind:

- **If a product has options** (like size or color), use the Add a New Product Wizard. You can't include options in a product import file.

- **With either method,** you can add a product but choose not to enable it for immediate display.

- **If you don't know some product details,** leave those fields empty—or, in the product import file, include temporary text as a substitute for the real information. Add the product but leave it disabled. Then, edit the product and enable it later.

- **If a product has modifiers** (like a personal monogram), first add the product, then edit it to include the modifier features.

You can edit a product's details anytime after you add the product. The fields to change a product are the same as those to add a product.

6.1   Adding a Single Product Using the Wizard

The Add a New Product Wizard makes adding products simple. Just follow the screens. Before you get started, make sure you understand the concepts of options. Depending on your product, you may need to add options as you work through the wizard.

Products With Options

An "option" is a factor like size or color that changes a product's stock number. Using options lets you group related stock numbers (also known as

stock keeping units, or SKUs) into a single product for display. Each combination of options results in a separately tracked "article."
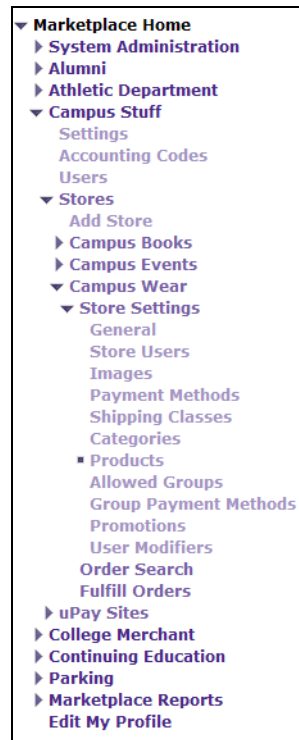
For instance, you might offer a shirt in three colors. Instead of adding three products, enter the shirt as one product with three options.

As you go through the Add a New Product Wizard, you will have an opportunity to set up options for your product, if necessary.

Important! If an optional product feature doesn't result in different stock numbers or separately tracked inventories, use a modifier instead to simplify product entry. See "Products With Modifiers (Custom Ordering Options)" on page 146 for more details.

The Add a New Product Wizard

Follow these steps to add a single product. Merchant managers, store managers, and store clerks can add products.

1 From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > Products. The Store Product Management screen appears.

2 Click the Add a New Product link. The Add a New Product Wizard: Step 1 screen appears.

3 Complete the following fields:

- **Product Name**—Shoppers see the product name when browsing in the site. It also appears in order and billing confirmations, store financial reports, and fulfillment event records.

- **Short Description**—Shoppers see this short product description in the detailed product layout. This field accepts a maximum of 500 characters. This field accepts HTML. Depending on the chosen store or category layout, shoppers may add some products to the cart without seeing the long descriptions. Put critical details in both the short and long descriptions to make sure shoppers see this information.

- **Long Description**—Shoppers see this description when they go to a product detail page. Price and options (such as size and color) appear below the description on the product detail page. You may want to use the long description to provide shoppers with additional information about the available options. If the product requires special shipping information or if its return policy differs from the store policy, you can add those details here. Depending on the chosen store or category layout, shoppers may add some products to the cart without seeing the long descriptions. Put critical details in both the short and long descriptions to make sure shoppers see this information. The Long Description field accepts a maximum of 30,000 characters. This field accepts HTML.

  Note: You can use HTML in both Short Description and Long Description. For more information about the allowable HTML tags, see "Using HTML in Product Descriptions" on page 145.

- **Price**—This price is the base price for the product. The price can be affected by options and modifiers. If the Product Type is "Donation," do not enter a price.

4 Choose a product type.

- **Generic**—This product type encompasses a wide range of products. Typically, these are physical products that require shipping (or pickup by the customer), but they may also be conference/seminar registrations.

- **Digital**—A digital product (e.g., a PDF, an audio file, a video file, a Flash presentation, a Microsoft PowerPoint presentation, etc.) that can be downloaded by the customer. Typically, these products do not require shipping; however, it is possible to use this product type to create a digital product and also request a shipping address so that a physical copy of the file (or a related product or document) could be shipped to the customer. Before you select Digital as the Product Type, you must ensure that a shipping class

has been created that is appropriate for digital products. For example, in many cases you'll need a shipping class of "none." See "Shipping Classes When Delivery is Not Required" on page 143 for more information.

- **Donation**—If you select Donation as the Product Type, you need to ensure that a shipping class has been created that is appropriate for donations. See "Shipping Classes When Delivery is Not Required" on page 143 for more information.

5 Choose the allowed payment methods for this product.

Important! If you do not choose any payment methods, the product will not be displayed to shoppers. For the product to be displayed, you must choose at least one payment method.

---

6 Enter the number of days to wait before fulfilling an order paid for using the ACH payment method.

Note: The waiting period allows time for Payment Gateway to return any notice that the ACH payment was rejected. Please consult your Payment Gateway administrator for an acceptable time period. The waiting period can be overridden by a fulfiller with refund/cancel rights.

7 Click the Continue button. The Step 2 screen appears.

8 Complete the following fields.

- **Prompt for Donation amount**—(Donation only) You can customize the prompt that asks the customer for the donation amount.

- **Choose Shipping Class**—Choose a shipping class that contains delivery methods appropriate for the product. If the product type is "Digital" or "Donation," see "Shipping Classes When Delivery is Not Required" on page 143 for more information about setting up a shipping class appropriate for donations. For more information about shipping classes, see "Shipping Rates" on page 95.

- **Choose Tax Class**—Choose a tax class appropriate for the product. For more about tax classes, see "Tax Account Codes" on page 56.

- **Store Default Account Code and Accounting Code Override**—These fields are only present if the Perform General Ledger Updates option was selected when the store was established. For store's that use the general ledger system, the store's default accounting code is displayed. You can choose either to use the default accounting code or select an override from the Accounting Code Override dropdown menu. For more information about accounting codes, see Section 5.4, "Adding Accounting Codes" on page 111.

- **Special Authorization Required to Purchase?**—If the purchase of this product requires the customer to provide additional information that can be used to authorize the purchase (such as a student ID number), choose the Yes radio button. Also, enter text in the "If yes, enter prompt displayed to buyer" field. This prompt will appear on the product page and ask the buyer to enter additional information. No authentication will take place on the value the buyer enters in this field; however, this value can be viewed during the fulfillment process, allowing the fulfiller to determine how the order should be processed.

   Note: If you would like buyers to be authenticated before they purchase this product, you should establish a user group. For more information, see Section 4.3, "User Groups and User Authentication" on page 70.

- **Shipping/handling message**—This message will appear on the packing slip that is printed during the fulfillment process. This message can contain special handling instructions required for the shipping of this product.

9 Click the Continue button. The Step 3 screen appears.

Add A New Product Wizard : Step 3

Use graphics in JPG, GIF, or PNG formats. Maximum file size is 250K.

Back To Product Management

Upload images for sweatshirt:

(max W x H = 250 x 250 pixels)
Click here to upload full size image

(max W x H = 80 x 80 pixels)
Click here to upload thumbnail image

Cancel   **Continue**

10 Click the upload links to launch the upload dialog window, which allows you to browse for images on the hard drive as well as network locations. Follow these guidelines when choosing images:

- You can only use GIF, JPG, or PNG format images.

- Full size product images are best displayed at 250 pixels wide by 250 pixels high.

- Thumbnail product images are best displayed at 80 pixels wide by 80 pixels high.

- All images must have file sizes of 250K or less.

Note: The file name of each image must be unique within a store. If you upload an image that uses the same name as another image within the same store, the original image will be overwritten. So remember to always use unique names for images.

11 Click the Continue button. The Step 4 screen appears.

Add A New Product Wizard : Step 4

Options are used to record different SKUs, or inventoried articles, for a product. Size and color defaults are provided, or you can create custom options.

Back To Product Management

Adding Product: sweatshirt

Does this product have options associated with it, such as size or color, that affect inventory or stock #?   ○ Yes   ● No

Cancel   **Continue**

If the product will be available in variations (such as small and large or white and red) and you would like to keep track of the inventory for each variation, click the Yes radio button and then the Continue button. The Add A New Product Wizard now follows an alternate branch that allows you to specify the product variations. First, you're

asked to specify the types of variations ("options") to use. For digital products, you might use options for file size or file format.

Add A New Product Wizard : Options

Select or enter up to four product options.

Back To Product Management

Adding Product: sweatshirt

Please select the options associated with this product, or name your own.

- ☐ Size
- ☐ Color
- ☐ Other, enter name: _____
- ☐ Other, enter name: _____

Cancel   **Continue**

For generic products, both "size" and "color" can be selected (while for digital products, "file size" and "file format" are available); however, you can also name additional variation types (such as height, weight, volume, etc.). After you've selected the variation types (or entered new types), click the Continue button.

Add A New Product Wizard : Options

When ordering the product, buyers will select from the options you enter.

Back To Product Management

Adding Product: sweatshirt

For option "Size", enter the possible values:

1.
2.
3.
4.
5.
6.

Current values:

(None)

For option "Color", enter the possible values:

1.
2.
3.
4.
5.
6.

Current values:

(None)

Cancel **Add More** **Continue**

Now, you're asked to specify the permutations of each variation. For example, if you selected "size" on the previous page, you can now enter the name of each size permutation, such as small, medium, and large. Or if you selected "color" on the previous page, you might now enter white, red, and yellow. You're initially given six fields in which to name the permutations of a given product variation. If you need to record more than six permutations for a product, click the Add More button.

Important! If variations of a product are necessary, be sure to set up the product with these variations when you add the product to Marketplace. You cannot add variations to existing products.

12 On the Additional Product Info page of the "Add a New Product Wizard," the available fields depend on the product type.

- **Limit Quantity?**—(Generic and Donation only) Mark Yes to limit the quantity of the product that a shopper can purchase. If yes, enter the maximum order quantity.

- **Track inventory?**—(Generic and Donation only) Mark Yes to track the product's inventory. If yes, enter the initial inventory quantity.

- **Back orderable?**—(Generic and Donation only) Mark Yes if a shopper can order the product even when the quantity available is zero.

- **Upload product file**—(Digital only) When you select this link, you can browse to a file and select it for upload. If you added options to the product (such as file format or file size, see Step 12 above), you'll be able to upload a different digital file for each combination of options.

- **Maximum times customer can request download?**— (Digital only) This option can be used to restrict the total number of times a customer can download a digital file.

- **Time limit for downloading?**—(Digital only) This option can be used to place a time limit—in days—on the period during which the digital product can be downloaded.

- **Auto fulfill?**—This option can be used for any product in which the payment should take place at the time the order is submitted versus when the order is fulfilled. Typically, this option would be used for products in which no shipping is involved, such as donations or digital products. It could also be used for some generic products (e.g., for conference registrations when no materials are shipped to the customer).

  Note: (For donations only) In order for the recurring payments option to be available, the Auto Fulfill option must be set to Yes. In addition, the recurring payments options must also be selected in the store's general settings.

- **Stock #**—You must enter a stock number for all products, including digital products and donation products. This number can be a UPC number or any other number of value to your store or organization. If necessary, you can allow Marketplace to assign a stock number for tracking and reports: click the Assign Random Stock # button. If you manually enter a stock number, you can have Marketplace check to determine if the stock number is already in use: select the "Check to see if stock number is already used" checkbox.

If your product does not have options, you only have to fill out this screen once. However, if you established product options, you will notice text in the upper left of the page that says, "Article #1 of ## - [option combination name]." This means you are entering information for that option combination and you will need to fill out this screen for

each option combination. For option combinations, two additional fields appear on the Step 5 page:

- **Price**—For each option combination, you can set a different price. For example, you might need to charge more for an extra-large shirt versus a small shirt (or more for a blue shirt than a white one). The price you enter on the Step 5 page overrides the price that you entered on Step 1.

- **This particular article is not available**—If an option combination is not valid for your store, or if a combination is not currently available, you can use this checkbox to disable the combination. If at a later day you need to enable the option combination, you can do so by navigating to the Product Option page.

13 Complete the screen. If an article is not available (for example, if it is backordered), click the checkbox.

14 Click the Continue button when you are finished. The Step 6 screen appears.

Add New Product to Campus Wear

A disabled product is not displayed to buyers. You can change its features, then enable it later through the Products page.

Back To Product Management

Adding Product: sweatshirt

All required information about this product has been collected. You can always edit the information later.

To add this product to your store, click "Add Product".

☐ Disable this product for now.

Cancel   **Add Product**

---

15 Click the checkbox to disable the product temporarily, if desired.

Note: If you plan to add modifiers, as described in "Products With Modifiers (Custom Ordering Options)" on page 146, you should check the "Disable this product for now" checkbox. By taking this action, you can set modifiers for the product before it goes live in your store.

16 Click the Add Product button. The Step 7 screen appears.

Add A New Product Wizard : Step 7

To select multiple Marketplace categories, press the CTRL key, then click the category names.

Back To Product Management

Thank you.

The product "running shoes" has been added to your store.

Please assign "running shoes" to appropriate categories below.

Choose Marketplace Categories (optional, up to 3)

> Apparel
> Events
> Office Supplies
> Downloads
> Give to TU

Choose In-Store Category   (Not Shown to Buyer) ▼

Continue

---

17 Assign your product to Marketplace categories (for more information, see "Categories" on page 47) and an in-store category (for more information, see "Store Categories" on page 98).

18 Click the Continue button. Your product has been successfully added to your store!

Shipping Classes When Delivery is Not Required

For the product types of "Digital" and "Donation," you need to ensure that a shipping class has been created in which the delivery method of N/A (or None) has been enabled. Take the following actions to set up a shipping class.

1   From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > Shipping Rates. The Shipping Rates screen appears.

2   Review the shipping classes displayed on this screen to determine if a shipping class appropriate for donations has already been created. In a shipping class appropriate for donations, the Enabled checkbox will be checked for the delivery method of N/A (or None), and the other delivery methods in the shipping class will not be enabled. This shipping class should be named "No Shipping Required" (or something similar). If this shipping class does not exist, proceed to Step 3.

3   Click the Add New Shipping Class text link. A pop-up window appears.

4   Enter "No Shipping Required" in the Enter New Shipping Class Name field and click OK. The Shipping Rates screen is refreshed with the new shipping class added.

Shipping Class: No shipping required

DeliveryMethod	Enable?	Base Charge ($)	Per Additional Item Charge ($)	Require Shipping Address?	Allowed Countries	Tax Class
None	☑	0.00	0.00	☐	N/A	default tax rate
Walk-In	☐	0.00	0.00	☐	N/A	default tax rate
US Mail	☐	0.00	0.00	☐	N/A	default tax rate
International	☐	0.00	0.00	☐	N/A	default tax rate
UPS	☐	0.00	0.00	☐	N/A	default tax rate
FedEx Ground	☐	0.00	0.00	☐	N/A	default tax rate

Default Delivery Location:

City:	Lenexa
State:	Kansas
ZipCode:	66219

Save No shipping required Shipping Class

5   Select the Enable checkbox for the delivery method of N/A (or None).

6   Enter zero as the Base Charge for the N/A delivery method.

7 Enter zero as the Per Additional Item Charge for the N/A delivery method.

8 Uncheck the Require Shipping Address checkbox for the N/A delivery method.

Note: For more information regarding the establishment of shipping classes and delivery methods, see "Shipping Rates" on page 95 and "Delivery Methods" on page 52.

Donations and Recurring Payments

The Recurring Payment Setup page will appear as part of the Add a New Product Wizard if the following conditions have been met:

9 The Allow Recurring Payments on Products option has been turned on in the store's general settings.

10 Donation was selected as the Product Type in Step 1 of the Add a New Product Wizard.

11 The Auto Fulfill option was set to Yes on the Additional Product Info page of the Add a New Product Wizard.

If these conditions are met, the Recurring Payment Setup page will appear as part of the Add a New Product Wizard immediately after the Additional Product Info page. (For more information about the Add a New Product Wizard, see "The Add a New Product Wizard" on page 132.)

Follow these steps to complete the Recurring Payment Setup page:

1 Complete the following fields.

- **Allow Recurring Payments?**—If you set this option to Yes, complete the rest of the options for the page. If you set the option to No, skip the rest of the options on this page.

- **Recurring Payments are required?**—If you want to require customers to use recurring payments, select Yes. Otherwise, select No.

- **Prompt Displayed to User Asking if Recurring Payments are Desired**—This field determines the prompt text that asks the customer whether they want to make a recurring payment. The prompt appears when the customer adds the donation product to their shopping cart.

- **Maximum Duration**—Enter a number and specify whether it is a number of months or years. The most you can allow is 6 years. If you leave the number field empty, the maximum duration will be 6 years.

- **Accepted Frequencies**—When making a recurring payment, the customer is asked, "How often will your payment recur?" The frequency options you check here will appear in the dropdown selection list for the customer.

2 Click the Continue button.

Using HTML in Product Descriptions

You can use HTML in the Short Description field and the Long Description field in the Add a New Product Wizard. You can enter up to 500 characters in the Short Description field and 30,000 characters in the Long Description field, including selected HTML tags. By using HTML, you can change how the product descriptions are displayed.

We recommend you become proficient in authoring HTML before you attempt to add HTML tags to the product description fields.

You can include the following HTML tags:

```
<p></p>
<h1></h1>
<h2></h2>
<h3></h3>
<h4></h4>
<h5></h5>
<h6></h6>
<font></font>
<b></b>
<strong></strong>
<i></i>
<em></em>
<br/>
<a></a>
```

```
<ol></ol>
<ul></ul>
<li></li>
<hr/>
<sub></sub>
<sup></sup>
<table></table>
<td></td>
<tr></tr>
<style/>
<link/>
<div></div>
<span></span>
<img/>
```

Only the above HTML tags will be recognized by Marketplace. If you place any HTML tags not listed above in either the Short Description field or the Long Description field and attempt to save the entry, the Marketplace Operations Center will display an error message.

Important! If you enter improperly formatted HTML in either the Short Description field or the Long Description field, the Marketplace shopping application may be prevented from displaying properly. You must ensure that any HTML entered in these fields is formatted correctly.

Products With Modifiers (Custom Ordering Options)

A "modifier" is a custom ordering option, like monogramming. It doesn't change the stock number of the product, but it might change the price.

Modifiers aren't part of the basic product setup. After you add a product, you can edit it with one of these kinds of modifiers:

- **Required Selection**—The shopper must select from options to add the product to the cart. For example, if a shopper is purchasing a baseball cap, they might be given the option of adding a simple campus logo, a more elaborate campus logo, or no logo.

- **Optional Text Entry**—The shopper can choose to customize a product with text. For example, the shopper might be able to add a monogram to a pen set or a shirt.

- **Optional Multiple Select Checkboxes**—The shopper can choose from customizing options. For example, the shopper might be able to add ingredients to a pizza by selecting these checkboxes.

- **Required Text Entry**—The shopper must enter a value to add the item to the cart. For example, the shopper might need to enter their student ID number when signing up for a seminar.

Note: When a shopper purchases a product, a confirmation message is sent to the shopper. This message displays the modifier value. However, if you are collecting sensitive information with the Optional Text Entry modifier or the Required Text Entry modifier (such as a student ID or a social security number), you should suppress display of the modifier in confirmation email messages. You can suppress display of the modifier by choosing the checkbox labelled Hide Modifier in Confirmation E-mails on the setup page for the modifier.

Adding a Product Modifier

Follow these steps to add a product modifier. Only merchant managers and store managers can add product modifiers.

1 From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > Products. The Store Product Management screen appears.

2 Select the product's category from the Jump to Category dropdown menu. The Store Product Management screen is refreshed with the products from the selected category.

3 Click the product name link. The Store Product Details screen appears.

4 Scroll down to the bottom of the screen and click the Add New Modifier link. The Add Product Modifier screen appears.

Campus Wear Add Product Modifier

Modifiers are questions that can be added to collect information about the product. A modifier does not change the product's inventory, but can alter the product price.

Back To Product Detail

Modifier Types

Required Selection	Example
Optional Text Entry	Example
Optional Multiple Select Checkboxes	Example
Required Text Entry	Example

5 Click the modifier type you want to add.

6 Enter the modifier information and price adjustment(s). Then click the Add Modifier button.

Note: For detailed information about each modifier type, see "Using Product Modifiers" on page 161.

6.2   Importing Product Lists

You can import multiple products using a product import file.

<div style="float:left; width:30%; text-align:right;">

Creating the Product Import File

</div>

Use any text editor to create your product import file with each row in the file describing a single product. The entries for each product, which are similar to those in the Add a New Product Wizard, are separated by commas. Save the file in CSV (comma-separated value) format.

Keep in mind these rules and tips:

- **Don't include products that use options**. For products with options like size or color, use the Add a New Product Wizard. Marketplace product options are not supported when using a product import file.

- **Use temporary values if needed**. If you don't know all the product's details, enter temporary values. Import the product, then edit it with the Operations Center.

- **Save the file with a descriptive name**. You may have more than one import file. Use file names that you will recognize when you import the products.

- **After import, check the product information**. Edit each imported product to verify its details and add any others. For instance, you must edit the product to add its graphics or choose its site categories.

- **After import, move products to the right categories**. With the default layout for the store home page, imported products appear on the store home page. With the splash layout for the home page, imported products are added to the "Not Shown to Buyer" category, which means you will need to move each product to an appropriate category in order for it to be displayed in your store.

  Note: With the splash layout selected for the home page, you should not select "Store Home Page" as the category for a product. This category will not display products in the splash layout. As a reminder, the Jump to Category dropdown list on the Product Management screen will display "Store Home Page - Not Displayed."

- **Payment types are determined by store settings**. The default payment types configured in the store settings determine the payment types for each product in the import file. If you need to alter the allowable payment types for a specific product, you should import the product and then edit the product with the Operations Center.

About the CSV Format

In the CSV format, values are separated by commas. You can use one or two sets of quotation marks around a value. If an entry includes a comma, the entire entry must be contained inside quotation marks.

If an entry includes quotation marks, include them with a double set of quotation marks. For example, the entry "Item 3" would yield the result Item 3, while the entry "Item ""4"", size small" would yield the result Item "4", size small.

Steps in Creating the File

1   In a text file, enter the row of required column headings (see "Required Column Headings" on page 149).

2   To the row, add any optional column headings you want to use (see "Optional Column Headings" on page 150).

3   In a new row, enter the values for the first product. Enter all the required values. To leave an optional value empty, enter a comma only.

4   Add a new row for each additional product, then save and close the file.

Required Column Headings

Enter these column headers on the first row or line of the file exactly as shown here:

```
NAME,SHORT_DESC,LONG_DESC,SHIP_CLASS,PRICE,PRODUCT_TYPE
```

Under each required column, enter the values for your product. If you don't know all of a product's details, enter temporary values. Import the product, then edit it later in the Manage Products pages.

Field definitions:

NAME
Name of the product. Maximum 50 characters.

SHORT_DESC
Short description of the product. Maximum 100 characters.

LONG_DESC
Long description of the product. Maximum 2000 characters.

SHIP_CLASS

Name of the Shipping Class for the product. Must match an existing shipping class name in the store.

PRICE

Product price. Use the format x.xx, with up to two decimal places. Do not use commas or dollar signs. Do not use negative numbers.

PRODUCT_TYPE

Enter Donation for a donation product. Otherwise, enter Generic. (Donation products must have a price of 0.00.)

Optional Column Headings

These columns are optional. If you include one of these columns, its column header must appear on the first row or line of the file.

```
QTY,BACK_ORDERABLE,STOCK_NO,ENABLED,AUTH_REQD,AUTH_PROMPT,
TAX_CLASS,  CREDIT_ACCOUNT
```

Enter an optional value under its correct column heading. You can change this and all other product entries later in the Manage Products pages.

To leave an optional value blank, enter only a comma. For example, the first product here uses all four optional values. The second product doesn't use the stock number value. (Required columns not shown.)

```
QTY,BACK_ORDERABLE,STOCK_NO,ENABLED
15,Y,Z765-OT3,Y
35,Y,,Y
```

Field definitions:

QTY

Quantity available. If this column is not used, the quantity available will not be tracked. You can change this entry later in the Edit Product page.

BACK_ ORDERABLE

Signals whether the product may be purchased with back-order status. Enter Y if the product is back-orderable. Enter N if the product is not back-orderable. If the column or value is not used, the product is imported as "not back-orderable."

STOCK_NO

Stock number. Maximum 30 characters. If the column or value is not used, a random number will be assigned.

ENABLED

Signals whether product should be enabled for display. Enter Y to display the product immediately. Enter N to leave the product disabled. If the

column or value is not used, the product will be enabled and displayed for purchase.

AUTH_REQD

Signals whether authorization is required to purchase the product. Enter Y if authorization is required, otherwise enter N. If the column or value is not used, the product will be imported as "no authorization required."

AUTH_PROMPT

Prompt displayed to the user if authorization is required. Maximum 200 characters. Must be filled in if authorization is required.

TAX_CLASS

Tax class name. Must be one of these: No tax, Default tax rate, or Higher tax rate. If the column or value is not used, the product will use the Default tax rate class set up by the administrator.

CREDIT_ ACCOUNT

Only use this column if you are transferring data to a General Ledger system. Enter a value if the accounting code for the product is different than the store's default accounting code. To use the default accounting code, leave the column blank by entering only a comma.

Importing a CSV File

After you have created a CSV file, use the following steps to import the file.

1   From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > Products. The Product Management screen appears.

2   Choose the "Import Product(s) from a File" link. The Product File Upload screen appears.

3   Choose import options.

- **Check for errors only**—Use this option to test the import without saving products and see if any errors exist in the CSV file. If you choose this option, Marketplace will return a list of the errors that it encounters, such as shipping classes or accounting codes that are used in the CSV file but not available for products in the store.

- **Check to see if stock number is already used**—Use this option to determine if the products in the CSV file are using unique stock numbers that have not previously been assigned to products.

4   Either enter the path of the CSV file or click the Browse button to locate the file.

5   Click the Upload Now button. The Upload Status screen appears. Messages are displayed on this screen and these messages either represent errors with the import file or confirm that products were imported.

Gary's Store Upload Status

Processing Complete!
Messages and other Information are below

Errors on Line: 3
SHIP_CLASS specified is not found in the list of Store's shipping classes

The following lines were processed and added to the database.

Line #	Product Id	Product Name
1	75	Stapler5
2	76	Stapler6

Using a CSV File to Edit Products

You can edit products in Marketplace by using a CSV file. To edit a product, the stock number must be identical in both the Marketplace store and the CSV file.

Use the following steps to import a CSV file for editing products.

1   From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > Products. The Product Management screen appears.

2   Choose the "Import Product(s) from a File" link. The Product File Upload screen appears.

3   Verify that the "Check to see if stock number is already used" checkbox is selected.

4   Either enter the path of the CSV file or click the Browse button to locate the file.

5 Click the Upload Now button. The Upload Status screen appears. Messages are displayed on this screen and these messages 1) represent potential errors with the import file, 2) confirm that products were imported, and 3) list the products that will be edited.

Note: For each product you are editing, Marketplace will return a warning on the Upload Status screen that says the stock number is in use.

6 Confirm each product that should be edited by choosing the corresponding checkbox in the Update Database column.

7 Choose the Update Products button.

6.3   Managing Products in a Store

After products have been added to a store, the Product Management page can be used (by merchant managers, store managers, and store clerks) for the following purposes:

- To edit product features

- To move a product to a different category for display

- To enable or disable product display

- To change the display listing order of products within a category

- To delete a product

To open the Product Management page, the store manager or merchant manager navigates to Marketplace Home > [merchant] > Store > [store] > Store Settings > Products. The Store Product Management screen appears.

Editing Products

To edit a product:

1   From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > Products. The Store Product Management screen appears.

2   Select the product's category from the Jump to Category dropdown menu. The Store Product Management screen is refreshed with the products from the selected category.

3   Click the product name link. The Store Product Details screen appears.
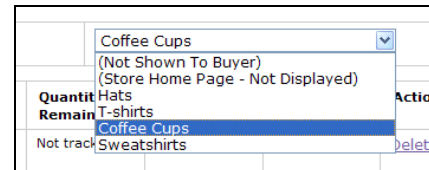
Note: To change the features of a particular article (or SKU) associated with a product, click the product's View Articles link. Then, click the article name to edit its features.

4   You can edit the fields on The Store Product Detail screen.

Field descriptions:

- **Product Name**—Shoppers see the product name when browsing in the site. It also appears in order and billing confirmations, store financial reports, and fulfillment event records.

- **Short Description**—Shoppers see this short product description in the detailed product layout.

- **Long Description**—Shoppers see this description when they click the product name within a category. You may want to use your long description to preview or advertise available options. If the product requires special shipping information or if its return policy differs from the store policy, you can add those details here.

- **Price**—This price is the base price for the product. The price can be affected by options and modifiers. If the Product Type is "Donation," do not enter a price.

- **Shipping Class**—Choose a shipping class that contains delivery methods appropriate for the product. If the product type is "Donation," see "Shipping Classes When Delivery is Not Required" on page 143 for more information about setting up a shipping class appropriate for donations. For more information about shipping classes, see "Shipping Rates" on page 95.

- **Tax Class**—Choose a tax class appropriate for the product. For more about tax classes, see "Tax Account Codes" on page 56.

- **Store's Default Account Code and Accounting Code Override**—These fields are only present if the Perform General Ledger Updates option was selected when the store was established. For store's that use the general ledger system, the store's default accounting code is displayed. You can choose either to use the default accounting code or select an override from the Accounting Code Override dropdown menu. For more information about accounting codes, see Section 5.4, "Adding Accounting Codes" on page 111.

- **Special Authorization Required to Purchase?**—If the purchase of this product requires the customer to provide additional information that can be used to authorize the purchase (such as a student ID number), choose the Yes radio button. Also, enter text in the "If yes, enter prompt displayed to buyer" field. This prompt will appear on the product page and ask the buyer to enter additional information. No authentication will take place on the value the buyer enters in this field; however, this value can be viewed during the fulfillment process, allowing the fulfiller to determine how the order should be processed.

Note: If you would like buyers to be authenticated before they purchase this product, you should establish a user group. For more information, see Section 4.3, "User Groups and User Authentication" on page 70.

- **Shipping/handling message**—This message will appear on the packing slip that is printed during the fulfillment process. This message can contain special handling instructions required for the shipping of this product.

- **Limit Order Quantity?**—Mark Yes to limit the quantity of the product that a shopper can purchase. If yes, enter the maximum order quantity.

- **Track inventory?**—Mark Yes to track the product's inventory. If yes, enter the initial inventory quantity.

- **Back Orderable?**—Mark Yes if a shopper can order the product even when the quantity available is zero.

- **Stock #**—You must enter a stock number for the product. This number can be a UPC number or any other number of value to your store or organization. If necessary, you can allow Marketplace to assign a stock number for tracking and reports: click the Assign Random Stock # button. If you manually enter a stock number, you can have Marketplace check to determine if the stock number is already in use: select the "Check to see if stock number is already used" checkbox.

- **Allowed Payment Methods**—Choose allowed payment methods for this product using the checkboxes.

- **Days to Wait before processing ACH Payments**—Enter the number of days to wait before fulfilling an order paid for using the ACH payment method. The waiting period allows time for Payment Gateway to return any notice that the ACH payment was rejected. Please consult your Payment Gateway administrator for an acceptable time period. The waiting period can be overridden by a fulfiller with refund/cancel rights.

5 If you edited any of the fields described above, click the Save button.

6 Marketplace Category Assignments—You can edit the product's system-level category assignment. (For more information about system-level categories, see "Categories" on page 47.) To add a system-level category assignment, click the category name in the New Assignment list box. You can use CTRL-click to select multiple categories and SHIFT-click to select a range of categories. Then click the Submit button. To remove a current assignment, select the checkbox for the corresonding category name displayed in the Current column. Then click the Remove Selected button.

7 Product Image Management—You can upload product images. Click the upload link to launch the upload dialog window, which allows you to browse for images on the hard drive as well as network locations. Follow these guidelines when choosing images:

- You can only use GIF, JPG, or PNG format images.

- Full size product images are best displayed at 250 pixels wide by 250 pixels high.

- Thumbnail product images are best displayed at 80 pixels wide by 80 pixels high.

- All images must have file sizes of 250K or less.

Note: The file name of each image must be unique within a store. If you upload an image that uses the same name as another image within the same store, the original image will be overwritten. So remember to always use unique names for images.

8 Modifiers applied to this Product—You can add modifiers to products as well as edit existing modifiers. A "modifier" is a custom ordering option, such as monogramming. It doesn't change the stock number of the product, but it might change the price. Modifiers aren't part of the basic product setup.

If any modifiers have been created for the product, the modifiers are listed in the Modifiers section of the Product Details page. The Modifiers section can be used for the following purposes:

- To add a new modifier: click the Add New Modifier text link. For details about adding product modifiers, see Section 6.4, "Using Product Modifiers" on page 161.

- To edit an existing modifier: click the Edit link of the corresponding modifier. For details about editing product modifiers, See 6.4, "Using Product Modifiers" on page 161

- To remove an existing modifier: click the Remove link of the corresponding modifier.

- To determine the display order of the product's modifiers: enter a sort number in the Sort Key text box of each modifier and then click the Save Changes button. The sort order determines the order that modifiers are displayed on the shopping site's Item Detail Page. This page is displayed after shoppers click the Add to Cart button.

Editing Donations

Donations can be edited like generic products; however, two additional fields appear. These fields are 1) Prompt for Donation Amount and 2) Recurring Payments.

Note: In order for the Recurring Payments field to be available, the Auto Fulfill field must be set to Yes.

Editing Product: Alumni donation	
Product Type:	Donation
Product Name: (200 chars max)	Alumni donation
Short Description: (500 chars max)	jkj
Long Description: (30,000 chars max)	k
Prompt for Donation Amount:	Donation Amount
Price:	N/A
Recurring Payments:	View Setup
Shipping Class: (determines shipping charge)	none

Field descriptions:

- **Prompt for Donation Amount**—Shoppers see the product name when browsing in the site. It also appears in order and billing confirmations, store financial reports, and fulfillment event records.

- **Recurring Payments**—By clicking the View Setup link , you can set up a donation product to accept recurring payments from customers. You determine whether recurring payments are required with donations. You determine the wording of the prompt that asks customers if they would like to set up a payment plan. You determine the maximum duration of payment plans. And you determine the accepted frequencies of payments (weekly, monthly, quarterly, etc.). For more information about the recurring payments fields, see "Donations and Recurring Payments" on page 144.

The Recurring Payments fields appear on a separate page from the Product Details.

Moving a Product to a Different Store Category

To move a product from one category to another:

1 Open the Product Management page.

2 Use the Jump to Category dropdown to navigate to the category containing the product.

3 Mark the Select checkbox for the product you want to move.

4 Use the Move Selected To dropdown list to choose the new category for the product. All the store's categories appear in the Move Selected To dropdown list.

5 Click the Move Selected To button.

By default, at least two choices are available in the Move Selected To dropdown list: 1) Not Shown to Buyer and 2) Store Home Page. If any store categories have been established, these additional categories will also be available in the dropdown list. Use the Not Shown to Buyer selection to remove a product from a store category and thus suppress its display (however, the product will still be available by way of direct URL link). Use the Store Home Page selection in combination with the default Store Home Page Layout (as described in Section 5.2, "Store Settings" on page 83) to display products directly on the store's home page.

Enabling and Disabling Products

To enable or disable a product, take the following action:

1 Open the Product Management page.

2 Use the Jump to Category dropdown to navigate to the category containing the product.

3 The Status column indicates whether the products in the current store category are enabled or disabled. To disable a product, click the Enabled text link. To enable a product, click the Disabled text link.

4 A dialog appears that asks you to confirm enabling or disabling the product. Click the Yes button.

Products that have been enabled are displayed to shoppers in the category to which they belong. Products that have been disabled are not displayed to shoppers in the category to which they belong; however, the products have not been deleted and are still listed on the Product Management page as belonging to their category. If a shopper somehow reaches the product page for a disabled product (for example, by an outdated link or a saved favorite), the product cannot be added to a shopping cart.

Changing the Product Listing Order

By default, products within categories are shown in alphabetic order to the shopper. You can enter a specific order for any list of products in a category.

To change the listing order:

1 Open the Product Management page.

2 Use the Jump to Category dropdown to navigate to the category containing the product.

3 In the Sort Key column, enter a two-digit "sort key" value for each product.

Note: For numbers 1 through 9, use a leading zero (01, 02, 03, and so on). This ensures the listing order will be correct.

4 Click the Save Changes button.

Note: If you leave some sort key fields empty, Marketplace will show the sorted products first, followed by the rest of the products in alphabetic order.

Deleting a Product

You can permanently remove products; however, be careful when deleting a product because it cannot be restored. To delete a product:

1 Open the Product Management page.

2 Use the Jump to Category dropdown to navigate to the category containing the product.

3 The Action column contains a Delete link for each product. To delete a product, click its Delete link.

4 A dialog appears in which you must confirm deletion of the product. Click the Yes button.

6.4　Using Product Modifiers

A "modifier" is a custom ordering option for a product, such as monogramming. It doesn't change the stock number of the product, but it might change the price.

Modifiers aren't part of the basic product setup. After you add a product to your store, you can then add a modifier to the product. The following types of modifiers are available:

- **Required Selection**—To add the product to their shopping cart, the shopper must select from two or more options. For example, if a shopper is purchasing a baseball cap, they might be given the option of adding a simple campus logo, a more elaborate campus logo, or no logo.

- **Optional Text Entry**—The shopper can choose to customize a product with text. For example, the shopper might be able to add a monogram to a pen set or a shirt.

- **Optional Multiple Select Checkboxes**—The shopper can choose from two or more options that will customize the product. For example, the shopper might be able to add ingredients to a pizza by selecting these checkboxes.

- **Required Text Entry**—The shopper is required to make a text entry before the product can be added to their shopping cart. For example, the shopper might need to enter their student ID number when signing up for a seminar.

Adding a Product Modifier

Follow these steps to add a product modifier.

1 From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > Products. The Store Product Management screen appears.

2 Select the product's category from the Jump to Category dropdown menu. The Store Product Management screen is refreshed with the products from the selected category.

3 Click the product name link. The Store Product Details screen appears.

4 Scroll to the bottom of the screen and click the Add New Modifier link. The Add Product Modifier screen appears.

Campus Wear Add Product Modifier

Modifiers are questions that can be added to collect information about the product. A modifier does not change the product's inventory, but can alter the product price.

[Back To Product Detail]

Modifier Types

Required Selection	Example
Optional Text Entry	Example
Optional Multiple Select Checkboxes	Example
Required Text Entry	Example

---

5 The modifier types appear as text links. Click the type of modifier that you want to add. The Add Product Modifier page appears for the modifier type that you selected.

6 Enter the modifier information and price adjustment(s). Then click the Add Modifier button. (See "Using the Add/Edit Product Modifier Pages" below for details on completing the page.)

Using the Add/Edit Product Modifier Pages

Four types of product modifier pages are available: 1) required selection, 2) optional text entry, 3) optional multiple select checkboxes, and 4) required text entry. When you add a product modifier, you select a modifier type (as described in "Adding a Product Modifier" above) and then complete the fields on the product modifier page.

- **Required Selection Modifier**—You must enter a name for the modifier and its selection values. For example, you might create a modifier with the name of "color" and the selections might be white, yellow, and red. Price adjustments can be entered for each selection: enter only the amount to add to the base product price. Do not enter a total product price.

- **Optional Multiple Selection Checkbox Modifier**—You must enter a name for the modifier and its selection values. For example, you might create a modifier with the name of "extras" (for a seminar being offered by your school). The selections might be 1) box lunch, 2) binder for handouts, 3) mug, and 4) parking pass. Price adjustments can be entered for each selection: enter only the amount to add to the base product price. Do not enter a total product price.

- **Optional Text Entry Modifier**—You must enter a name for the modifier and the maximum number of characters that a shopper can enter in the text entry field. For example, you might create a modifier called "monogram," for which you might set a maximum number of characters at 10. (The maximum allowed by Marketplace is 100.) Price adjustments can be entered for each selection: enter only the amount to add to the base product price. Do not enter a total product price.

Campus Wear Add Product Modifier

Optional Text Entry Modifier allows the buyer to add customized text to the article. For price adjustments, enter only the amount to add to the base product price. Do not enter a total product price.

Back To Product Modifiers

Optional Text Entry Modifier

Name:	
Maximum Number Of Characters That Can Be Entered (Maximum of 100):	
Price Adjustment:	
Hide Modifier In Confirmation e-Mails:	☐ Yes (Check if collecting sensitive information)

Add Modifier

- **Required Text Entry Modifier**—You must enter a name for the modifier and the maximum number of characters that a shopper can enter in the text entry field. For example, you might create a modifier called "attendee name," for which you might set a maximum number of characters at 20. (The maximum allowed by Marketplace is 100.) Price adjustments are relevant in this modifier if the product has articles/variations and you want to apply the modifier to some but not all of the articles/variations. Enter only the amount to add to the base product price. Do not enter a total product price.

Campus Wear Add Product Modifier

Required Text Entry Modifier requires the buyer to enter the requested information. For price adjustments, enter only the amount to add to the base product price. Do not enter a total product price.

Back To Product Modifiers

Required Text Entry Modifier

Name:	
Maximum Number Of Characters That Can Be Entered (Maximum of 100):	
Price Adjustment:	
Hide Modifier In Confirmation e-Mails:	☐ Yes (Check if collecting sensitive information)

Add Modifier

Note: If product options/variations have been established, you will need to specify how the modifiers should be applied. You can choose to apply the modifiers to all the product articles/variations by selecting the "Apply to all articles for this product" checkbox. Or you can apply the modifiers to specific articles/variations: CTRL click all applicable articles/variations displayed in the list box. (By default, all the articles/variations are initially selected. You can de-select and re-select items as necessary.

Note: When a shopper purchases a product, a confirmation message is sent to the shopper. This message displays the modifier value. However, if you are collecting sensitive information with the Optional Text Entry modifier or the Required Text Entry modifier (such as a student ID or a social security number), you should suppress display of the modifier in confirmation email messages. You can suppress display of the modifier by choosing the checkbox labelled Hide Modifier in Confirmation E-mails on the setup page for the modifier.

Editing a Product Modifier

Follow these steps to edit a product modifier. Only merchant managers and store managers can edit product modifiers.

1 From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > Products. The Store Product Management screen appears.

2 Select the product's category from the Jump to Category dropdown menu. The Store Product Management screen is refreshed with the products from the selected category.

3 Click the product name link. The Store Product Details screen appears.

4 Scroll down to the "Modifiers applied to this Product" section. This section lists all the modifiers that have been added to the product.

5 For the product that you need to edit, click the Edit text link in the Other Actions column. The Edit Product Modifier screen appears.

Deleting a Product Modifier

Follow these steps to edit a product modifier. Only merchant managers and store managers can edit product modifiers.

1 From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > Products. The Store Product Management screen appears.

2 Select the product's category from the Jump to Category dropdown menu. The Store Product Management screen is refreshed with the products from the selected category.

3 Click the product name link. The Store Product Details screen appears.

4 Scroll down to the "Modifiers applied to this Product" section. This section lists all the modifiers that have been added to the product.

5 For the product that you need to delete, click the Remove text link in the Other Actions column. The Remove Modifier from Product page appears.

Campus Wear Delete Product Modifier

To select multiple products from the list, press the CTRL key, then click the product names.

Back To Product Management

Removing the Modifier addition from the Product:	Baseball cap w/ Team logo
You can remove this modifier from all articles or from only specific articles	

small
medium
large

Remove From Selected   **Remove From All**

6 You will need to specify how the modifier should be removed. You can choose to remove the modifier from all the articles/variations by selecting the Remove From All button checkbox. Or you can remove the modifiers from selected articles/variations: CTRL click all applicable articles/variations displayed in the list box and then click the Remove From Selected button. (By default, all the articles/ variations are initially selected. You can de-select and re-select items as necessary.)

6.5   Linking to a Product

To link directly to a specific product, you should navigate to the shopping application (uStores) and open the product page that you wish to link to. Copy the URL displayed in your browser's address field.

The URL for a product category uses the following format:

http://[server]/[context]/web/
product_detail.jsp?PRODUCTID=[product ID#]

[server] is the computer where uStores was installed, and [context] is the context path. [product ID#] is the product ID assigned by Marketplace. The product ID value can only be determined by viewing the product page in the shopping application.

Note: If a store is in single-store-only mode and the "Store is Viewable in Mall" option is set to "No" (on the store's General Settings page), you cannot link directly to a store category.

Note: Do not include bracket characters in the URL.

7.0   User Groups and Private Stores

Access to Marketplace stores can be restricted to specified user groups. This functionality can be used to create private stores, in which only specified user groups can view specified stores or make purchases from these stores.

This appendix first describes user groups and private stores and then provides instructions for how to implement this functionality.

7.1   About User Groups and Authentication

User groups are created in Marketplace by an administrator. Marketplace includes two default user groups:

- **Everybody**—All shoppers are part of the "Everybody" group. Stores that use this group do not require shoppers to register or login.

- **Registered Users**—Any shopper who sets up a Marketplace profile automatically becomes part of the "Registered Users" group. Stores that use this group require that shoppers be registered users who are currently logged in.

Most Marketplace installations will only use these two groups.

A Marketplace administrator can add additional user groups for use by private stores in restricting access. The login credentials of the users in these groups must be authenticated against an on-campus system. For example, if students on your campus have a student ID and PIN maintained by your student information system, the Marketplace administrator can create a Marketplace user group called "Students" and an authentication method for the "Students" group. Store managers can subsequently decide that only a certain user group can have access to this store.

7.2   About Private Stores

A "private store" is restricted to one or more user groups. For example, a store might be restricted so that only students or campus staff members could view the store or make purchases. A store manager can designate the user groups that are allowed in this store. A store manager can also decide whether non-members are allowed to view the store but not make purchases.

Shoppers can access private stores in two ways:

- **As Registered Users**—By becoming registered users of Marketplace, shoppers can enter login credentials that allow them to be recognized as user group members. When users log in to Marketplace, they will see any private stores that require membership in the user groups to which they belong.

- **By Using Web Links That Provide User Group Authentication**—A user who has already logged in to a campus application does not have to log into Marketplace to see private stores. A web link from the campus application can identify a user group and provide username and password information. Marketplace, in turn, forwards the login credentials to a campus system for authentication. For example, suppose you have defined a "Students" group in Marketplace. If a student logs into another campus application and clicks the link to Marketplace, the student's username and password (as well as a user group ID) will automatically be forwarded to Marketplace, which then forwards the login credentials to an on-campus system. After the student is authenticated, the student can view and make purchases from any private stores that require membership in the "Students" user group.

7.3 How Shoppers Become Registered Users and Add Group Memberships

By becoming a registered user, a shopper can add user group memberships to their account. A shopper can become a registered user by choosing the Marketplace shopping application's Sign Up link (above the Keyword Search field in the title bar area) and completing the fields on the Create User Account screen (including the username, password, and e-mail address fields).

Once a shopper has become a registered user and signed in to Marketplace, they can add a group membership to their account by navigating to the My Account screen in the Marketplace shopping application (by selecting the View Your Account link) and then selecting My Memberships from the selections available on the My Account screen.

The My Account screen of the Marketplace shopping application.

Registered shoppers can choose to add memberships to their account.

The user groups displayed in the Available Memberships list box represent all the user groups established for your implementation of Marketplace. All Marketplace shoppers will see the same list of available user group memberships.

A registered user can add an available membership to their Marketplace account by selecting the appropriate membership displayed in the Available Memberships list box and clicking the Add button. If the user group requires no authentication, the selected user group name moves to the My Memberships list box. If the user group requires authentication, the Membership Authentication screen appears, which requires the user to enter a username and password for the group.

My Account

Current Address	**Order History**
E-mail & Password	**My Memberships**
Payment Methods	**Shipping Addresses**

Group	Membership Authentication Information
Ron's Group 2	Will return true when used to trying to authenticate.
	Username [ ] Password [ ]

[Authenticate Membership]   [Cancel]

If membership authentication is required for joining a user group, the shopper sees this screen.

After a user is authenticated as a member of a user group, the selected user group name moves to the My Memberships list box. The user can now access any privates stores that require membership in this user group. Subsequently, the user must simply log in as a Marketplace registered user in order to use active memberships for accessing private stores.

7.4   How to Establish a Private Store

Important! Before you begin the process of creating user groups and private stores, you should contact TouchNet Client Services, which can serve in a consulting role to help you define and develop your authentication transaction.

To set up a private store, the following actions must take place:

1   A system administrator creates an XML transaction that will authenticate the users as belonging to the group.

Note: User group setup requires a transaction-based method using TouchNet's Transaction Manager for authenticating login information against data stored in other campus systems. Instructions on how to create an XML-based transaction are outside the scope of this document.

2   A system administrator adds a new transaction to the Transaction Attributes table in TouchNet Payment Gateway.

> **Note:** For schools using TouchNet Cashering, Pay Path, or eBill, a transaction may already exist that can be used for authentication purposes.

3 In the Marketplace Operations Center, a Marketplace administrator defines an authentication method for the new group. (See Section 7.5, "How to Add an Authentication Method" on page 173.)

4 The Marketplace administrator creates a new group for the users who will be allowed in the store. (See Section 7.6, "How to Create a User Group" on page 176.)

5 As part of store setup, the store manager selects which groups are allowed to purchase in the store. The store manager can also decide to let all other shoppers see the store's products but not purchase them. (See "Allowed Groups" on page 102.)

6 The store manager defines what payment methods the allowed groups can use in the store. (See "Group Payment Methods" on page 104.)

After these steps are completed, only the allowed groups will be able to purchase from the private store.

7.5   How to Add an Authentication Method

The Marketplace administrator may need to create a new authentication method for a new group. For example, you may already have a way to authenticate students, but not a method to authenticate faculty and staff. In that case, you would need to create a transaction, then an authentication method to verify faculty and staff users.

These steps assume you have an XML-based transaction available to authenticate group members.

Note: The transaction must be recorded in the transaction attributes table for the Transaction Manager that will pass login credentials to the authenticating system. This must be done before you create the authentication method in Marketplace.

To add a new authentication method:

1 From the Control Menu in the Marketplace Operations Center, navigate to Marketplace Home > System Administration > User Settings > User Authentication. The Marketplace User Authentication screen appears.

2 Click the Add New Authentication Method link. The Add a New Authentication Method page appears.

3 Complete the fields as described below in "Field Definitions," and then click the Save Authentication Method button.

Sample Authentication Method for a Student Group

Field Definitions:

Authentication Method Name and Description

The authentication method name will appear in the list of authentication methods that are available when creating a new group (and as an authentication selection for store payment methods). The description appears in the Edit page for authentication methods. It is your description of how the method is to be used.

Transaction Code

Enter the code (number) for the transaction used to authenticate the group's members. This code should correspond to the number in the transaction attributes table.

TransMgr

Select the name of the Transaction Manager module that will pass the authentication transaction to the host. This is the Transaction Manager where you have recorded transaction attributes details for your transaction.

Instructions to Buyer

These instructions tell the shopper what to enter to log in.

Logon Prompt

This text becomes the label for the logon field. In this field, the shopper enters whatever login ID you require.

Password Prompt

This text becomes the label for the password field used at login.

Request XML Logon Tag Name

Enter the XML tag name used for the logon in your transaction's request XML.

Request XML Password Tag Name

Enter the XML tag name used for the password in your transaction's request XML.

Response XML Output Tag Name

Enter the XML tag name used for the response output that indicates the user is a valid member of the group.

Response XML Output tag Type

Enter the type of tag used for the response output that indicates the user is a valid member of the group.

Note: A Marketplace administrator can change authentication settings later. To edit the settings, navigate to System Administration > User Settings > User Authentication, then click the Edit link next to the authentication method name.

About Authentication for Banner

By establishing a user group for Banner, access to Marketplace stores can be restricted to just those users identified by your Banner system. This functionality can be used to create private stores, in which only users identified by your Banner system can view specified stores or make purchases from these stores.

Important! Before you can establish an authentication method for Banner, you must complete the steps for establishing Banner integration. These steps include editing the *bannerconnect.prp* file, which is described in *Banner Setup for Marketplace 5.0*.

Transaction Code
Enter the following code: **17412**

TransMgr
Make the following selection: **bannerconn**

Request XML Logon Tag Name
Enter the following text: **STUDENT_ID**

Request XML Password Tag Name
Enter the following text: **STUDENT_PIN**

Response XML Output Tag Name
Enter the following text: **PIDM**

Response XML Output tag Type
Make the following selection: **Value**

7.6 How to Create a User Group

Note: Only administrators can create user groups.

To create a user group:

1 From the Control Menu, navigate to Marketplace Home > System Administration > User Settings > User Groups. The uStores User Groups screen appears.

2 Click the Add New Group link. The Add a New uStores Group page appears.

Add a New uStores Group

If you don't need buyers to register as a member of the group, leave the "Display to Buyers" checkbox empty.

Back To User Group Management

Group name:	
Display to Buyer (My Account pages):	☐
Authentication method:	No Authentication ▾

Save

Sample of adding a new student group

3 Enter information for the group:

- **Group name—**Enter a name for the group. Choose a name that both shoppers and store managers will understand.

- **Display to Buyer** (My Account pages)—Choose this checkbox to display the group for registered Marketplace shoppers as an "Available Membership" on the My Account screen of the Marketplace shopping application.

- **Authentication method—**Choose the authentication method used to verify that the shopper is a member of the group.

4 Click the Save New Group button.

Note: A Marketplace administrator can change group settings later. Navigate to System Administration > User Settings > User Groups, then click the Edit link for the group to update.

7.7   How to Link to Marketplace with Group Logins

You can create links from your campus applications so that a user who has already logged in does not have to log into uStores to see private stores.

For example, suppose you have defined a "Students" group in Marketplace. If a student logs into another campus application, and clicks the link to uStores, the student will automatically be able to shop in all stores that require a student group membership for purchases.

Follow these steps to add to your web page a form element that passes login information to uStores:

1 Log into the Marketplace Operations Center with administrator's rights.

2 From the Control Menu, navigate to Marketplace Home > System Administration > User Settings > User Groups. The uStores Groups screen appears.

3 In the list of current groups, locate the group of users who will have logged in through your campus application. Click its Edit link.

4 Note the group ID. You will need to include this group ID in your HTML form element.

5 Log out of the Operations Center.

6 Locate the page in Marketplace you want to link to and note its identifier within the URL:

- To link to the Marketplace home page, the value is index.jsp.

- To link to a store, navigate to that store's home page. The URL will include **store_main.jsp?STOREID=X**, where X is the store's ID.

- To link to a category, navigate to its main page. The URL will include **store_cat.jsp?STOREID=X&CATID=Y**, where X is the store's ID and Y is the category's ID.

7 In your web page, add a form element where you want your link to Marketplace uStores to appear. In the examples that follow, values to change are shown in bold.

- **Server Name**. In the action attribute, you must enter the name of the server where the Marketplace shopping site is installed.

- **GROUP_ID**. Enter the ID value that you noted for the group in Marketplace.

- **Navigate**. Enter the URL string to link to the home page, a store, or a category.

- **Submit.** Choose whether to use input type="submit", along with a button name of your choice, or input type="image", and specify an image file for your application's link to Marketplace. In the example, the button name is shown as "Shop Our Campus Stores."

8 Save your changes and test the link.

Important! You should make sure the link to Marketplace uStores uses https protocol—not http. Otherwise, the login credentials you are submitting via the HTML form will be transmitted as clear text and will not be encrypted.

Form Element Examples

This section shows three sets of form element examples in which user names and passwords are used in combination with a group ID in order to link to a Marketplace store. Replace the values as appropriate for your own store.

Linking to the Marketplace uStores Home Page

Use the first example if you want both the user name and the password passed when linking to the Marketplace mall home page. Follow the second example if you want users to re-enter their passwords.

Example 1

```
<form name="SignInForm" action="https://[server]/ustores/
rsbuyer" method="post">
 <input type="hidden" name="START_APP" value="true">
 <input type="hidden" name="JSP_TYPE" value="web">
 <input type="hidden" name="Navigate" value="index.jsp">
 <input type="hidden" name="OnError"
value="group_login.jsp?GROUP_ID=X">
 <input type="hidden" name="AUTH_EXTERNAL_USER"
value="ActionKey">
 <input type="hidden" name="GROUP_ID" value="Z">
 <input type="hidden" name="USERNAME" value="external
system logon">
 <input type="hidden" name="PASSWORD" value="external
system password">
 <input type="hidden" name="REDIRECT" value="">
 <input type="submit" value="Shop Our Campus Stores">
</form>
```

Example 2

```
<form name="SignInForm" action="https://[server]/ustores/
rsbuyer" method="post">
 <input type="hidden" name="START_APP" value="true">
 <input type="hidden" name="JSP_TYPE" value="web">
 <input type="hidden" name="Navigate" value="index.jsp">
 <input type="hidden" name="OnError"
value="group_login.jsp?GROUP_ID=X">
 <input type="hidden" name="AUTH_EXTERNAL_USER"
value="ActionKey">
 <input type="hidden" name="GROUP_ID" value="Z">
 <input type="hidden" name="USERNAME" value="external
system logon">
 <input type="hidden" name="REDIRECT" value="">
 <input type="submit" value="Shop Our Campus Stores">
</form>
```

Linking to a Store's Home Page

Use the first example if you want both the user name and the password passed when linking directly to a private store. Follow the second example if you want users to re-enter their passwords.

Example 1

```
<form name="SignInForm" action="https://[server]/ustores/
rsbuyer" method="post">
 <input type="hidden" name="START_APP" value="true">
 <input type="hidden" name="JSP_TYPE" value="web">
 <input type="hidden" name="Navigate"
value="store_main.jsp?STOREID=X">
 <input type="hidden" name="OnError"
value="group_login.jsp?GROUP_ID=Z">
 <input type="hidden" name="AUTH_EXTERNAL_USER"
value="ActionKey">
 <input type="hidden" name="GROUP_ID" value="Z">
 <input type="hidden" name="USERNAME" value="external
system logon">
 <input type="hidden" name="PASSWORD" value="external
system password">
 <input type="hidden" name="REDIRECT" value="">
 <input type="submit" value="Shop Our Campus Stores">
</form>
```

Example 2

```
<form name="SignInForm" action="https://[server]/ustores/
rsbuyer" method="post">
 <input type="hidden" name="START_APP" value="true">
 <input type="hidden" name="JSP_TYPE" value="web">
 <input type="hidden" name="Navigate"
value="store_main.jsp?STOREID=X">
 <input type="hidden" name="OnError"
value="group_login.jsp?GROUP_ID=Z">
 <input type="hidden" name="AUTH_EXTERNAL_USER"
value="ActionKey">
 <input type="hidden" name="GROUP_ID" value="Z">
 <input type="hidden" name="USERNAME" value="external
system logon">
 <input type="hidden" name="REDIRECT" value="">
 <input type="submit" value="Shop Our Campus Stores">
</form>
```

Linking to a Store Category Page

Use the first example if you want both the user name and the password passed when linking directly to a category within a private store. Follow the second example if you want users to re-enter their passwords.

Example 1

```
<form name="SignInForm" action="https://[server]/ustores/
rsbuyer" method="post">
 <input type="hidden" name="START_APP" value="true">
 <input type="hidden" name="JSP_TYPE" value="web">
 <input type="hidden" name="Navigate"
value="store_cat.jsp?STOREID=X&CATID=Y">
 <input type="hidden" name="OnError"
value="group_login.jsp?GROUP_ID=Z">
 <input type="hidden" name="AUTH_EXTERNAL_USER"
value="ActionKey">
```

```
                        <input type="hidden" name="GROUP_ID" value="Z">
                        <input type="hidden" name="USERNAME" value="external
                       system logon">
                        <input type="hidden" name="PASSWORD" value="external
                       system password">
                        <input type="hidden" name="REDIRECT" value="">
                        <input type="submit" value="Shop Our Campus Stores">
                       </form>
```

Example 2
```
                       <form name="SignInForm" action="http://[server]/ustores/
                       rsbuyer" method="post">
                        <input type="hidden" name="START_APP" value="true">
                        <input type="hidden" name="JSP_TYPE" value="web">
                        <input type="hidden" name="Navigate"
                       value="store_cat.jsp?STOREID=X&CATID=Y">
                        <input type="hidden" name="OnError"
                       value="group_login.jsp?GROUP_ID=Z">
                        <input type="hidden" name="AUTH_EXTERNAL_USER"
                       value="ActionKey">
                        <input type="hidden" name="GROUP_ID" value="Z">
                        <input type="hidden" name="USERNAME" value="external
                       system logon">
                        <input type="hidden" name="REDIRECT" value="">
                        <input type="submit" value="Shop Our Campus Stores">
                       </form>
```

8.0   The Fulfillment Process

A uStores fulfiller completes order processing by accepting payments, entering fulfillment information, and sending shipment confirmation messages to buyers. Fulfillers with refund and cancel rights can also cancel part or all of a pending order and refund payment for an order.

When you fulfill an order, the buyer receives an e-mail message stating that items have been shipped. If the order was paid by credit card, the e-mail message also confirms the credit card charges.

The fulfiller and the store manager must determine policies for the timing of actual shipments or deliveries with the online fulfillment process. In general, orders should not be fulfilled until the ordered products can be shipped to the customer.

8.1   About Payment Types and Fulfillment

The fulfillment process is affected by the payment type that the customer selected when submitting the transaction.

About Credit Card Payments and Fulfillment

When a fulfiller accepts payment on a credit card purchase, the buyer's credit card is charged. Charges for shipping and tax are included in this payment.

Important! The buyer's credit card is not charged until the order is fulfilled.

About ACH Payments and Fulfillment

ACH payments are processed through Payment Gateway as soon as the shopper purchases the product. However, Marketplace waits a number of days before allowing fulfillment in case Payment Gateway returns notice that the ACH payment was rejected by the bank. If the specified number of days has passed and no rejection notification from Payment Gateway has been received, then the order can be successfully fulfilled. If the waiting period has not passed, you can process the order only if you are a fulfiller with refund/cancel Rights.

The merchant manager sets a default waiting period at the merchant level. The store manager may override the merchant-level waiting period by

entering different waiting periods for individual products. (See "Editing Products" on page 154.)

8.2 Fulfilling Orders

The Marketplace fulfillment process allows you to fulfill multiple orders at the same time (sometimes called batch fulfillment). To fulfill one or more orders, follow these steps:

1 Navigate to Marketplace Home > Store > [store name] > Fulfill Orders. The pending orders list opens.

2 Locate the orders to fulfill.

Note: You can refine the orders displayed in the pending orders list. Search by year, by year and month, or by year, month, and day, or you can enter an order number. Click Go to refresh the report.

3 Select the corresponding checkbox for each order that you would like to fulfill.

Note: Orders that are still subject to the waiting period for ACH payments are indicated by a red X. If the waiting period has not passed, you can process the order only if you are a fulfiller with refund/cancel Rights.

Important! We strongly recommend that you do not attempt to fulfill more than 20 orders at a time. The process of fulfilling large numbers of orders can take several minutes to complete. If the browser timeout limit is reached, the fulfillment page will not update properly.

---

4 Click the Process Fulfillment button. The Accept Payment page opens.

5 Review the displayed order information.

6 Click the Accept Payment button to verify the charges. If you notice any incorrect order information on the Accept Payment page, see "Cancelling an Order or Changing Order Quantity" on page 185.

Note: If you see error messages after clicking the Accept Payment button, see "Looking Up Error Codes" on page 190. If you see error messages related to General Ledger data transfer, this does not mean the fulfillment has failed. It only means the general ledger was not yet updated successfully. Continue processing the fulfillment.

Important! Once you leave the Accept Payment screen during fulfillment, be sure you complete all the remaining steps because you cannot return to these steps later. Do not skip steps unless you are sure they do not apply to the order.

---

7 Click the Print Packing List button, which launches a new browser window that contains packing lists for all the orders that you are fulfilling. When you send the document to your printer, each packing list will print on a separate page.

8 Close the packing list window, and then click the Proceed to Step 3 button.

9 Click the Send Email button to send a shipment confirmation to each customer. For donations, you will have the option to skip sending an e-mail message (because the message "Your order has been processed" may confuse the user).

Important! If you receive an error code during the filfillment process, see Section 8.8, "Looking Up Error Codes" on page 190

8.3   Cancelling an Order or Changing Order Quantity

To cancel an order, or to change the quantity of an item ordered, the fulfiller must initiate the fulfillment process, as described in steps 1 through 3 of "Fulfilling Orders" on page 184. Once the fulfillment process has been initiated for a specific order, a fulfiller with refund/cancel rights can change the quantity of items ordered, with the following limitations:

- The order quantity of a given item can only be reduced; it cannot be increased.

- The order quantity cannot be changed for orders processed with ACH payments if the ACHwait days have not yet expired.

To cancel an order or to change the order quantity, follow these steps:

1 Navigate to Marketplace Home > Store > [store name] > Fulfill Orders. The Fulfillment List page opens.

Note: The list of orders displayed on the Fulfillment List page can be modified by using the fields at the top of the page. You can show orders "pending for" a specified time period (year, month, or day). You can show orders that were "ordered in" a specified time period. And you can show orders that were "fulfilled in" a specified time period. In addition, you can search for a specific order by entering an order number.

2   Select the corresponding checkbox for each order that you would like to cancel or change.

3   Click the Process Fulfillment button. The Accept Payment page opens.

4   To change the quantity ordered, use the New Quantity dropdown list to select a new order quantity. You can only reduce the quantity ordered. You cannot increase the quantity. To cancel an entire order of an item, change its quantity to zero.

Note: The New Quantity dropdown list does not appear for orders processed with ACHpayments until the ACHwait days have expired.

5   Click the Update Items button. The updated amounts are now reflected. If you reduce the quantity to zero, the product is removed from the order.

6   For any additional items that must be removed from the displayed orders, repeat steps 4 and 5 .

Note: If you remove all items from a order, a cancel-order e-mail message is automatically generated and sent to the customer.

7   If the displayed orders still contain purchase items, you can continue processing the orders by clicking the Accept Payment button.

Important! To cancel the order of an individual item, the fulfiller must change the quantity ordered to zero.

If multiple items have been ordered and the entire order needs to be cancelled, the fulfiller must change the order quantity to zero for each order item.

If multiple items have been ordered and some items must be cancelled while others must *not* be cancelled, the fulfiller must change the order quantity to zero for each item that must be removed from the order while leaving the other items in the order (by not changing their order amount to zero). As the fulfiller precedes through the fulfillment process, the cancelled items will be removed from the order. If items remain in the order, the fulfiller can continue with the fulfillment process.

Note: When you change the quantity ordered to zero for all items in an order, the buyer will be automatically notified via e-mail that their order has been canceled. If you change the order quantity to any value other than zero, the buyer will not be automatically notified that their order quantify was changed. However, the buyer will see the updated order quantity when they receive the fulfillment e-mail message. If your policies require that you notify the buyer when the order quantity is changed to a value other than zero, you must send this communication manually. The Buyer Info section of the Order Fulfillment page includes the buyer's e-mail address.

8.4　Working with Backordered Items

The store manager or store clerk may flag some items as "backorderable." In this case, shoppers can buy the product even when the online quantity available is zero.

In general, you should not fulfill an online order until you are able to ship the actual item. If you have cancel rights, you can also communicate with the buyer about changing the quantity ordered so that the remainder of the order can be shipped more quickly.

Communicate products' backorder status and unavailable inventory to the store manager.

8.5　Processing Refunds

A fulfiller with refund/cancel rights can process refunds for completed orders, crediting credit card purchases back to the buyer's credit card and ACH purchases back to the buyer's bank account. The fulfiller can decide how much to refund to the customer, up to the amount of the original purchase. Shipping costs can also be refunded .

As well as refunding a dollar amount to the customer, Marketplace's refund functionality can be used to update the quantity of items being returned. Updating the quantity field is especially important for products in which the stock quantity is being tracked. A dollar amount can be refunded either with or without updating the item quantity. Likewise, the item quantity can be updated either with or without refunding a dollar amount.

After refunds are processed, Marketplace will automatically generate and send an e-mail message to the customer. This e-mail message details the credited amount and/or the quantity of items returned.

Note: Only a fulfiller with refund/cancel rights can process refunds.

Using the Fulfillment List Page

The Fulfillment List page appears when a user with fulfiller rights selects a store's Fulfill Orders link in the left navigation menu. The Fulfillment List page initially shows all the orders awaiting fulfillment for a specific store. To display orders that have already been fulfilled—and thus can be refunded—you will need to modify the list of orders displayed on the Fulfillment List page.

A fulfiller can modify the list of orders displayed on the Fulfillment List page in the following ways:

- by entering a date range,

- by selecting the type of orders to display (pending, ordered, or fulfilled) with the Show Orders dropdown list, and

- by searching for a specific order by entering an order number in the Search by Order # field.

Note: The Show Orders dropdown list provides three choices: 1) pending for, 2) ordered on, and 3) fulfilled on. "Pending for" orders have not yet been fulfilled and cannot be refunded. "Ordered on" orders may include orders that were fulfilled as well as orders that have not yet fulfilled. "Fulfilled on" orders include only orders that have been fulfilled.

Once you locate an order to be refunded, you can initiate the refund process by selecting the order's View Details button. Only orders that have already been fulfilled have a View Details button.

Using the Fulfillment Details Page

The Fulfillment Details page provides information about a specified order that was fulfilled and includes functionality that allows a fulfiller with cancel/refund rights to issue a refund.

On the Fulfillment Details page, each item in the fulfilled order appears on a separate line. On each item line, two fields pertain to refunds: 1) Refundable Amt and 2) New Quantity to Return. In addition, if shipping charges apply, the shipping amount appears in the Refundable Shipping Amt field.

For a fulfiller to process a dollar amount refund for the item purchased, a dollar amount greater than zero must appear in the Refundable Amt field. Likewise, for a fulfiller to process a dollar amount refund for shipping, a dollar amount greater than zero must appear in the Refundable Shipping Amt field.

The fulfiller can decide how much to refund to the customer for each item in the order, up to the amount listed in the Refundable Amt field. For shipping refunds, the fulfiller can decide how much to refund for the order, up to the amount in the Refundable Shipping Amt field.

The fulfiller enters the dollar amount in the Refund Amt field for each separate item in the order. In addition, the fulfiller can enter a dollar amount for shipping in the Refund Amt field in the shipping section of the order.

As well as refunding a dollar amount to the customer, Marketplace's refund functionality can be used to update the quantity of items being returned. Updating the quantity field is especially important for products in which the stock quantity is being tracked. A dollar amount can be refunded either with or without updating the item quantity. Likewise, the item quantity can be updated either with or without refunding a dollar amount.

Note: Only a fulfiller with refund/cancel rights can process refunds.

8.6   Processing Refunds

A fulfiller with refund/cancel rights can process refunds for completed orders, crediting credit card purchases back to the buyer's credit card and ACH purchases back to the buyer's bank account. The fulfiller processes a refund by using the following steps:

1   Navigate to Marketplace Home > Store > [store name] > Fulfill Orders. The Fulfillment List page appears.

2   Select Fulfilled On or Ordered On from the Show Orders dropdown list, and then a date range to search. Click Go. The Fulfillment List page is updated to display the orders that meet the criteria that you entered.

   Note: If you know the specific order number to refund, you can select Fulfilled Orders, enter the order number, and click Go.

3   Locate the order and click its View Details button. The Fulfillment Details page appears.

4   Determine the dollar amount to be refunded for each item in the order and enter these dollar amounts in the corresponding Refund Amt fields. If a dollar amount refund is possible for an item in an order, you will see an amount greater than zero in the Refundable Amt field for the corresponding item. You cannot enter a dollar amount greater than the value displayed in the Refundable Amt field.

5   (If applicable) For each item in the order, select the quantity of items to place back in store inventory from the New Quantity To Return dropdown list.

> **Note:** Updating the item quantity is only relevant if the store tracks the inventory of the purchased item. A dollar amount can be refunded either with or without updating the item quantity. Likewise, the item quantity can be updated either with or without refunding a dollar amount.

6 (If applicable) Enter a shipping amount to refund in the Refund Amt field. If a dollar amount shipping refund is possible for an order, you will see an amount greater than zero in the Refundable Shipping Amt field. You cannot refund a dollar amount greater than the value displayed in the Refundable Amt field.

7 Click the Process Refund button.

8.7 Receiving an E-Mail Message When an Order is Submitted

If you are a merchant manager, store Manager, store clerk, or fulfiller, you may edit your profile and choose to have an e-mail sent to you whenever a purchase is made from your store. This is useful when your store has a low volume and you don't want to log in to the Operations Center to see if new orders have been placed.

Use these steps to edit your profile for receiving an e-mail message when an order is submitted:

1 Choose Edit My Profile for the control menu. The Edit Profile screen appears.

2 For each store from which you would like to receive a notification e-mail message, select the checkbox beside the corresponding store name.

3 Choose the Update Notification Settings button.

8.8 Looking Up Error Codes

If you receive an error code during the fulfillment process, you should use the list of error codes maintained on the TouchNet Client Services web site to determine the cause of the error code and view troubleshooting information. Use the following instructions to login to the Client Services web site and look up the error code:

1   Go to the TouchNet Client Services web site at http://www.touchnet.com/ clientservices/.

2   Login to TouchNet Client Services.

   If you have never been assigned a login by TouchNet, click Don't Have a Login? and fill out the Login Request.

   If you don't remember your login information, click Forgot Your Login? and fill out the Login Request.

3   Click the FAQ/Error Codes link.

4   Choose Payment Gateway from the Product dropdown list.

5   Double-click Common Error Codes to view the list.

6   Click on an error code to view its description in the Description tab.

   Click the Resolution tab to view troubleshooting information.

   Click the Attach tab to open or extract a PDF file about the error code.

8.9   About Credit Card Auto Authorization

A Marketplace merchant (and all the stores under that merchant) can be set to use Marketplace's auto authorization functionality. This functionality if available on the Add Marketplace Merchant page, as well as the Marketplace Merchant Settings page (as the Automatically Authorize Shipment Payments option). When this option is selected and a customer chooses to use a credit card for payment, the customer's credit card is encumbered at the time an order is submitted. If the credit card information is invalid or insufficient funds are available, the customer is immediately notified during the checkout process. The customer can then edit the order's payment information.

When you fulfill an order that uses auto authorization, the resulting actions taken by Marketplace (and Payment Gateway) depend on the number of days that have passed. If the number of days is less than or equal to the value entered in the Re-Authorization Days field, then the order only goes through settlement. (Credit card settlement is the process by which authorized transactions are submitted to card issuers for payment.) If the number of days is greater than the value in the Re-Authorization Days field, then the order is both re-authorized (again encumbering the customer's credit card) and settled.

The value entered in the Re-Authorization Days field should represent the number of days that the merchant's credit card processor will allow a credit card to be encumbered.

9.0   Automatic E-mail Messages

When customers submit an order, they receive an e-mail message that confirms the store received the order. Likewise, when an order is fulfilled, the customer receives an e-mail message that indicates the customer's credit card or bank account has been billed and the items have been shipped. Another type of message is sent when the customer cancels an order. The announcement section of these three message types can be customized as described in "Editing E-mail Messages" on page 195.

In addition to editing the messages described above, confirmation messages for recurring payments can be customized.

9.1   Examples of E-mail Messages

Here is an example of an order confirmation e-mail message:

```
Thank you for shopping at Marketplace.

[The order confirmation announcement appears here.]

----- ORDER #21534 -----

Store: CampusWear (for questions, comments, or order
status, send e-mail to campuswear@touchnet.com)

Shipping Address:
John Smith
15522 College Blvd.
Shawnee KS
66226
USA

Payment Method:
Payment Type: MasterCard
Account Number: xxxxxxxxxxxx5454

----------------------
Items You Have Ordered:
Item: sweatshirt
Stock #: 777 Price : $25.00 Quantity: 1
Delivery Method: US Mail

Subtotal $ 25.00
Shipping $ 3.00
Total w/shipping $ 28.00
Tax $ 0.00
```

```
Grand Total $ 28.00
```

Here is an example of a fulfillment e-mail message:

```
RE: Order #21534 from CampusWear
```

[The fulfillment announcement appears here.]

```
For items in this shipment only, your credit card has been
billed for a total of
$28.00 Your shipment consists of the following items:

Item: sweatshirt
Stock #: 777 Quantity: 1

These items have been shipped by the following method: US
Mail Other items you ordered, if any, will be shipped
separately.
If you have any questions or problems, please send e-mail
to mailto:campuswear@touchnet.com and refer to Order #21534

Thank you for shopping with us!
```

And here is an example of a cancel-order e-mail message:

```
Thank you for shopping at CampusWear.
```

[The cancel order announcement appears here.]

```
----- ORDER #7343 -----

Store: CampusWear (for questions, comments, or order
status, send e-mail to campuswear@touchnet.com)

Shipping Address:
John Smith
15522 College Blvd.
Shawnee KS
66226
USA


----------------------

Items that have been cancelled:

 Item: sweatshirt
Stock #: 2358342 Price: $25.00 Quantity: 1
Delivery Method: US Mail
```

And here is an example of a recurring payment message:

```
Hello,

This is an automated message to inform you that your
scheduled payment has been completed successfully. Payment
details are listed below. Please note that all payments are
subject to approval and final verification.

======== PAYMENT DETAILS ========
Customer Name --- John Doe
Payment Date --- 2008-12-30 01:20:08
Amount --- $330.00
Payment Method --- MasterCard
Payment Gateway Reference Number --- 53565635656
System Tracking ID --- 1113
=================================

Sincerely,
University Billing Department
```

9.2   Editing E-mail Messages

You can add an announcement to three types of store e-mail messages: order confirmations, fulfillment confirmations, and cancellation/refund confirmations. The announcement appears at the top of each of these message types. The remainder of the messages contain transaction information and cannot be edited.

You likely already entered text for the E-mail Order Announcement, the E-mail Fulfillment Announcement, and the E-mail Cancel Order Announcement when you established your store. However, you can edit text used in these e-mail messages by using the following instructions:

1 From the Control Menu, navigate to Marketplace Home > [merchant] > Store > [store] > Store Settings > General. The General Settings screen appears.

Campus Wear General Settings

Settings on this page change your store display and global options that will apply to products.

Store is currently ONLINE.

| Take Store Offline | Delete Store |

Store Id :	23
Store Name:	Campus Wear
Store Display Name:	Campus Wear
Return Policy: (5,000 chars max)	
Special Announcement: (5,000 chars max)	
Email Fulfillment Announcement: (5,000 chars max)	
Email Order Announcement: (5,000 chars max)	
Email Cancel Order Announcement: (5,000 chars max)	
Store Home Page Layout:	Splash (Top Level Categories and Splash Image)
Total Digital File Space Used By Store (bytes):	0
Total Size Available for Digital Files (bytes):	200,000,000
Allow Partial Refunds:	○ Yes ● No
Allow The Refunding Of Shipping:	○ Yes ● No
Allow Recurring Payments On Products:	○ Yes ● No

2   The text that you enter in the Email Order Announcement field will appear near the top of order confirmation e-mail messages. This text can serve as a short message from your store to the customer. All customers receive the same Email Order Announcement in their order confirmation e-mail message. The order details appear after the Email Order Announcement text. For an example of the order confirmation e-mail message, see "Examples of E-mail Messages" on page 193

3   The text that you enter in the Email Fulfillment Announcement field will appear near the top of fulfillment e-mail messages. Theses message are sent to customers after their orders have been fulfilled. The Email Fulfillment Announcement can serve as a short message from your store to the customer. All customers receive this same

announcement in their fulfillment e-mail message. The order details appear after the Email Fulfillment Announcement text. For an example of the fulfillment e-mail message, see "Examples of E-mail Messages" on page 193

4   The text that you enter in the Email Cancel Order Announcement field will appear near the top of cancel-order e-mail messages. Theses message are sent to customers after items in their orders have been canceled during the fulfillment process or after a refund has been processed. The Email Cancel Order Announcement can serve as a short message from your store to the customer. All customers receive this same announcement in cancellation e-mail messages. The order details appear after the Email Cancel Order Announcement text. For an example of the cancellation e-mail message, see "Examples of E-mail Messages" on page 193

5   Click the Save Changes button.

Editing Recurring Payment E-mail Messages

In addition to editing the three types of e-mail messages described above, you can also edit the recurring payment e-mail messages. However, these messages can only be changed by directly editing the template files. These files can be found in the following location: *\touchnet\marketplace50\sys\tmsrecur*. Look for the following three files:

- *success_template.txt*—This file is used when all d

- *failure_template.txt*—

- *error_notification_template.txt*—

Note: If these files need to be edited, you should contact your Marketplace administrator. These files cannot be edited with Marketplace Operations Center.

Here is an example of the *success_template.txt* file.

```
Hello,


This is an automated message to inform you that your
scheduled payment has been completed successfully. Payment
details are listed below. Please note that all payments are
subject to approval and final verification.

======== PAYMENT DETAILS ========
Customer Name --- {{/TOUCHNET/PAYMENT_METHOD/
ADDRESS[@TYPE='billing']/NAME}}
Payment Date --- {{__DATE__}}
Amount --- {{__AMOUNT__}}
```

```
Payment Method --- {{/TOUCHNET/PAYMENT_METHOD/
HSA_PMT_METH_NAME}}
Payment Gateway Reference Number ---
{{__REFERENCE_NUMBER__}}
System Tracking ID --- {{__ORDER_ID__}}
=================================

Sincerely,
University Billing Department
```

You can edit any character in the template except for the value declarations in double curly brackets {{ }}. In a similar fashion, you can also edit the *failure_template.txt* and *error_notification.txt*.

Important! Be sure not to edit the value declarations in double curly brackets or you may disable e-mail messages for recurring payments.

9.3   uStores E-mail Addresses

The e-mail addresses that will used as the "from" addresses for Marketplace uStores e-mail messages depend on the types of e-mail messages being generated. The following table describes each type of Marketplace uStores e-mail message and defines which e-mail addresses are used.

This message type ...	Uses this e-mail address in the "from" field
Order confirmation	The e-mail address of the Store Contact.
Fulfillment confirmation	Be sure that the user that you name as the store contact has an e-mail address that is appropriate for use with the store. If no store contact is named, or if the store contact has not entered an e-mail address as part of their user profile, then the "Default contact e-mail address for the site" (as named on the General System Settings page) will be used. Likewise, if no store contact is named *and* no default contact e-mail address is named for uStores, then the e-mail address named in the *critical.prp* file will be used. (The e-mail address in the *critical.prp* file was named when Marketplace was set up. If this address must be changed, you should contact your Marketplace administrator.)
Cancellation/Refund confirmation	
Store "Send us e-mail" link	

This message type ...	Uses this e-mail address in the "from" field
Recurring payment confirmation	The e-mail address named in the AliveCheck.mail.from field of the *tmsrecur.prp* file.

About the Store Contact

The user assigned as store contact is important because the e-mail address that this user enters in their user profile will be the e-mail address used for most of the e-mail messages generated for your store. For this reason, you should be sure when you name a store contact that they have associated an appropriate e-mail address with their user profile. Ideally, this address will be a stable e-mail address that will not change over time. You should consider setting up a store contact user strictly for the purpose of receiving e-mail messages of a customer support nature.

For more information on setting store roles, see "Changing Store User Roles" on page 69.

About Recurring Payments Announcements

All recurring payment confirmations for all Marketplace merchants—for both uStores and uPay—use the same "from" e-mail address. This e-mail address can be configured with the AliveCheck.mail.from field in the *tmsrecur.prp* file.

Part 4:

Building and Managing uPay Sites

10.0 What is uPay?

The uPay features of Marketplace allow you to configure online payment pages that you can connect to your existing campus web applications. You customize your uPay sites for handling specific transactions. For instance, you might have one uPay site take alumni donations and another take payments for conference registrations.

Whereas Marketplace's uStores functionality allows you to create stores and product pages (and provides shopping cart and checkout functionality), Marketplace's uPay functionality focuses only on the payment pages. You build the product pages in your campus application external to uPay. The web application then calls the uPay site when it's time for a payment to be accepted. uPay allows you to make site layout choices and upload images so that a consistent look and feel can be maintained with your campus application.

In this section, we provide an overview of how a uPay site can be established and discuss what uPay users see when making payments. This section also describes the elements that can be customized on each uPay page. (Because uPay sites are highly customizable, your uPay pages will be similar but not identical to our examples.)

10.1 An Overview of uPay

uPay is designed to be integrated with a campus web application. This campus web application can take make many forms. It can be a single-product web site (e.g., for selling parking passes). It can be a store with multiple products (e.g., for selling athletic clothing). It can be an alumni group that accepts donations. In fact, the uses to which uPay can be applied are only limited by your imagination.

The campus web application totals the customer's purchase—including any applicable taxes, shipping charges, and other fees—and forwards this total dollar amount to uPay. For donations, the campus web application does not necessarily pass a dollar amount to a uPay site. The customer might set the dollar amount once they reach the uPay site. For both products and donations, uPay processes the customer's total payment.

For uPay to integrate with a campus web application, the campus web application must be able to pass parameters that describe the transaction. At a minimum, the campus web application must pass a uPay site ID that identifies which uPay site will handle the transaction. In addition, in order for a transaction to be identified and tracked, the campus web application must pass a transaction ID (called EXT_TRANS_ID by uPay), and this ID can be used by the campus organization to identify the order (or the donation).

The customer then chooses a payment method and enters payment information, such as a credit card number and an expiration date (or a bank routing number and a bank account number). After the payment is processed by uPay (and Payment Gateway), uPay can pass information about the transaction back to the campus web application.

The campus web application can store a great deal of information about the customer and the transaction, including product IDs, customer name, mailing address, e-mail address, etc. This information can be passed to uPay, which in turn can forward this information back to the campus web application after the transaction is processed.

For example, a campus web application could allow a student to enter information that initiates a transaction, such as requesting a parking pass or reserving a spot in a seminar. The campus web application might store the student's name, student ID, e-mail address, and mailing address. This transaction would be marked with a pending status in the web application. Meanwhile, the web application would pass parameters to uPay that identify and describe the transaction. The uPay site would accept the customer's payment and pass information about the transaction back to the campus web application by way of a posting URL.

The posting URL points at the campus web application that initiated the transaction. When a posting URL is used, uPay posts parameters regarding the transaction back to the campus web application, allowing the application to change its record of the payment status to completed or cancelled.

Note: Campus web applications do not necessarily need to pass a transaction ID to uPay; however, without a transaction ID the campus organization will have no way to match payment information with customer information. In effect, the campus organization would be accepting payments blindly, which might be acceptable for donations; however, even with donations, the campus organization would almost certainly want to track information about the donor beyond the payment fields required for monetary transactions in uPay.

10.2   Planning Ahead for uPay

Before you start using Marketplace to build your uPay site, you should first consider the various payment settings, as well as the customizable page text and text links. You should consider the available page layout options and have prepared images that can be used for the header and (if necessary) banner, as well as the continue and cancel buttons.

Marketplace provides you with a wide range of settings so that you can customize your uPay site to best meet the needs of your school or campus

organization. This section provides an overview of the available payment settings and the site customization options.

Payment Options

Marketplace provides you with a wide array of options for determining how your uPay site will handle payments. The following table summarizes the available payment options.

Types of Payment Options	Payment Options
Single payment options	You set the default payment amounts, as well as minimums and maximums.
	You choose the accepted payment methods.
	You determine whether a dollar amount can be passed from a campus web application to your uPay site.
	You determine whether the customer can edit the dollar amount after it has been passed from a campus web application to your uPay site.
	You determine if a VALIDATION_KEY value is used in conjunction with a posting key for dollar values passed to your uPay site from a campus web application (increasing security).
	You determine if address verification is required for credit card purchases.
	You determine whether the credit card verification value is required.
	You determine whether the customer must enter their bank account number twice for ACH transactions.
	You determine whether the customer must enter their address for ACH transactions.
	You determine the URL that is targeted if the customer clicks the uPay cancel button.
Recurring payment options	You determine whether recurring payments are allowed.
	You determine if a maximum duration (time period) is set for completing recurring payments.
	You determine the accepted frequencies (weekly, monthly, quarterly, etc.) for recurring payments.

Types of Payment Options	Payment Options
Posting options	You determine whether a posting URL is used so that transaction parameters are passed to your campus web application.
	You determine whether a posting key value is passed to a posting URL (increasing security).
	You determine whether transaction parameters are passed to your campus web application when the customer clicks the uPay Cancel button.
General ledger options	You determine whether to use Marketplace's general ledger features for tracking revenue of your uPay site.
	And once you turn on general ledger functionality, you choose an accounting code for the uPay site.

Site Layout and Graphics

Marketplace provides three layouts for you to choose from. These layouts offer variations in how your uPay site will be displayed to the customer. When you set up a uPay site, you'll be able to select one of the three layouts and upload header and (if applicable) banner graphics, as well as graphics for the Cancel and Continue buttons. Here are descriptions of the layout options.

Note: The Marketplace Operations Center refers to these layout options as 0, 1, and 2. The following descriptions use these same numeric assignments.

layout #0

Layout option #0 includes a header that is left justified. The header image appears at the top of the page, above the payment fields. Our recommended size for the header is 800 pixels wide by 165 pixels high. As indicated in the sample, your header graphic might include the name of your campus organization and school, as well as a logo or a photo.

layout #1

Layout option #1 includes a header that is center justified. The header image appears at the top of the page, above the payment fields, which are centered beneath the header. Our recommended size for the header is 800 pixels wide by 165 pixels high. As indicated in the sample, your header graphic might include the name of your campus organization and school, as well as a logo or a photo.

layout #2

Layout option #2 uses both a header and a banner. The header image appears at the top of the page, above the payment fields. Our recommended

size for the header is 800 pixels wide by 165 pixels high. As indicated in the sample, your header graphic might include the name of your campus organization and school, as well as a logo or a photo. The banner graphic appears below the header and to the left of the payment fields. Our recommended size for the banner is 167 pixels wide by 350 pixels high. Your banner graphic can include images that help make your uPay site look like your campus web application. Both the header and banner are left justified.

For all three layout options, you can upload images for the Cancel and Continue buttons. Our recommended size for these images is 100 pixels wide by 30 pixels high. If your campus web application uses a particular graphic style for its buttons, you can maintain that style by uploading your own customized images to be used as the buttons for your uPay site.

For details about making layout selections, see "Site Name and Layout" on page 221. For details about uploading images, see "uPay Site Images" on page 240.

Messages, Prompts, Titles, and Other Text

Marketplace gives you the ability to customize selected text that appears on the uPay pages, such as the message text that appears at the top of each payment page, the title text that appears in the title bar of the customer's browser, the prompt text that appears beside various form fields, the ACH agreement text for recurring payment plans, and the privacy policy text.

Each page of your uPay site has message text above the entry fields. This text appears in bold face. On most uPay pages, you can customize the contents of the message text. This text describes the purpose of the page and instructs customers how to use the page.

On some pages, prompt text can also be customized, as indicated in the following sample page

a sample page with message and prompt text

In this sample, the Payment Amount Prompt text can be customized, as well as the Recurring Payment Prompt text. In addition, the default ACH Shared Secret Prompt text can be changed. (The Shared Secret Prompt can also be modified with a transaction parameter passed from the campus web application.)

You can also customize the privacy policy text.

a sample privacy policy page

A text link for your privacy policy is included on every page on your uPay site. When clicked this link opens a pop-up window that can display your school's privacy policy. The privacy policy page can either be created with Marketplace or reside on a campus web server external to uPay.

Other editable uPay site text includes your site's ACH agreement. Before ACH transactions can be processed, your customers must indicate they agree to the conditions described in the ACH agreement. You use Marketplace to enter the ACH agreement for each Marketplace merchant.

For details on customizing message text, title text, prompt text, and privacy policy text, see "Using Marketplace to Build a uPay Site" on page 221.

Text Links

And finally, you can customize the contents of some links used by your uPay site. You can customize both the text used for the text links as well as the URLs targeted by the text links. Here are the links you can customize:

Text Link	Description
Privacy policy	A text link for your privacy policy is included on every page on your uPay site. When clicked this link opens a pop-up window that can display your school's privacy policy. The privacy policy page can either be created with Marketplace or reside on a campus web server external to uPay.
Success link	After the customer has submitted their payment, the Receipt page appears uPay sends the customer back to the TouchNet Ready Partner's web application. The success link is positioned at the bottom of this page. You can use this link to give customers a short message that they can click on to navigate away from the uPay site once the transaction is complete. For example, you might use this text link to point the customer back to your campus web application. The success link points at a destination on the web application.
Error link	If a system failure is encountered, you can use the text link on the error page to route the customer to an appropriate destination on the campus web application.
Cancel link	If a customer clicks the uPay cancel button, you can use this link to route the customer to an appropriate destination on the campus web application.

10.3 What uPay Customers See

This section describes each of the uPay site pages that your customers will see and explains which parts of these pages are customizable.

All uPay Pages

The following notes describe the general site features that appear on most uPay pages:

- **Header image**—You can upload a header image. This image will appear at the top of all the uPay site pages.

- **Cancel button image and URL**—You can upload an image to be used for the cancel button. In addition, you can enter the URL that will be used if the customer clicks the cancel button.

- **Continue button image**—You can upload an image to be used for the continue button.

- **Privacy policy URL and link text**—You can enter the URL that will be used if the customer clicks the Privacy Policy link. In addition, you can enter text to be used for the Privacy Policy link.

The Payment Method Selection Page

When the user clicks the payment link in your application, the first uPay payment page displayed for the customer is the Payment Method Selection page:

In the Payment Method Selection page, the user selects a payment method and amount.

For the Payment Method Selection page, you can also customize these features:

- **Message text**—You create the message text that appears above the payment fields.

- **Payment methods**—You choose the payment methods available to users.

- **Payment amount**—You can enter a default payment amount that appears in the payment amount field. You can also define the minimum and maximum payment amounts allowed.

  Note: You can also pass the payment amount to uPay from your application or web site. See "Form Parameters" on page 238.

- **Allow recurring payments**—You can choose whether your site will accept recurring payments. A recurring payment is a payment that is repeated at specified intervals.

The Electronic Banking Information Page

After the user selects "Bank Account" as the payment method, the Electronic Banking Information page opens. This page allows the user to select Checking or Savings as the bank account type and enter the corresponding account information.

In the Electronic Banking Information page, users give bank account information.

For the Electronic Banking Information page, you can also customize these features:

- **Message text**—You create the message text that appears above the bank account fields.

- **Address verification**—If you require address information to be entered, the user will be prompted to fill in street address, city, state, and zip code fields.

  Requiring data does not result in the failure of transactions for incorrect data.

- **Verification account number**—If you require it, the user must enter the bank account number twice. This helps prevent rejected payments errors due to mis-typed account numbers.

The Credit Card Information Page

After the user selects "Credit Card" as the payment method, the Credit Card Information page opens. This page allows the user to select the credit card type and enter the corresponding credit card information.

In the Credit Card Information page, users give credit card account information.

- **Message text**—You create the message text that appears above the credit card fields.

- **Credit Card Type**—When you set up payment methods allowed, you choose specific credit card types to be available to customers. While the Payment Selection page only shows two choices—1) Credit Card and 2) Bank Account—the Credit Card Information page shows all the

credit card type choices (i.e., Visa, MasterCard, American Express, Discover, etc.).

- **Card Verification Value**—You can require customers to enter the card verification value. This number is typically printed (not imprinted) on the credit card, usually above the signature area or above the imprinted number.
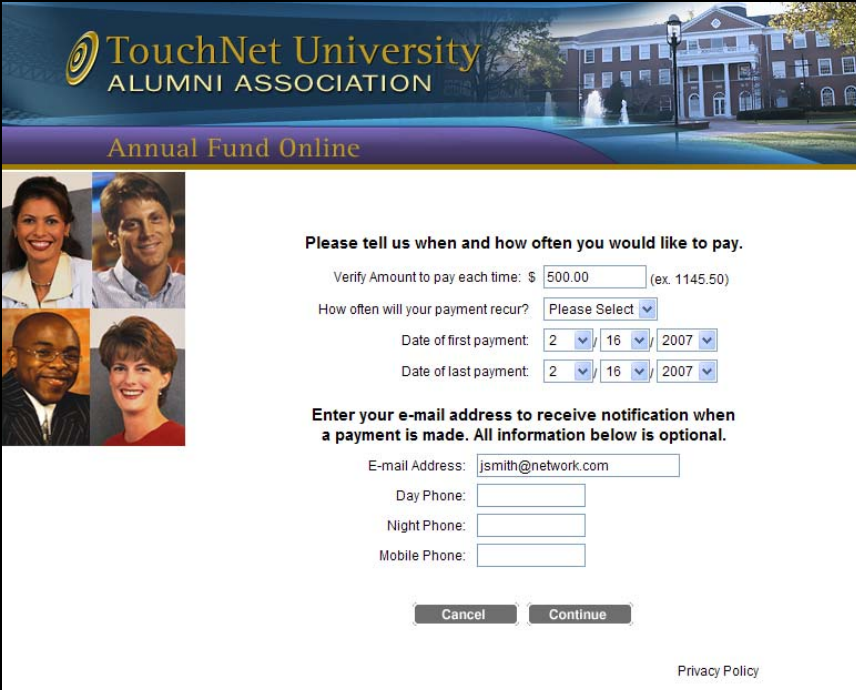
  Depending on how Payment Gateway has been configured, requiring data may result in the failure of transactions with incorrect data.

- **Address verification**—If you require address verification, the user will be prompted to fill in the cardholder's street address, city, state, and zip code fields.

  Note: Depending on how Payment Gateway has been configured, requiring data may result in the failure of transactions with incorrect data.

The Recurring Payments Page

If the user wants to make a recurring payment, then this page appears after the entry of account information.

On the Recurring Payments page, the user confirms the payment amount, selects the frequency for the payments, and enters the beginning and end payment dates.

If the user enters a different amount here from the amount in the first page, then the new amount will be used for all payments.

The user is also prompted for optional contact information. If the user enters the e-mail address, then payments notices will automatically be sent by e-mail to the user. E-mail and other contact information is available to you in the Payment Search report, and you can use it to communicate with the user as needed.

In the Recurring Payments Page, you can set the following option.

- **Accepted frequencies**—You decide what choices appear in the dropdown labeled, "How often will your payment recur?" The full range of choices includes weekly, monthly, quarterly, semi-annually (twice a year), and annually.

The ACH Agreement Page

Users who are paying through a bank account are required to sign an ACH agreement. Your ACH agreement performs two functions. It is your statement of terms and conditions for electronic payments. It is also your stored evidence of payment and the identity of the payer.

The ACH agreement page will appear after recurring payment choices are made. If there is no recurring payment, it will appear after the bank account information is entered.

In the ACH Agreement page, the user reviews and agrees to payment terms.

For the ACH agreement page, you can customize these features:

- **Message text**—You create the message text that appears above the ACH Agreement.

- **The ACH agreement**—The ACH agreement for recurring payments is customized within uPay site setup. However, the ACH agreement for single payments is customized in the merchant settings to ensure that the same agreement is used for all single ACH payments under the same merchant.

- **The shared secret value prompt**—You determine if a shared secret value is required for ACH transactions. A shared secret value is a value that the customer knows, for instance, a birth year or the last four digits of an ID number. While the shared secret value is not required by uPay, it is a requirement of the NACHA rules for web-based ACH payments. Having customers enter a shared secret value increases security of payments through electronic bank accounts.

  You can choose the wording that appears as the shared secret value prompt. This prompt appears to the left of the shared secret value field.

  Note: To use the shared secret value, you must retrieve the value from a campus system and pass it to uPay from your web application. You can also pass a shared secret value prompt, which will override your Operations Center entry. See "Form Parameters" on page 238. If your web application does not pass the shared secret value, then the uPay ACH Agreement page will not ask the customer to enter anything on the page. The customer will only need to click the Continue button. In either case, uPay treats clicking Continue as an agreement to the terms.

The Credit Card Verification Page

The Credit Card Verification page appears after the user enters the credit card information and recurring payment information, if any.

The user verifies credit card information, then clicks Continue.

The message text is customizable on the Credit Card Verification page.

- **Message text**—You create the message text that appears above the credit card information.

The Receipt Page

The Receipt page appears for successful payments, after the user has either signed the ACH agreement or verified credit card information.

The Receipt page is the last step in the uPay process.

For the Receipt page, you can customize these features:

- **Message text**—You create the "thank you" message text that appears above the transaction information.

- **Contact info for recurring payments**—Because these payments continue into the future, the user may need to contact someone about changes to the upcoming payments. You provide the name, phone number, and e-mail address of this contact.

- **Success link**—You customize the text of this link and the URL to go to when the link is clicked.

11.0 Building a uPay Site

In the Marketplace Operations Center, uPay sites are created by users with the merchant manager role. The merchant manager may designate one or more users as uPay site managers for each site. Then, either the merchant manager or the uPay site manager can update the site's features.

In this section, we'll walk you through the process of building a uPay site. Here is an overview of the major steps of uPay site creation:

Activity	Description
Preparation	Prepare for building a uPay site by reviewing merchant settings, reviewing site customization options, and planning campus integration. (See "Planning Ahead for uPay" on page 204 and "What uPay Customers See" on page 210.)
Using Marketplace to build a uPay site	Build your uPay site by using the Add uPay Site option in Marketplace. This wizard leads you through the site setup options. (See Section 11.2, "Using Marketplace to Build a uPay Site" on page 221.)
Linking to your uPay site	Set up your campus web application to pass transaction parameters to your uPay site. (See Section 11.3, "Passing Parameters to Your uPay Site" on page 242.)
Using a VALIDATION_KEY	(Optional.) Set up your campus web application to pass a VALIDATION_KEY transaction parameter. Increases security when dollar amounts are passed to your uPay site. (See Section 11.4, "Using the VALIDATION_KEY Option" on page 247.)
Using a posting URL	Set up your campus web application to accept the transaction parameters that are passed from your uPay site back to you campus web application. (See Section 11.5, "Using a Posting URL" on page 254.)
Bringing your uPay site online	Use Marketplace to make your uPay site active and start receiving payments. (See Section 11.6, "Bringing Your uPay Site Online" on page 261.)

11.1   Before You Build a uPay Site

Before you build a uPay site, you need to consider which merchant the uPay site will be linked to and how this merchant has been configured. You also

need to become familiar with the wealth of customization options available in uPay so that you can make the appropriate selections during site setup. In addition, you will need to plan for integrating the uPay site with your campus web application by determining how uPay accepts transaction parameters and how it passes parameters back to your campus web application.

Reviewing Merchant Settings

uPay sites are connected to Marketplace merchants, so before you build a uPay site, a Marketplace merchant must exist that can be used for the uPay site. This merchant is affected by several configuration settings, and some of these settings affect uPay sites.

You can see the merchant configuration settings by using the Marketplace Control Menu to navigate to Marketplace Home > [merchant name] > Settings.

Here are the key settings that you need to consider before setting up a uPay site:

- **Payment Gateway Host System Account**—Each Marketplace merchant uses a Payment Gateway host system account. This account contains payment information. It determines the acceptable credit cards, and it determines whether ACH payments can be accepted.

- **ACH Agreement Text**—The ACH agreement on the Merchant Settings page is used for all uPay sites created for this merchant. Customers must agree to this text before ACH payments are accepted.

- **Accounting Codes**—If you will be using general ledger functionality with your uPay site, you must also set up the applicable accounting codes. See Section 5.4, "Adding Accounting Codes" on page 111.

Planning uPay Customization

Before you start using Marketplace to build your uPay site, you should first consider the various uPay payment settings, as well as the customizable page text and text links. You should consider the available page layout options and have prepared images that can be used for the header and (if necessary) banner, as well as the continue and cancel buttons. For a thorough discussion of the configurable options, go to Section 10.2, "Planning Ahead for uPay" on page 204 and Section 10.3, "What uPay Customers See" on page 210.

Planning Campus Integration

Before you build a uPay site, you should be familiar with the campus web application that will be using uPay. For full integration with uPay, this campus web application must be capable of passing parameters to uPay that contain information about the transaction, such as a transaction ID and (if applicable) a dollar amount. In addition, this campus web application should be capable of accepting parameters that are passed back from uPay

via a posting URL, which is necessary in order for the campus web application to be updated after the transaction is processed. For a thorough discussion of campus integration, see Section 11.3, "Passing Parameters to Your uPay Site" on page 242 and Section 11.5, "Using a Posting URL" on page 254.

11.2   Using Marketplace to Build a uPay Site

To set up a uPay site, use the following steps:

1   Navigate to Marketplace Home > [merchant name] > uPay Sites > Add uPay Site.

2   Complete information on each screen, clicking the Continue button to move between screens.

Site Name and Layout

The first screen prompts you to choose a site name and layout.

Field Definitions:

Site name

The site name will appear in the Operations Center control menu and in reports. It will not be shown to the user who makes payments through the site.

[Layout Options]

Use the arrow controls to see the available layouts. When the layout you want is displayed on the screen, click Continue.

Payment Settings

The second page in uPay setup is the Payment Settings page. Here, you enter options that govern what types of payments can be made and what payment data is required.

Alumni Donations Payment Settings

Users see the Payment Amount prompt before the dollar amount field. The ACH Shared Secret prompt describes any validation you require for ACH payments.

Site uses T-Link:	○ Yes ◉ No
T-Link Web Service URL:	
Perform General Ledger Updates:	○ Yes ◉ No
Cashier ID (Banner only):	
Accounting Code:	
Payment Amount Prompt:	
Default Payment Amount (Example: 1234.56): $	
Minimum Payment Amount: $	
Maximum Payment Amount: $	

Payment Methods Accepted:

- ☐ webCheck
- ☐ AmEx
- ☐ Discover
- ☐ Visa
- ☐ MasterCard
- ☐ Departmental Charge

Allow the amount to be passed in?	○ Yes ◉ No
Require encoded validation key for amount?	○ Yes ◉ No (applies only if amount passed in)
Allow the user to edit the payment amount?	○ Yes ◉ No
Require address verification for credit card payment?	○ Yes ◉ No
Require the credit card verification value?	○ Yes ◉ No
Require bank account number to be entered twice?	○ Yes ◉ No (applies for ACH only)
Require address for ACH payment?	○ Yes ◉ No
ACH Shared Secret Prompt	
Show email address prompt?	◉ Yes ○ No
Require email address?	◉ Yes ○ No
Show External Transaction Id in email?	◉ Yes ○ No
Show External Transaction Id in URL?	◉ Yes ○ No

[Back] [Cancel] [Continue]

Field Definitions:

Site uses T-Link

If you are creating this uPay site to be used with a web application developed by a TouchNet Ready Partner, select Yes.

T-Link Web Service URL

If you selected Yes for "Site uses T-Link," you must enter the URL for the T-Link web service. In most cases, you will have already received this URL from the party that installed the web service. The web service is typically installed in the TouchNet DataCenter; however, if your campus has its own PCI-compliant DataCenter, this web service may have been installed on a campus server. You need to identify where the T-Link web service is installed and get the URL from the party that installed the web service. If you do not know where the web service is installed, you will need to contact your TouchNet support representative.

Perform General Ledger Updates

If you would like to use general ledger features to track revenue for your uPay site, you can turn on Marketplace's general ledger ability by clicking Yes. General ledger functionality is not available if you selected Yes for "Site uses Secure Payment Channels."

Once you turn on general ledger functionality, the Account Code dropdown menu becomes available.

Accounting Code

Once you turn on general ledger functionality, you can select an accounting code from the Accounting Code dropdown. The codes available in the dropdown menu must have been previously established at the merchant level. For more information about accounting codes, see "Adding Accounting Codes" on page 111.

Note: If your uPay site will be using a general ledger accounting code, you should set up the accounting code in Marketplace before beginning the process of adding a new uPay site. Go to Section 5.4, "Adding Accounting Codes" on page 111 and complete these instructions before you attempt to add a new uPay site.

Payment Amount Prompt

When a customer views your uPay site, this prompt appears beside the field that shows the dollar amount that the customer agrees to pay. For example, if the uPay site will be used in conjunction with a web application that sells parking passes, the prompt might say "Total fee"; however, if the uPay site will be used in conjunction with a web application that accepts alumni donations, the prompt might say "Donation amount".

Default payment amount

If the campus web application does not pass a payment amount to uPay, the Default Payment Amount value will be displayed to customers as the payment amount. If the payment amount is not passed to uPay, you can leave the default payment amount empty; however, in this situation, you must be sure to say Yes to the "Allow the user to edit the payment amount" option.

If you select No for "Allow the user to edit the payment amount," you must enter an amount in the "Default Payment Amount" field.

Note: For more information about passing a payment amount to uPay, see "Allow the amount to be passed in", described below.

Minimum and maximum payment amounts

You can leave either or both of these fields empty. The customer will be prompted to change the payment amount if the payment amount is lower than your minimum or higher than your maximum.

Payment methods accepted

This list of available payment methods comes from Payment Gateway's commerce configuration. It shows all the payment methods allowed for your host system account.

If you include the electronic banking (ACH) option, both savings and checking accounts will be allowed.

Allow the amount to be passed in

If you select Yes, then the amount passed from your web application will override any default payment amount.

Important! If you turn this option on, TouchNet recommends you also use the encoded validation key described below and on "Using the VALIDATION_KEY Option" on page 247. Otherwise, a user may be able to change the amount prior to form submission.

Note: For more details about passing data to uPay, see "Form Parameters" on page 238.

Require encoded validation key for amount?

If you are passing a validation key with the amount, select Yes. This option requires that you generate an encoded validation string. See "Creating a VALIDATION_KEY" on page 251 for details on creating this string. This option is not available if you chose Yes for "Site use Secure Payment Channels."

Using a validation key requires you also 1) enter a posting key for the uPay site (see "Posting Key" on page 230) and 2) pass an external transaction ID (EXT_TRANS_ID) from your application or web site (see "Form Parameter Details" on page 242).

Allow the user to edit the payment amount

If you select Yes, the user can change either your default payment amount or the amount that has been passed from your application.

Require address verification for credit card payment

If you select Yes, the customer will be required to provide the cardholder's street address, city, state, and ZIP code.

Note: Depending on how Payment Gateway has been configured, requiring data may result in the failure of transactions with incorrect data.

Require the credit card verification value?

If you select Yes, the user must enter this value. The credit card verification value is the number printed on the credit card, usually above the signature area or above the imprinted number.

Note: Depending on how Payment Gateway has been configured, requiring data may result in the failure of transactions with incorrect data.

Require bank account number to be entered twice?

If you select Yes, the user must enter the bank account number twice. This helps prevent accounting errors due to mis-typed but valid numbers.

Require address for ACH Payment

If you select Yes, the user will be required to provide a street address, city, state, and ZIP code.

ACH Payment Shared Secret Prompt

A shared secret value is a value that the user knows (for example, a birth year or the last four digits of an ID number). While the shared secret value is not required by uPay, it is a requirement of the NACHA rules for web-based ACH payments. Having users enter a shared secret value increases security of payments through electronic bank accounts.

The shared secret prompt you enter appears before the shared secret value field.

To use the shared secret value, you must pass it to uPay from your application. You can also pass a shared secret value prompt, which will override your Operations Center entry. See "Form Parameters" on page 238.

Show email Address Prompt?

If you select Yes, the user will be prompted to enter an e-mail address. This e-mail address will be used for sending the user an e-mail confirmation message at the conclusion of the payment process. If the uPay site will be used in conjunction with a campus web application but the web application does not have the ability to send out confirmation e-mail messages, you can turn on uPay's e-mail functionality by selecting Yes for Show Email Address Prompt? In addition, if your campus web application is capable of passing the user's e-mail address, uPay can receive this value as a form parameter when the campus web application launches the uPay and pre-populate the Show Email Address Prompt field with the user's e-mail address. For more information on passing parameters to uPay, see "Form Parameters" on page 238.

Require email Address?

If you select Yes, the user must enter an e-mail address in the Show Email Address Prompt field. This field is not available if No was selected for Show Email Address Prompt?

Note: The e-mail address fields on the uPay Payment Settings page are designed to provide uPay sites with the ability to generate e-mail confirmation messages to users upon the conclusion of the payment process. Do not use these fields unless you intend for uPay to generate e-mail confirmation messages.

Show External Transaction ID in E-Mail

If you select Yes, customers will see the external transaction ID in e-mail messages (both success e-mail messages and error e-mail messages).

Show External Transaction ID in URL

If you select Yes, the customers will see the external transaction ID as part of the URL for the cancel button, the success link, and the error link.

Recurring Payments

The third uPay setup screen is the Recurring Payments screen. Here, you enter all the options that allow users to set up repeated payments of the same amount.

If you selected Yes for "Site uses Linked Integration" on the uPay Payment Settings page, the uPay Recurring Payments page does not appear as part of the uPay site setup process. Recurring payments are not allowed with Linked Integration.

Field Definitions:

Allow recurring payments

If you set this option to yes, complete the rest of the options for the page. If you set the option to no, skip the rest of the options on this page.

Recurring payment prompt

This prompt asks the user whether they want to make a recurring payment. The prompt appears on the first page of your uPay site along with a yes or no selection for the user.

Maximum duration

Enter a number and specify whether it is a number of months or years. The most you can allow is 6 years. If you leave the number field empty, the maximum duration will be 6 years.

Accepted frequencies

When making a recurring payment, the user is asked, "How often will your payment recur?" The options you check here will appear in this dropdown selection list for the user.

ACH Agreement Text

Your ACH agreement performs two functions. It is your statement of terms and conditions for electronic payments. It is also your stored evidence of payment and the identity of the payer.

The text you enter on this page appears only for recurring payments. (Text for single payments is entered by a Marketplace administrator.) This allows you to modify your wording if needed so that the user agrees to the upcoming payments, not just a single payment.

Contact Information

This information is printed on the user's receipt. Enter information for the person who can refund payments or cancel an upcoming, scheduled payment.

Note: This information is important for the user because it provides him a contact if he wants to change or cancel his recurring payment. uPay does not provide self-service options where a user can change or cancel his own recurring payment.

Miscellaneous: Links, URLs, and E-mail

The next uPay setup screen is the Misc Settings screen, where you enter information about navigation out of a uPay site, contact e-mail information, and the URL used for posting collected data.

In the top part of the Misc Settings page, enter your posting URL settings if used.

Field Definitions:

Site Manager's E-mail Address

The Site Manager receives e-mail confirmations related to site setup.

Posting URL

If you choose to post payment data to a URL, enter that URL here. TouchNet strongly recommends use of https with this URL. For more information, see "uPay Site Reports" on page 320. This field does not appear if you selected Yes for "Site uses Linked Integration" on the uPay Payment Settings page.

Note: Technical details on the use of posting URLs or other technical details of web development are outside the scope of this guide.

Posting Key

The posting key is a value passed by uPay to the posting URL for security purposes. The posting key must match a value expected by the campus web application that is targeted with the posting URL. This field does not appear if you selected Yes for "Site uses Linked Integration" on the uPay Payment Settings page.

Post data to show when users click Cancel

If you want the posted data to include records of all cancelled transactions as well as successful transactions, select Yes. Whenever a user clicks the Cancel button to stop a transaction, the transaction details will be posted.

This field does not appear if you selected Yes for "Site uses Linked Integration" on the uPay Payment Settings page.

Text For Success Link

Not applicable if you chose Yes for "Site uses Secure Payment Channels" on the uPay Payment Settings page. This text appears on the receipt page that a customer receives after a payment is successfully processed. This text is hyperlinked with the URL that you provide in the following field. This field does not appear if you selected Yes for "Site uses Linked Integration" on the uPay Payment Settings page.

Success Link URL

If you chose Yes for "Site uses Secure Payment Channels" on the uPay Payment Settings page, this field indicates where the customer will be automatically redirected after entering payment information in uPay. To determine the value for this field, you should contact your TouchNet Ready Partner. This field must contain a URL that points at a location in the TouchNet Ready Partner's web application. If you chose No for "Site uses Secure Payment Channels," this field represents the location in your campus web application where customers will be directed after clicking the success link on the receipt page. This field does not appear if you selected Yes for "Site uses Linked Integration" on the uPay Payment Settings page.

Return Link URL

This field only appears if you selected Yes for "Site uses Linked Integration" on the uPay Payment Settings page. Enter in this field the URL for the destination in the TouchNet Ready Partner's web application to which uPay should return parameters after accepting the customer's payment information. If you do not know this value, contact the TouchNet Ready Partner.

The Error Link is used only for system failures. For payment method entry errors, the user may re-enter payment data.	
Text For Error Link:	We're sorry, an error has occurred. Please try ag
Error Link URL:	
The text entered below is used for the alternate text for the Cancel Button. The Cancel Link is used to navigate the user's browser when they press the Cancel Button.	
Text For Cancel Link:	Cancel this payment transaction.
Cancel Link URL:	

In the middle part of the Misc Settings Page, enter URLs and link text for navigation out of the uPay site

Text for Error Link

If a Marketplace/uPay system failure takes place, this text will appear on the error page.

Error Link URL

This URL will be used with the error link text above. By clicking this link, the customer is taken to a location in the campus web application.

If you chose Yes for "Site uses Linked Integration" on the uPay Payment Settings page, you should contact your TouchNet Ready Partner to determine the URL; in this situation, this field must contain a URL that points at a location in the TouchNet Ready Partner's web application.

Text For Cancel Link

This text appears as ALT text for the Cancel button that appears on each uPay page. This text appears in Internet Explorer when the customer places their cursor over the Cancel button. This text does not appear in Firefox.

Cancel Link URL

This URL will be used when the customer clicks on the uPay Cancel button. By clicking this button, the customer is taken to a location in the campus web application.

If you chose Yes for "Site uses Linked Integration" on the uPay Payment Settings page, you should contact your TouchNet Ready Partner to determine the URL; in this situation, this field must contain a URL that points at a location in the TouchNet Ready Partner's web application.

In the last part of the Misc Settings page, enter privacy information.

Text For Privacy Link

A text link for your institution's Privacy Policy appears on each uPay page. The text for this link can be customized.

Privacy Link URL

When the customer clicks on the Privacy Policy link, they are taken to a page that provides your institution's Privacy Policy. If your institution

maintains its own privacy policy page external to uPay, you can link directly to that page by entering the URL in this field.

Privacy Text
If you do not have a separate URL for your privacy policy, you can enter the wording for your privacy policy here. This text will appear on a uPay page when the user clicks the link you created with your Privacy Link Text.

Messages and Titles

The next uPay setup screen is the Messages and Titles screen. Here, you customize the page names that appear in the user's browser title bar and the messages that the user sees at the top of uPay pages.

Entering text in the Payment Method Selection fields updates this uPay page.

Entering text in the Credit Card fields has the following effects.

Entering text in the Electronic Banking fields has the following effects.

The text you enter in the Receipt Page fields affects what the customer sees at the end of the payment process.
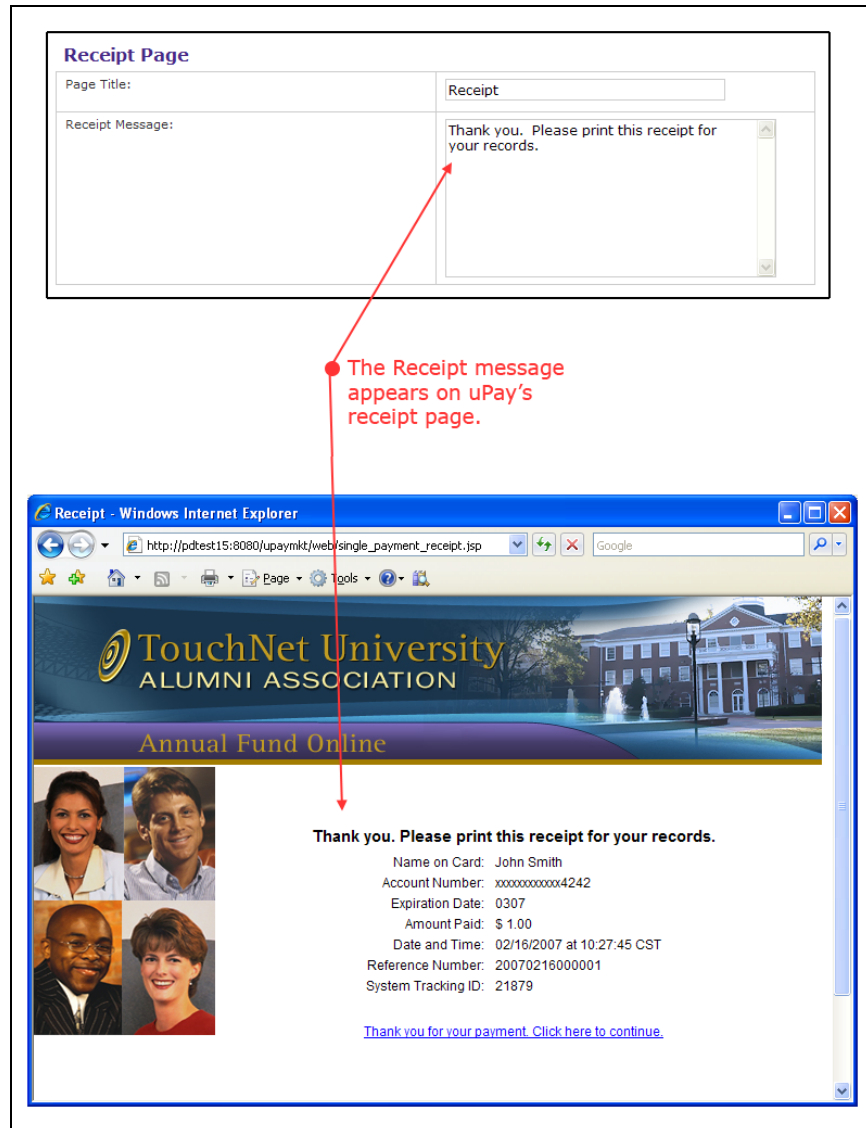
uPay Site Manager

The next uPay setup screen is the User Settings screen, where you select or add a uPay Site Manager.

Donations User Settings

If you create a new site manager user, notify that user of the login name and password for the first login.

Choose Site Manager	[▼]
- OR -	
Site Manager's Name:	[ ]
Site Manager's Password:	[ ]
Confirm Password:	[ ]

[Back] [Cancel] [Continue]

Select a Site Manager from the list of users, or create a new uPay Site Manager user. You can select yourself as the Site Manager; you can also add additional Site Managers later. (See "Adding or Changing Site Managers" on page 263.)

Important! If you add a new Site Manager, be sure to tell the new user the login name and password. They will need these values for the first login.

Verify Site Info

The last page in uPay setup allows you to verify your site information. Review all the information displayed on this page. If you want to change information, click the corresponding edit button.

When you are satisfied with your setup, click the Create uPay Site button.

Form Parameters

Next, uPay displays your site's form parameters. These include optional and required parameters. Your campus web application passes these parameters to uPay when the customer clicks to make a payment.

uPay Site Creation Successful

Your uPay Site is now ready to be used. To upload custom graphics for this site, use the button below.

Your upay site has been created successfully.

Below are the parameters that can be passed to the upay application and will be understood by the application.

For security puposes you must pass the parameters using the post method.

Required Parameters

UPAY_SITE_ID=6	Used to access the uPay site.

Optional Parameters

BILL_EMAIL_ADDRESS	Used to pass the billing email address.
BILL_STREET1	Used to pass the billing street address 1.
BILL_STREET2	Used to pass the billing street address 2.
BILL_CITY	Used to pass the billing city.
BILL_STATE	Used to pass the billing state.
BILL_POSTAL_CODE	Used to pass the billing postal code.
BILL_COUNTRY	Used to pass the billing country.
EXT_TRANS_ID	Used as a cross reference between the external site and a uPay site.
EXT_TRANS_ID_LABEL	Used to describe the EXT_TRANS_ID value on the payment receipt.
AMT	Used to pass the amount to be paid.
SSV	Used to pass the shared secret for ACH payments.
SSV_PROMPT	Used to generate the prompt for entering their shared secret.
VALIDATION_KEY	Used to assure that the amount being passed in has not been altered prior to form submission.
RECURRING_USER_CAN_CHANGE	End user can change the schedule from what is passed. (true or false)
RECURRING_CAN_CHANGE_END_DATE_TO_CC_EXP_DATE	Schedule can change end date to match credit card expiration date if expiration date is before end date. (true or false)
RECURRING_START_DATE	Date recurring payments start. (mm/dd/yyyy)
RECURRING_END_DATE	Date recurring payments end. (mm/dd/yyyy)
RECURRING_FREQUENCY	Frequency for recurring payments. Must be value, not name.

Passed Value	Frequency
4	Weekly
1	Monthly
2	Bi-Monthly
5	Quarterly
6	Semi-Annually
7	Annually

RECURRING_NUMBER_OF_PAYMENTS	Number of payments instead of end date.
SUCCESS_LINK	Used to pass a new url for the success link.
SUCCESS_LINK_TEXT	Used to pass the text for the success link.
ERROR_LINK	Used to pass a new url for the error link.
ERROR_LINK_TEXT	Used to pass the text for the error link.
CANCEL_LINK	Used to pass a new url for the cancel button.
CANCEL_LINK_TEXT	Used to pass the text for the success button.
CREDIT_ACCT_CODE	Used to pass credit accounting code to override the Upay default accounting code.
DEBIT_ACCT_CODE	Used to pass debit accounting code to override the Payment accounting code.

You may now take this opportunity to upload custom images for your newly created uPay Site.

Upload Custom Images

Your uPay site can take actions based on the values you pass for these parameters. Your uPay site can accept additional parameters besides the ones listed; however, it will take no actions based on the additional parameters other than to pass these parameters back to the posting URL after the transaction has been processed.

You should take note of the form parameters so you will know the range of information that can be passed to your uPay site and can utilize the parameters as necessary to fulfill the needs of your campus web application.

For details on the form parameters, see Section 11.3, "Passing Parameters to Your uPay Site" on page 242.

When you finish using the Form Parameters page, you can click the Upload Custom Images button to work with images for your site.

Note: You can return to the Form Parameters page at any time by using the uPay site's Form Parameters link in the Control Menu.

uPay Site Images

The Image Settings page appears if you clicked the Upload Custom Images button on the Form Parameters page (when creating a new uPay site). This page also appears when you navigate to the uPay site's Image Settings:

Marketplace Home > [Merchant Name] > uPay Sites > [uPay Site Name] > Image Settings
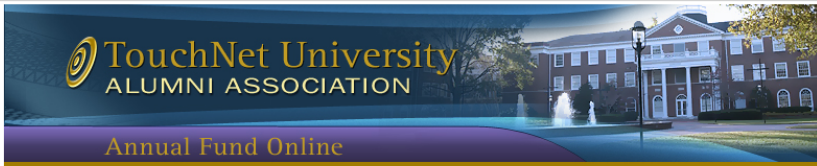
Select images for your layout in the Image Management page

The images you can upload depend on the layout you have selected in the Layout Selection page. For instance, if your layout doesn't use a banner graphic, you won't see it in your uPay site. You can customize these graphics:

- **Banner**—Appears down the left-hand side of your uPay site pages.

- **Header**—Appears across the top of your uPay site pages.

- **Footer**—Appears across the bottom of your uPay site pages.

- **Cancel and Continue buttons**—Appear on each page below fields that the user completes.

Graphics Specifications

The recommended width and height of the uPay site graphics are determined by your layout selection (see "Site Name and Layout" on page 221). To view the recommended width and height (in pixels), navigate to the following page:

Marketplace Home > [Merchant Name] > uPay Sites > [uPay Site Name] > Image Management

This page displays all the images currently being used by the uPay site, as well as the recommended width and height.

Use graphics in JPG, GIF, or PNG format. The maximum graphics file size is 250K.

11.3   Passing Parameters to Your uPay Site

For uPay to integrate with a campus web application, the campus web application must be able to pass parameters that describe the transaction. At a minimum, the campus web application must pass a uPay site ID that identifies which uPay site will handle the transaction. In addition, in order for a transaction to be identified and tracked, the campus web application must pass a transaction ID (called EXT_TRANS_ID by uPay).

Some parameters can be used to automatically populate fields on your uPay site. For example, the customer's billing address can be passed to uPay so that the customer isn't required to re-enter this information. Likewise, a dollar amount can be passed directly to uPay.

You do not need to tell Marketplace which parameters you will be passing. You only need pass the parameters when directing a customer to your uPay site. uPay will accept any parameters that you pass and in turn pass the parameters back to your campus web application after the transaction is processed (provided you use the posting URL option, as described in Section 11.5, "Using a Posting URL" on page 254).

Form Parameter Details   In order for uPay to take action on passed parameters (such as pre-populating the billing address fields or the dollar amount field), the parameters must be named as described below.

If the campus web application passes recurring payment data—RECURRING_FREQUENCY, RECURRING_START_DATE, and RECURRING_NUMBER_OF_PAYMENTS or RECURRING_END_DATE—to the uPay site, uPay will then take that data and calculate the payment schedule.

Note: To receive back the payment parameters after the payment is completed in uPay, a posting URL must be used, as described in "Using a Posting URL" on page 254. If recurring payments are used, this payment information becomes critical for monitoring the payment process. For example, if recurring payment parameters are sent to the Posting URL, the campus web application will have a record of when the last payment is due.

The following list describes all the parameters that uPay can use. A list of these parameters is also available on the Form Parameters page of the uPay site.

uPay takes actions on the following parameters.

- **UPAY_SITE_ID**—Required. This is a numerical value unique to each uPay site. The value is displayed in the Form Parameters page for the uPay site.

- **BILL_NAME**—Used to pass the billing name.

- **BILL_EMAIL_ADDRESS**—Used to pass the billing e-mail address.

- **BILL_STREET1**—Used to pass the billing street address 1.

- **BILL_STREET2**—Used to pass the billing street address 2.

- **BILL_CITY**—Used to pass the billing city.

- **BILL_STATE**—Used to pass the billing state.

  The billing state should be passed as the two-character state abbreviation. For foreign addresses, "--" can be passed to uPay in order to select "Not applicable" for the state field.

- **BILL_POSTAL_CODE**—Used to pass the billing postal code.

  To accommodate foreign addresses, uPay will accept up to 30 characters in the postal code parameter.

- **BILL_COUNTRY**—Used to pass the billing country.

- **EXT_TRANS_ID**—Optional. This is the unique ID generated by the campus web application. It serves as a cross-reference between the web application and Marketplace. If this parameter is passed to uPay, it will be stored in the Marketplace database along with the payment information.

  If you are posting payment results to an external URL, this parameter will be sent along with the posted data.

Using EXT_TRANS_ID as the field name of the transaction ID that you pass to uPay allows you to use Marketplace's uPay Payment Search functionality to search for payments with a specified EXT_TRANS_ID value. In addition, you will be able to view the EXT_TRANS_ID values on Marketplace's Posting Status Report.

- **EXT_TRANS_ID_LABEL**—Optional. This field can contain a description of the EXT_TRANS_ID value. If this parameter is used, this description appears on the receipt that the customer sees at the end of the uPay payment process.

- **AMT**—Optional. If used, this parameter fills in the payment amount field in uPay. To use this parameter, you must configure your uPay site to allow the amount to be passed in. This option is in the Payment Method Settings page for your uPay site. By default, T-Link expects the payment amount to be passed with the AMT parameter from the web application. If a payment amount is not passed, the uPay site's default payment amount will be displayed to the customer. For more about payment settings, see "Payment Settings" on page 222.

- **SSV**—This parameter can be used only used if you accept ACH payments. This is the Shared Secret Value that the user enters on the ACH agreement page when paying by checking or savings account.

  A shared secret value is an alphanumeric value that the user knows, for example, their birth year or their mother's maiden name. While the shared secret value is not required by uPay, it is a requirement of the NACHA rules for web-based ACH payments. Having users enter a shared secret value increases security of payments through electronic bank accounts.

- **SSV_PROMPT**—This parameter can only be used if you accept ACH payments. The SSV_PROMPT is used when the user pays by checking or savings account. If passed, it overrides your setting for the Shared Secret Value prompt. This is the prompt shown to users so they know what to enter for the Shared Secret value. If the prompt value is not passed, uPay uses the prompt you define in the Payment Method Settings page.

- **VALIDATION_KEY**—This option requires you to use the posting key (as described in "Miscellaneous: Links, URLs, and E-mail" on page 229). For security, it is highly recommended that you use the posting key when you are allowing an amount to be passed to the uPay site. The posting key is used to assure that the amount being passed in has not been altered prior to form submission.

  For details on using a VALIDATION_KEY, see Section 11.4, "Using the VALIDATION_KEY Option" on page 247.

- **RECURRING_USER_CAN_CHANGE**—Optional. If the uPay site accepts recurring payments, this parameter determines whether the

customer can change the recurring payment values that are passed by the campus web application. Accepted values: True or False.

Note: If RECURRING_USER_CAN_CHANGE=false, uPay must receive RECURRING_START_DATE, RECURRING_FREQUENCY and RECURRING_END_DATE or RECURRING_NUMBER_OF_PAYMENTS. If uPay does not receive these values, uPay will display an error message to the customer.

- **RECURRING_CAN_CHANGE_END_DATE_TO_CC_EXP_DATE**—If recurring payment parameters are being sent to the uPay site, this parameter determines what happens if the customer enters a credit card expiration date that will occur *before* the projected end date of the payment plan. Accepted values: Yes or No.

  If RECURRING_EXP_DATE_CHANGE=Yes and the customer enters a credit card expiration date that will occur before the projected end date of the payment plan, uPay will automatically change the payment plan's end date so it comes before the credit card expiration date. If RECURRING_EXP_DATE_CHANGE=No and the customer enters a credit card expiration date that will occur before the projected end date of the payment plan, uPay will prompt the customer to use a different credit card.

  Example: The customer uses the campus web application to make a monthly donation of $100. In the campus web application, the customer enters the following information for the recurring payment plan: start date - 10/26/2008, frequency - monthly, and end date - 06/26/10. This information is passed to uPay by the campus web application, at which point the customer enters their credit card information. The customer enters a credit card expiration date of 04/10—which predates the payment plan's end date. Because the campus web application sent RECURRING_EXP_DATE_CHANGE=Yes, uPay automatically changes the date of the last payment to 4/26/10. The monthly donation remains unchanged at $100.

Important!
RECURRING_CAN_CHANGE_END_DATE_TO_CC_EXP_DATE=Yes should only be used in situations in which it is acceptable that the total dollar amount of payments made over the course of a payment plan be reduced by the elimination of one or more payments. RECURRING_CAN_CHANGE_END_DATE_TO_CC_EXP_DATE=Yes might work well with donations, in which the alternative of the customer canceling the entire payment plan would be less desirable than the elimination of one or more payments within a plan. In contrast, the elimination of payments for a product that is actually delivered to the

customer, such as a parking pass or a football season ticket, would most likely be considered unacceptable.

- **RECURRING_START_DATE**—If the uPay site accepts recurring payments, this parameter determines the start date for the recurring payment plan. Required date format: mm/dd/yyyy.

- **RECURRING_END_DATE**—If the uPay site accepts recurring payments, this parameter determines the end date for the recurring payment plan. Required date format: mm/dd/yyyy.

- **RECURRING_FREQUENCY**—If the uPay site accepts recurring payments, this parameter sets the frequency of the payment plan. Accepted values: 1 (Monthly), 2 (Bi-Monthly), 4 (Weekly), 5 (Quarterly), 6 (Semi-Annually), and 7 (Annually).

  Note: For RECURRING_FREQUENCY, be sure to use the accepted numerical values. For example, to set up a weekly recurring payment plan, send RECURRING_FREQUENCY = 4; Do not send RECURRING_FREQUENCY = Weekly.

- **RECURRING_NUMBER_OF_PAYMENTS**—If the uPay site accepts recurring payments, this parameter determines the number of payments in the payment plan.

  Note: If both RECURRING_NUMBER_OF_PAYMENTS and RECURRING_END_DATE are passed to uPay, uPay will use RECURRING_NUMBER_OF_PAYMENTS to calculate the payment schedule.

- **SUCCESS_LINK**—Optional. When you establish a uPay site, you enter a URL for the success link that appears on the receipt page the customer sees after successfully making a uPay payment. Instead of providing the same URL for all customers, you can customize the success link URL. For example, for customers identified as students, you might return them to a student portal web site, while parents might be returned to a portal designed for the parents of students.

- **SUCCESS_LINK_TEXT**—Optional. This text appears as a hyperlink on the receipt page that customers see after successfully making a payment with uPay. While the SUCCESS_LINK parameter provides the URL for the hyperlink, the SUCCESS_LINK_TEXT parameter provides the text for the hyperlink.

- **ERROR_LINK**—Optional. When you establish a uPay site, you enter a URL for the error link that appears on the error page that the customer sees when a system error occurs while attempting to make payment. Instead of providing the same URL for all customers, you can customize the link that appears when an error is encountered.

- **ERROR_LINK_TEXT**—Optional. This text appears as a hyperlink on the error page that customers see after a system error occurs while attempting to make a payment with uPay. While the ERROR_LINK parameter provides the URL for the hyperlink, the ERROR_LINK_TEXT parameter provides the text for the hyperlink.

- **CANCEL_LINK**—Optional. When you establish a uPay site, you enter a URL for the cancel link that appears throughout your uPay site. Instead of providing the same URL for all customers, you can customize the link that appears when an error is encountered.

- **CANCEL_LINK_TEXT**—Optional. This text appears when a uPay customer places their cursor over the Cancel button. (Only works with Microsoft Internet Explorer.) In the HTML for the uPay site, this text is added as the ALT attribute of the Cancel button (which appears in the HTML as an IMG tag).

- **CREDIT_ACCT_CODE**—(Only displayed for Banner users.) This parameter contains the credit accounting code.

- **DEBIT_ACCT_CODE**—(Only displayed for Banner users.) This parameter contains the debit accounting code.

11.4 Using the VALIDATION_KEY Option

Important! While some steps in the process of creating a VALIDATION_KEY are done with the Marketplace Operations Center, the majority of steps must be performed by an administrator with privileges for configuring the campus web application that will be used with uPay. You should forward the following instructions to the campus web application administrator.

Important! To use the VALIDATION_KEY option, the campus web application administrator must have prior experience in MD5 (Message-Digest algorithm 5) and Base64 encoding. It is beyond the scope of this document to describe how to create an MD5 hash. Likewise, it is beyond the scope of the document to describe how to perform Base64 encoding.

For security purposes, it is highly recommended that you use the VALIDATION_KEY option when you are allowing a dollar amount to be passed to a uPay site from a campus web application. The

VALIDATION_KEY is used to ensure that the amount being passed has not been altered.

To use the VALIDATION_KEY option, a campus web application must be configured to generate a VALIDATION_KEY value (as described in the following sections) for each transaction and to forward these values to the corresponding uPay site. This campus application must be able to perform MD5 and Base64 encoding. *This encoding must be done dynamically by the campus web application for each transaction sent to a uPay site.*

For a uPay site to use the VALIDATION_KEY option, the following actions are required:

1   The Marketplace uPay site manager must add a Posting_key to the uPay site.

2   The Marketplace uPay site manager must turn on the VALIDATION _KEY option (and adjust other related uPay site options),

3   The campus web application administrator must configure the campus web application to dynamically generate a VALIDATION_KEY for each transation, and

4   The campus web application must pass the VALIDATION_KEY parameter (and other required parameters) to the uPay site.

The following sections of this document provide the details for using the VALIDATION_KEY option.

Adding a Posting_Key

The Posting_Key is a unique identifying code used to enforce tighter security for uPay sites. The Posting_Key value comes into play when a campus web application uses the VALIDATION_KEY option, in which case the Posting_Key value is used in conjunction with other values to determine the VALIDATION_KEY value. Therefore, in order for a uPay site to use the VALIDATION_KEY option, the uPay site must be configured with a Posting_Key value.

You should work with the administrator of the campus web application to determine the Posting_Key value and then use the Marketplace Operations Center to add the Posting_Key to the uPay site.

Use the following steps to add a Posting_Key to a uPay site:

1   Go to the following page in the Operations Center: Marketplace Home > [merchant name] > uPay Sites > [upay site name] > Miscellaneous Settings

2   Enter a value in the Posting_Key field. This field accepts a maximum of 30 alphanumeric characters.

3   Click the Save button.

Turning On the VALIDATION_KEY Option

To turn on the VALIDATION_KEY option, follow these steps:

1 Go to the following page in the Operations Center: Marketplace Home > [merchant name] > uPay Sites > [upay site name] > Payment Settings

Alumni Donations Payment Settings

Users see the Payment Amount prompt before the dollar amount field. The ACH Shared Secret prompt describes any validation you require for ACH payments.

Site uses T-Link:	○ Yes ◉ No
T-Link Web Service URL:	[ ]
Perform General Ledger Updates:	○ Yes ◉ No
Cashier ID (Banner only):	[ ]
Accounting Code:	[▼]
Payment Amount Prompt:	[ ]
Default Payment Amount (Example: 1234.56): $	[ ]
Minimum Payment Amount: $	[ ]
Maximum Payment Amount: $	[ ]
Payment Methods Accepted:	

☐ webCheck

☐ AmEx

☐ Discover

☐ Visa

☐ MasterCard

☐ Departmental Charge

Allow the amount to be passed in?	○ Yes ◉ No
Require encoded validation key for amount?	○ Yes ◉ No (applies only if amount passed in)
Allow the user to edit the payment amount?	○ Yes ◉ No
Require address verification for credit card payment?	○ Yes ◉ No
Require the credit card verification value?	○ Yes ◉ No
Require bank account number to be entered twice?	○ Yes ◉ No (applies for ACH only)
Require address for ACH payment?	○ Yes ◉ No
ACH Shared Secret Prompt	[ ]
Show email address prompt?	◉ Yes ○ No
Require email address?	◉ Yes ○ No
Show External Transaction Id in email?	◉ Yes ○ No
Show External Transaction Id in URL?	◉ Yes ○ No

Back **Cancel** **Continue**

The Payment Settings page for a uPay site.

2   Select Yes for "Allow the amount to be passed in?"

3   Select Yes for "Require encoded validation key for amount?"

Note: After you turn on this option, customers can only reach the uPay site via the campus web application. This web application must be configured to pass a VALIDATION_KEY, as described in the following sections of this chapter. If you direct customers directly to the uPay site–without passing a VALIDATION_KEY–the uPay site will fail to load.

4 In addition, you should consider the following fields:

- **Allow the user to edit the payment amount?**—If you do not want the dollar amount to be changed when the customer arrives at the uPay site, you should select No. In this situation, the dollar amount passed in will be displayed, but it will not be editable. If you select Yes, the customer will be able to edit the amount, possibly even choosing a smaller amount (as dictated by the amount entered in the Minimum Payment Amount field).

- **Minimum Payment Amount**—You should ensure that the amount being passed in is equal to or greater than the amount entered in the Minimum Payment Amount field. If the minimum payment amount is greater than the amount being passed in, Marketplace will not be able to complete the transaction.

- **Maximum Payment Amount**—You should ensure that the amount being passed in is equal to or less than the amount entered in the Maximum Payment Amount field.

5 Click the Save button.

Creating a VALIDATION_KEY

Important! The process of creating a VALIDATION_KEY is done outside of the Marketplace Operations Center. You should forward the following information regarding the creation of a VALIDATION_KEY to the administrator responsible for the campus web application that will communicate with uPay.

The process of creating a VALIDATION_KEY should be accomplished dynamically by the campus web application that communicates with a uPay site. The following steps should not be considered static steps that create a static value. These steps should be dynamically performed by the campus web application after the EXT_TRANS_ID value and the transaction dollar amount have been determined:

1 Create a text string in this format:
[Posting_Key][EXT_TRANS_ID][AMT].

- **Posting_Key** — The Posting_Key is a unique identifying code used to enforce tighter security within Marketplace. The uPay site manager and the administrator of the campus web application

must agree on this value. The value must be stored as part of the campus web application. The uPay site must also be configured with this value, as described in "Adding a Posting_Key" on page 248. This value is a maximum of 30 alphanumeric characters.

- **EXT_TRANS_ID** — This is the unique ID generated by the web site that is passing the dollar amount to the uPay site. The ID serves as a cross-reference between the external system and Marketplace. This value should be generated dynamically by the campus web application.

- **AMT** — The dollar amount of the transaction. This amount MUST include two decimal places. For example, $25 would become 25.00 in the text string.

Note: Do not include brackets or plus signs in the text string. For example, for the following values—posting_key = EDR123, EXT_TRANS_ID = ENG4, AMT = $25.00—the text string would be EDR123ENG425.00.

2 Create an MD5 hash using the text string.

3 Base64 encode the MD5 hash.

Note: MD5 hash values are typically in hex format, so you will need the ability to Base64 encode a value in hex format. If you cannot Base64 encode a value in hex format, you can decode the MD5 hash into ASCII text and then perform Base64 encoding. If you are using a Base64 encoding tool, be sure you are using values in the proper format. For example, if you place a hex format value into the ASCII text field of a Base64 encoding tool, you will NOT get a correct result.

4 Pass this value to the uPay site, as described in "Passing a VALIDATION_KEY to a uPay Site" on page 253 .

An Example of Creating a VALIDATION_KEY

Here is an example of creating a VALIDATION_KEY. We will use the following values: Posting_Key = EX123, EXT_TRANS_ID = 123456, and AMT = 100.00. Here is the resulting text string for these values:

```
EX123123456100.00
```

When you encode this text string, here is the resulting MD5 hash:

```
231cd7f8e0151f6e0c4a60b33752a1e7
```

When you encode this MD5 hash value (which is in hex format), here is the resulting Base64 value:

```
IxzX+OAVH24MSmCzN1Kh5w==
```

This value is the VALIDATION_KEY. If any of the input values are changed (even if only slightly), the VALIDATION_KEY value will be very different.

Passing a VALIDATION_KEY to a uPay Site

Important! The process of passing a VALIDATION_KEY to a uPay site is done by a campus web application. You should forward the following information to the administrator responsible for the campus web application that will communicate with uPay.

When transactions are initiated by a campus web application that uses the VALIDATION_KEY option, the web application must be configured to dynamically generate a VALIDATION_KEY value (as described in "Creating a VALIDATION_KEY" on page 251) and then pass this value to the corresponding uPay site.

Here is the uPay site URL:

http://[server]/[context]/web/index.jsp

Note: You must make the following edits to the URL displayed above: 1) determine whether your institution uses "http" or "https", 2) determine the name/domain of the server where uPay is installed and replace [server] with this value, and 3) determine the context path for uPay and replace [context] with this value. The default context path is **upay**. If you do not know the server name or the context path, you should contact your Marketplace administrator.

Important! When passing parameters, the campus web application must use the "POST" method. The uPay site will not accept parameters from a "GET" method.

The following table describes the key parameters that must be passed to launch the uPay site and utilize the VALIDATION_KEY:

Parameter	Description
UPAY_SITE_ID	**Note:** UPAY_SITE_ID is a numerical value unique to each uPay site. Get this value from the uPay site manager. The uPay site manager can determine this value by viewing the Form Parameters page of the uPay site (Marketplace Home > [merchant name] > uPay Sites > [upay site name] > Form Parameters).

Parameter	Description
EXT_TRANS_ID	**Note:** EXT_TRANS_ID is the unique ID generated by the campus web application web site that is passing the dollar amount to the uPay site. Be sure you use the same value that was used when the VALIDATION_KEY was created.
AMT	AMT is the dollar amount of the transaction. Be sure you use the same value that was used when the VALIDATION_KEY was created.
VALIDATION_KEY	Use the VALIDATION_KEY value that you determined in "Creating a VALIDATION_KEY" on page 251.

When the parameters are passed to the uPay site, the site loads in the customer's browser with the payment amount pre-populated. The uPay site is now ready for the customer to select a payment method and complete the transaction.

11.5   Using a Posting URL

After a transaction is processed, uPay can pass parameters describing the transaction back to a campus web application. This information can include parameters that were initially passed to uPay from a campus web application, such as a transaction ID (as described in "Passing Parameters to Your uPay Site" on page 242). In addition, these parameters can include information about the status of the transaction (as determined by Payment Gateway). When this information is posted to the campus web application, the status of the transaction can be updated on the campus system.

Note: Campus web applications do not necessarily need to pass a transaction ID to uPay; however, without a transaction ID the campus organization will have no way to match payment information with customer information. In effect, the campus organization would be accepting payments blindly, which might be acceptable for donations; however, even with donations, the campus organization would almost certainly want to track information about the donor beyond the payment fields required for monetary transactions in uPay.

Adding a Posting URL to a uPay Site

If you choose to post payment data to a URL, you specify that URL on the uPay site's Miscellaneous Settings page:

1 Navigate to Marketplace Home > [merchant name] > uPay Sites > [uPay site name] > Miscellaneous.

Alumni Donations Misc Settings

Use success, error, cancel, and privacy links to direct users to your pages.

Site Manager's E-mail Address:	
Contact E-mail Address:	

If you wish to have payment results and other useful data posted to your application, you can use the Posting URL. This URL is not used to navigate the user's browser. It is used only to update your application. The Posting Key is used to enforce tighter security within your application.

Posting URL (optional):	
Posting Key:	
Post data to show when users click Cancel?	◯ Yes ◉ No

The Success Link you define here appears after a successful payment. It is used to navigate the user's browser back to your application.

Text For Success Link:	Thank you for your payment. Click here to continu
Success Link URL:	

2 Enter the posting URL in the Posting URL field.

Note: To determine the posting URL, contact the administrator of the campus web application that will be targeted.

3 (Optional) Enter a posting key in the Posting Key field. This value is passed by uPay to the posting URL for security purposes. It must match a value expected by the campus web application that is being targeted by the posting URL.

Important! All Marketplace installations in the TouchNet DataCenter must use a posting key.

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4 (Optional) Select the Yes radio button if you would like to post parameters to the posting URL when the customer clicks the uPay site's Cancel button.

5 Click the Save button.

Important! TouchNet strongly recommends the use of https with the posting URL. For TouchNet DataCenter installations, https *must* be used for the posting URL.

Important! For TouchNet Data Center installations, you must contact TouchNet Customer Care when considering the use of a posting URL because TouchNet will need to open the firewall so that the uPay site can communicate with the campus web application.

Posting-URL Parameters

Once your uPay site has been configured to use a posting URL, transaction parameters will be passed by uPay to the posting URL. The customer's browser is not navigated to the posting URL, but the parameters are posted to it. The campus application targeted by the posting URL must be able to process these parameters. It is your responsibility to contact the administrator of the campus web application and provide that person with information about the posting-URL parameters.

Important! Technical details on configuring a campus web application to accept the parameters passed to a posting URL are outside the scope of this document.

The following parameters are posted along with any other parameters that the campus web application initially passed to uPay:

Transaction	Parameters (and Examples)	Description
Credit Card	posting_key = [key-goes-here]	A security value specified when the uPay site was built. (See "Miscellaneous: Links, URLs, and E-mail" on page 229.)
	tpg_trans_id = 2050504000001	A reference number assigned by Payment Gateway.
	pmt_status = success	Status of the transaction as reported by Payment Gateway. Either "success" or "cancelled" for single payments.
	pmt_amt = 1234.56	Amount of the transaction processed by Payment Gateway.
	pmt_date = 05/04/2005	Date the transaction was processed by Payment Gateway.
	name_on_acct = joe payer	Name on credit card account.
	• acct_addr = 123 Some Street • acct_addr2 = Suite 200 • acct_city = Somecity • acct_state = KS • acct_zip = 12345	These parameters are passed only if the uPay site has been set up to require address verification data. (See "Payment Settings" on page 222.)
	• acct_email_address	The customer can be required to enter an e-mail address or this field can be optional.
	• acct_phone_day • acct_phone_night • acct_phone_mobile	The phone fields are optional entry fields for customers.
	card_type = MasterCard	Type of credit card.
	EXT_TRANS_ID = 23423424	A unique ID generated/assigned by your campus web application. This value is posted only if it was initially passed to uPay from the campus web application. Maximum allowable length of EXT_TRANS_ID: 250 characters.
	UPAY_SITE_ID = 4	A unique ID that identifies the uPay site. Assigned when the uPay site was created.
	sys_tracking_id = 1234	An internal Marketplace identifier (also known as the order ID) that is also displayed to the customer on the uPay receipt page.
	recurring_payment_type = setup	This value is specified if the payment is a recurring payment. Two values are possible: "setup" (for the initial setup of a recurring payment plan) and "payment" (for one payment in a recurring payment plan).
	recurring_setup_number_of_payments = 2	This value is specified for recurring payment plans and indicates the total number of payments in the plan.
	recurring_setup_start_date = 11/17/2008	This value is specified for recurring payment plans and indicates the date of the first payment in the plan.
	recurring_setup_end_date = 11/24/2008	This value is specified for recurring payment plans and indicates the date when the payment plan ends. If this date does not coincide with a scheduled payment date (as determined by the selected frequency and start date), the final payment will be the last regularly scheduled payment date before the "recurring_setup_end_date"
	recurring_setup_frequency = 4	This numerical value is specified for recurring payment plans and indicates the frequency of payments: 4 = weekly, 1 = monthly, 2 = bi-monthly, 5 = quarterly, 6 = semi-annually, and 7 = annually.

Transaction	Parameters (and Examples)	Description
ACH	posting_key = [key-goes-here]	A security value specified when the uPay site was built. (See "Miscellaneous: Links, URLs, and E-mail" on page 229.)
	tpg_trans_id = 2050504000001	A reference number assigned by Payment Gateway.
	pmt_status = success	Status of the transaction as reported by Payment Gateway. Either "success" or "cancelled."
	pmt_amt = 1234.56	Amount of the transaction processed by Payment Gateway.
	pmt_date = 05/04/2005	Date the transaction was processed by Payment Gateway.
	name_on_acct = joe payer	Name on bank account.
	• bank_name = 123 Some Street • bank_addr1 = Somecity • bank_addr2 = KS • bank_routing = 12345	These values are obtained from Payment Gateway based on the routing number entered
	• acct_email_address	The customer can be required to enter an e-mail address or this field can be optional.
	• acct_phone_day • acct_phone_night • acct_phone_mobile	The phone fields are optional entry fields for customers.
	EXT_TRANS_ID = 23423424	A unique ID generated/assigned by your campus web application. This value is posted only if it was initially passed to uPay from the campus web application.
	UPAY_SITE_ID = 4	A unique ID that identifies the uPay site. Assigned when the uPay site was created.
	sys_tracking_id = 1234	An internal Marketplace identifier (also known as the order ID) that is also displayed to the customer on the uPay receipt page.
	recurring_payment_type = setup	This value is specified if the payment is a recurring payment. Two values are possible: "setup" (for the initial setup of a recurring payment plan) and "payment" (for one payment in a recurring payment plan).
	recurring_setup_number_of_payments = 2	This value is specified for recurring payment plans and indicates the total number of payments in the plan.
	recurring_setup_start_date = 11/17/2008	This value is specified for recurring payment plans and indicates the date of the first payment in the plan.
	recurring_setup_end_date = 11/24/2008	This value is specified for recurring payment plans and indicates the date when the payment plan ends. If this date does not coincide with a scheduled payment date (as determined by the selected frequency and start date), the final payment will be the last regularly scheduled payment date before the "recurring_setup_end_date"
	recurring_setup_frequency = 4	This numerical value is specified for recurring payment plans and indicates the frequency of payments: 4 = weekly, 1 = monthly, 2 = bi-monthly, 5 = quarterly, 6 = semi-annually, and 7 = annually.

Transaction	Parameters (and Examples)	Description
Cancel	posting_key = [key-goes-here]	A security value specified when the uPay site was built. (See "Miscellaneous: Links, URLs, and E-mail" on page 229.)
	pmt_status = cancelled	This value is always "cancelled."
	EXT_TRANS_ID = 23423424	A unique ID generated/assigned by your campus web application. This value is posted only if it was initially passed to uPay from the campus web application.
	UPAY_SITE_ID = 4	A unique ID that identifies the uPay site. Assigned when the uPay site was created.

For recurring payment plans, the following parameters are passed when the payment plan is established and for each payment:

- sys_tracking_id
- posting_key
- name_on_acct
- acct_addr
- acct_city
- acct_state
- acct_zip
- card_type
- pmt_amt
- recurring_payment_type
- recurring_setup_number_of_payments
- recurring_setup_start_date
- recurring_setup_end_date
- recurring_setup_frequency

Note: During plan setup, the total amount of all payments in the plan is passed to the posting URLas the pmt_amt parameter. This is the same parameter used for each recurring payment in the plan. The campus web application must be able to use the value passed to the posting URL in the recurring_payment_type parameter (either "setup" or "payment") to determine if pmt_amt represents a total for a plan setup or the amount for an individual recurring payment.

And the following additional parameters are passed for each payment in a recurring payment plan (not when the plan is established):

- pmt_status
- pmt_date

- tpg_trans_id

11.6   Bringing Your uPay Site Online

After you have created a uPay site and (if applicable) linked to the site from a campus application, you will need to bring the uPay site online.

Note: To bring a uPay site online, you must be either the merchant manager over that uPay site or one of its site managers.

Follow these steps to bring a uPay site online:

1   Navigate to Marketplace Home > [merchant name] > uPay Sites > [uPay site name] > Miscellaneous.

2   Choose ONLINE from the uPay Site Status dropdown menu.

3   Click the Save button.

After you have completed these steps, your uPay site is live and can start receiving payments. We recommend you test the site first. You should contact the administrator of the campus web application and coordinate a test plan to ensure that transaction parameters are being correctly passed.

12.0 Managing a uPay Site

In this section, we'll review the ways you can update your uPay site and the ongoing tasks you may need to do as a uPay Site Manager.

12.1   Changing uPay Site Features

A uPay site's merchant manager or any of its site managers can update settings for the uPay site. To update settings for a uPay site, click the site's name on the Marketplace home page. The Control Menu will display the settings pages for the site.

The Operations Center pages for uPay settings are the same pages used for setting up the site. For complete uPay settings details, see the page descriptions in the previous section, "Building a uPay Site" on page 219.

For every uPay site, you can change features in:

- **Layout Selection—**Change the site name or layout. (See "Site Name and Layout" on page 221.)

- **Payment Settings—**Change required payment and amount configuration. (See "Payment Settings" on page 222.)

- **Recurring Settings—**Change settings for recurring payments. (See "Recurring Payments" on page 227.)

- **Miscellaneous—**Change navigation, privacy, and e-mail contact information. Also, take the site offline or bring it online. (See "Miscellaneous: Links, URLs, and E-mail" on page 229.)

- **Messages and Titles—**Change message text in your pages. (See "Messages and Titles" on page 233.)

- **Image Management—**Upload new site images. (See "uPay Site Images" on page 240.)

12.2   Adding or Changing Site Managers

To add or change uPay site managers, you must either be the merchant manager over that uPay site or be one of its site managers. You can add an additional manager to a uPay site or remove a manager from a uPay site.

The first uPay site manager was selected or added when the uPay site was created. Each uPay site can have multiple site managers. To change the site managers for an existing store, follow these steps.

1 In the Control Menu, navigate to Marketplace Home > [Merchant Name] > Users.

2 If you see the name of the user you want to manage, click that user's Edit User link. Otherwise, click the View All Users link, then locate and click the Edit User link.

3 To remove the user as a site manager, click the uPay site's checkbox in the left-hand column. To add the user as a site manager, click the uPay site's checkbox in the right-hand column.

Note: You can add and remove uPay sites simultaneously. Click as many boxes in the left and right-hand columns as you need.

Note: You will see only the sites for which you are the Merchant Manager or the Site Manager.

4 Click the Save Changes button.

The following example shows that the user is currently managing three stores (Campus Books, Campus Events, and Campus Wear) and one uPay site (Donations).

Example of editing a user to add a uPay site for management

Changing Store and uPay Site Manager User Roles

Use the following steps to edit user roles for store managers and uPay site managers.

Note: Only merchant managers can edit these roles.

1 From the Control Menu, navigate to Marketplace Home > [merchant] > Users. The Marketplace Merchant User Settings screen appears.

Merchant Users by Role

Click the user's name to send an e-mail. Click Edit User to change the user's access to stores or uPay sites.

[Add User] [View All Marketplace Users]

Merchant Managers

Full Name	Username	Action
Gary Johnson	gjohnson	Edit User

Store Managers

Full Name	Username	Action
Campus Books		
Gary Johnson	gjohnson	Edit User
Campus Events		
Gary Johnson	gjohnson	Edit User
Campus Wear		
Gary Johnson	gjohnson	Edit User

UPay Site Managers

No UPay Sites.

Full Name	Username	Action

2 To edit the roles of a user, click the Edit User link to the right of the user's name. The Edit User page appears.

3 To remove a role, click the Remove check box for that role. To add a role, click the Add checkbox for that role.

4 Click the Save Changes button.

12.3 Taking Your uPay Site Offline

If you need to remove your uPay site from active status, you can change its status to offline. Once the status is changed to offline, the uPay site will no longer accept payments.

Note: To take a uPay site offline, you must be either the merchant manager over that uPay site or one of its site managers.

Follow these steps to take a uPay site offline:

1 Navigate to Marketplace Home > [merchant name] > uPay Sites > [uPay site name] > Miscellaneous.

2 Choose OFFLINE from the uPay Site Status dropdown menu.

3 Click the Save button.

12.4   Deleting a uPay Site

You can delete uPay sites; however, you cannot delete a uPay site if any outstanding payments exist. If there are outstanding payments, you should take the uPay Site offline so customers cannot use the site.

Note: To delete a uPay site, you must be either the merchant manager over that uPay site or one of its Site Managers.

Follow these steps to delete a uPay site:

1   Navigate to Marketplace Home > [merchant name] > uPay Sites > [uPay site name] > Miscellaneous.

2   Click the Delete uPay Site button. A confirm window appears.

3   Click OK to confirm deletion of the uPay site.

12.5   Payment Search, Refunds, and Cancellations

A uPay site manager or the merchant manager for the uPay site can look up records of submitted payments.

Options to refund payments or cancel upcoming recurring payments are available in the payment record details.

Users who make recurring payments are prompted for contact information. If you need to contact a user, you can use Payment Search to look up any e-mail address or phone number the user may have entered.

To navigate to Payment Search, go to Marketplace Home > [merchant name] > uPay Sites > [uPay site name] > Payment Search.

▼ **Marketplace Home**
  ▶ **System Administration**
  ▶ **Alumni**
  ▶ **Athletic Department**
  ▼ **Campus Stuff**
      Settings
      Accounting Codes
      Users
    ▶ **Stores**
    ▼ **uPay Sites**
        Add uPay Site
      ▼ **Donations**
          Layout Selection
          Image Management
          Payment Settings
          Messages & Titles
          Form Parameters
          Miscellaneous
          Recurring Settings
          ▪ **Payment Search**
  ▶ **College Merchant**
  ▶ **Continuing Education**
  ▶ **Parking**
  ▶ **Marketplace Reports**
      Edit My Profile
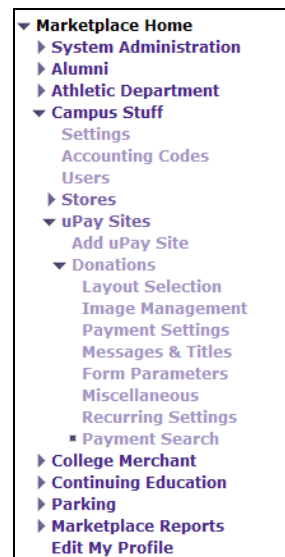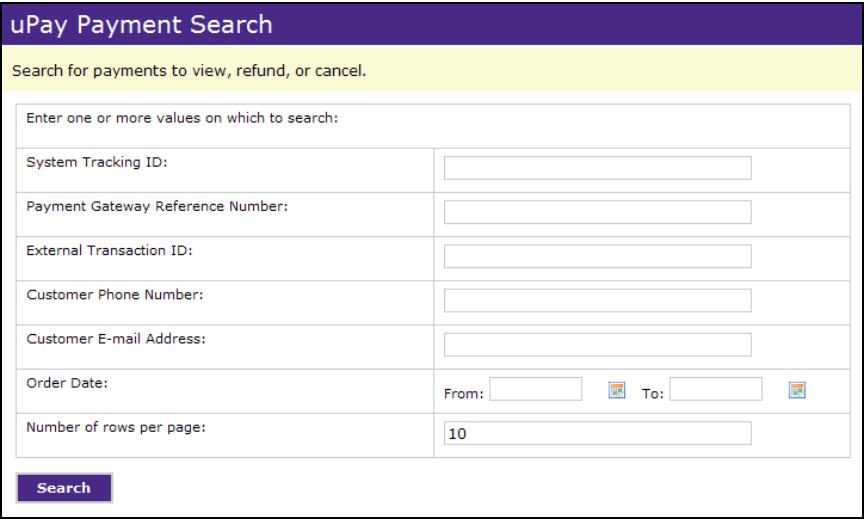
Look Up a Payment

To look up a payment, enter one or more search criteria on the Payment Search page.

If a user has asked you to refund or cancel a payment, the search criteria listed below were printed on the user's receipt. If you don't know specific search criteria, search by date.

Searches by date are the most likely to return multiple records which you can review and select from. In searches by date, you can enter:

- the year, or

- the year and month, or

- the year, month, and day.

You can determine the maximum number of transactions (10 is the default) that will appear on each result page by using the "Number of rows per page" field.

uPay Payment Search

Search for payments to view, refund, or cancel.

Enter one or more values on which to search:

System Tracking ID:	
Payment Gateway Reference Number:	
External Transaction ID:	
Customer Phone Number:	
Customer E-mail Address:	
Order Date:	From: ☐ To: ☐
Number of rows per page:	10

Search

The uPay Payment Search page provides several ways to search for payments.

The payment search returns records of any payments made that fit all the search criteria you entered.

Click the system tracking ID to see more detailed information about the payment, or to refund or cancel it.

System Tracking ID	Order Date	Customer Name	Customer E-Mail Address	External Transaction ID	Amount	Payment Method Name
8	11/06/2008, 10:10:00 AM	Ron Stillwagon	rstillwagon@touchnet.com		25.00	Visa
9	11/07/2008, 11:43:44 AM	R Trujillo	rtrujillo@touchnet.com		6,000.00	Visa
10	11/11/2008, 03:55:37 PM	Aaron	aaron.wadle@touchnet.com		100.00	Visa
19	12/11/2008, 10:39:52 AM	John Doe	gjohnson@touchnet.com		250.00	Visa
20	12/11/2008, 10:49:11 AM	John Doe	gjohnson@touchnet.com		688.00	Visa

Results of a payment order search

Reviewing Payment Details

The Payment Details view includes a top "Order Details" section, a middle "Pending Payments" section, and a bottom "Completed Payments" section.

Payment Details

Click a Refund link to refund the full payment amount. For recurring payment installments, click a Cancel link to cancel an upcoming installment.

Search Results

Order Details

System Tracking ID:	19
Order Date:	12/11/2008, 10:39:52 AM
Customer:	John Doe NA NA, NA USA gjohnson@touchnet.com
Payment Method:	Credit Card : Visa

Pending Payments

☐ Select All	Date	Status	Amount
☐	12/11/2009, 12:00:00 AM	Not Processed	$250.00
☐	12/11/2010, 12:00:00 AM	Not Processed	$250.00
☐	12/11/2011, 12:00:00 AM	Not Processed	$250.00
☐	12/11/2012, 12:00:00 AM	Not Processed	$250.00

Cancel Payment

Completed Payments

Date	Status	TPG Reference Number	Original Amount	Remaining Balance	Action
12/11/2008, 10:49:50 AM	Success	20081211000003	$250.00	$250.00	Refund

The Payment Details page shows completed payments, as well as pending payments, for the specified time period.

One-time pending payments are shown on a single line in the "Pending Payment" section. However, recurring pending payments are shown on multiple lines—one line for each payment to be made. For recurring payments, the "Payment Date" entry in the Details section indicates when the recurring payments were set up. The first payment may have been scheduled to occur after that date.
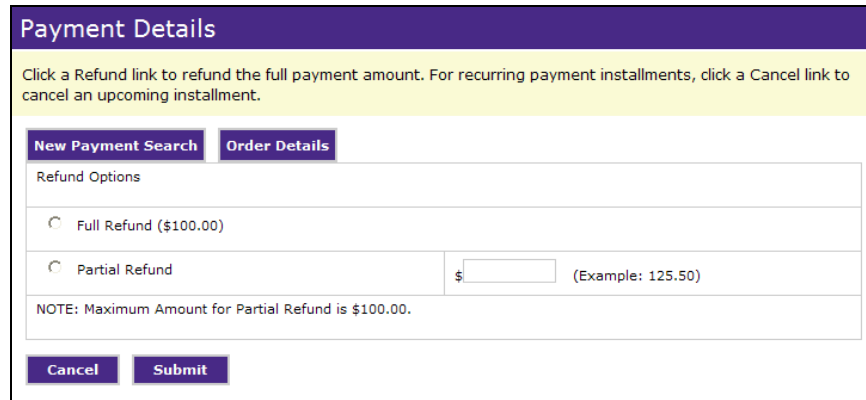
Refund a Payment

If the payment has been processed and has not already been refunded, its detailed record will include a Refund link. You can process refunds either for credit card payments or ACH payments.

To refund a payment:

1 Navigate to Marketplace Home > [merchant name] > uPay Sites > [uPay site name] > Payment Search.

2 Search for the payment to refund (as described in "Look Up a Payment" on page 267).

3 In the search results, click the payment's system tracking ID. The Payment Details page appears.

4 Click the Refund link of the corresponding completed payment.

he Refund Options pop-up window appears.

Payment Details

Click a Refund link to refund the full payment amount. For recurring payment installments, click a Cancel link to cancel an upcoming installment.

New Payment Search	Order Details

Refund Options

○ Full Refund ($100.00)

○ Partial Refund $ [_____] (Example: 125.50)

NOTE: Maximum Amount for Partial Refund is $100.00.

Cancel	Submit

For recurring payments, the following dialog window appears.

Windows Internet Explorer

You are about to refund a upay recurring payment installment. Note that this amount will be refunded in its entirety. Do you wish to continue?

OK	Cancel

Note: You cannot make a partial refund of a uPay recurring payment installment. Only full refunds are available for recurring payments.

5 For one-time payments, select either partial or full refund, enter a refund amount, and then click Submit.

For recurring payments, select OK to refund the payment in its entirety.

Note: Payment refunds are processed through TouchNet Payment Gateway. When you set up your Marketplace Merchant, you associated it with a host system account. In Payment Gateway, this host system account is linked to a bank account. So when you process a refund, the money flows from that bank account back to the user's account.

Cancel an Upcoming Payment

For recurring payments, the payment record shows each upcoming payment. These payments have not yet been processed, and their records will include a Cancel link.

To cancel a payment:

1   Navigate to Marketplace Home > [merchant name] > uPay Sites > [uPay site name] > Payment Search.

2   Search for the payment to refund (as described in "Look Up a Payment" on page 267).

3   In search results, click the payment's system tracking ID. The Payment Details page appears.

4   Select the corresponding checkbox for each pending payment that you need to cancel.

5   Click the Cancel Payment button.

Payment Details

Click a Refund link to refund the full payment amount. For recurring payment installments, click a Cancel link to cancel an upcoming installment.

Search Results

Order Details

System Tracking ID:	19
Order Date:	12/11/2008, 10:39:52 AM
Customer:	John Doe NA NA, NA USA gjohnson@touchnet.com
Payment Method:	Credit Card : Visa

Pending Payments

Select All	Date	Status	Amount
☐	12/11/2009, 12:00:00 AM	Not Processed	$250.00
☐	12/11/2010, 12:00:00 AM	Not Processed	$250.00
☐	12/11/2011, 12:00:00 AM	Not Processed	$250.00
☐	12/11/2012, 12:00:00 AM	Not Processed	$250.00

Cancel Payment

Payment details showing a recurring payment, with individual, future payments that can be cancelled.

Note: uPay does not allow any changes to be made to the customer's payment information. However, a uPay site manager can cancel specific pending payments for a customer's payment plan. Therefore, if a customer would like to make changes to the payment information for an existing recurring payment plan (e.g. entering a new credit card number), the uPay site manager can offer the following alternative to the customer: 1) the uPay site manager can cancel all remaining payments in a payment plan, and 2) the customer can create a new payment plan, using the new payment information.

13.0 Automatic E-mail Messages

After a customer enters payment information at a uPay site for a one-time payment, the customer receives a notification-of-payment e-mail message. Likewise, after a recurring payment is established, the customer receives an e-mail message after each subsequent payment takes place . The notification message for one-time payments is not editable. The notification message for recurring payments is editable.

13.1 Examples of E-mail Messages

Here is an example of a notification message for a one-time payment:

```
This is an automated message to inform you that your
payment has been completed successfully. Payment details
are listed below. Please note that all payments are subject
to approval and final verification.


======== PAYMENT DETAILS ========
Name: John Doe
Payment Type: Visa
Credit Card Number: xxxxxxxxxxxx1111
Credit Card Authorization Code: 141446
Credit Card Merchant Id: XXXYYYZZZ
*** Card Not Present ***
Total Paid: $ 100.00
Date/Time: 01/13/2009 at 14:14:46 CST
System Tracking ID: 31
Payment Gateway Reference Number: 20090113000001
 ===============================
Thank you,
Donations
```

Here is an example of a notification message for a recurring payment:

```
Hello,

This is an automated message to inform you that your
scheduled payment has been completed successfully. Payment
details are listed below. Please note that all payments are
subject to approval and final verification.

======== PAYMENT DETAILS ========
Customer Name --- John Doe
Payment Date --- 2008-12-30 01:20:08
```

```
Amount --- $330.00
Payment Method --- MasterCard
Payment Gateway Reference Number --- 53565635656
System Tracking ID --- 1113
=================================

Sincerely,
University Billing Department
```

13.2   Editing E-mail Messages

The notification message for one-time payments is not editable. The
notification message for recurring payments is editable.

Editing Recurring Payment E-mail Messages

In addition to editing the three types of e-mail messages described above,
you can also edit the recurring payment e-mail messages. However, these
messages can only be changed by directly editing the template files. These
files can be found in the following location:
\touchnet\marketplace50\sys\tmsrecur. Look for the following three files:

- *success_template.txt*—This file is used when all d

- *failure_template.txt*—

- *error_notification_template.txt*—

Note: If these files need to be edited, you should contact your Marketplace
administrator. These files cannot be edited with Marketplace Operations
Center.

Here is an example of the *success_template.txt* file.

```
Hello,


This is an automated message to inform you that your
scheduled payment has been completed successfully. Payment
details are listed below. Please note that all payments are
subject to approval and final verification.

======== PAYMENT DETAILS ========
Customer Name --- {{/TOUCHNET/PAYMENT_METHOD/
ADDRESS[@TYPE='billing']/NAME}}
Payment Date --- {{__DATE__}}
```

```
Amount --- {{__AMOUNT__}}
Payment Method --- {{/TOUCHNET/PAYMENT_METHOD/
HSA_PMT_METH_NAME}}
Payment Gateway Reference Number ---
{{__REFERENCE_NUMBER__}}
System Tracking ID --- {{__ORDER_ID__}}
================================

Sincerely,
University Billing Department
```

You can edit any character in the template except for the value declarations in double curly brackets {{ }}. In a similar fashion, you can also edit the *failure_template.txt* and *error_notification.txt*.

Important! Be sure not to edit the value declarations in double curly brackets or you may disable e-mail messages for recurring payments.

13.3 uPay E-mail Addresses

The e-mail addresses that will used as the "from" addresses for Marketplace uPay e-mail messages depend on the types of e-mail messages being generated. The following table describes each type of Marketplace uPay e-mail message and defines which e-mail addresses are used.

This message type ...	Uses this e-mail address in the "from" field
One-time payment confirmation	The e-mail address entered in the ."Site Manager's E-mail Address" field on the uPay site's Miscellaneous Settings page. If no e-mail address is entered in the "Site Manager's E-mail Address" field, then the e-mail address named in the uPay *critical.prp* file will be used. (The e-mail address in the *critical.prp* file was named when Marketplace was set up. If this address must be changed, you should contact your Marketplace administrator.)
Recurring payment confirmation	The e-mail address named in the AliveCheck.mail.from field of the *tmsrecur.prp* file.

About Recurring Payments Announcements

All recurring payment confirmations for all Marketplace merchants—for both uStores and uPay—use the same "from" e-mail address. This e-mail address can be configured with the AliveCheck.mail.from field in the *tmsrecur.prp* file.

Part 5:

General Ledger Information

14.0 General Ledger Information

When general ledger functionality is enabled, fields become available in the Marketplace Operations Center for establishing accounting codes. These codes can be linked to stores, products, tax rates, shipping rates, and uPay sites. During the fulfillment process, the accounting code values can be communicated to your general ledger system.

This section describes how to use the Marketplace Operations Center to set up accounting codes, turn on general ledger functionality, and link accounting codes to various Marketplace purposes.

Because Marketplace can be integrated with Banner and PeopleSoft, additional setup information is provided for using the Marketplace Operations Center to establish general ledger integration for Banner and PeopleSoft.

General Ledger Integration for Banner

If your institution uses the Sungard Higher Education Banner system, you can integrate its general ledger functionality with TouchNet Marketplace. When general ledger functionality is used with Marketplace, Banner detail codes can be established and associated with Marketplace stores, uPay sites, products, tax rates, and shipping rates.

When general ledger functionality is enabled, fields become available in the Marketplace Operations Center for entering Banner detail codes and cashier IDs. These values become linked to Marketplace accounting codes and transactions. During the fulfillment process, the Banner detail codes are communicated to the Banner database for use in its general ledger module.

Integration of Banner and Marketplace involves the following actions: 1) configuring Payment Gateway, 2) editing Marketplace properties files, and 3) configuring Marketplace for using Banner general ledger functionality. Only the third action is covered in the Marketplace 5.0 User Guide. The first two actions are covered in the following guide: "Banner Setup Guide for Marketplace."

General Ledger Integration for PeopleSoft

If your institution uses PeopleSoft Enterprise software, you can integrate its general ledger functionality with TouchNet Marketplace. This integration allows general ledger codes to be established and associated with Marketplace stores, products, tax rates, shipping rates, and uPay sites.

Integration of PeopleSoft and Marketplace involves the following actions: 1) installing the TouchNet Lockbox and the PSGL Validator, 2) determining the flat file ledger format for PeopleSoft import files, 3) editing the Lockbox files to meet the output needs of your institution, 4) creating data files in CSV format that include the PeopleSoft general ledger codes, 5) configuring Payment Gateway, 6) editing Marketplace properties files, and 7)

configuring Marketplace for using PeopleSoft general ledger functionality. Only the final action is covered in the Marketplace 5.0 User Guide. The preceding actions are covered in the following guide: "PeopleSoft Setup Guide for Marketplace."

When general ledger functionality is enabled, fields become available in the Marketplace Operations Center for entering PeopleSoft general ledger codes. These values become linked to Marketplace accounting codes and transactions. During the fulfillment process, the PeopleSoft general ledger codes are saved by Marketplace in an output file during the fulfillment process. This flat file ledger can be imported into PeopleSoft.

14.1   About Accounting Codes

Marketplace accounting codes are typically tied to one or more general ledger codes from your school's general ledger system. These accounting codes represent products, donations, shipping rates, tax revenue, and uPay transactions. When Marketplace stores or uPay sites use general ledger functionality, the associated general ledger codes are saved during the fulfillment process, allowing your general ledger system to keep track of Marketplace revenue.

Before an accounting code can be established, you must ensure the appropriate general ledger codes have been created. Contact your general ledger system administrator for information about the allowable general ledger codes. Likewise, you should contact the general ledger system administrator if a new general ledger code is required.

Who Creates Accounting codes?

Accounting codes are created by administrators and merchant managers. Administrators create "common accounting codes," which are available for all merchants to use (see "Configuring System Administration Settings" on page 288), and merchant managers create merchant-level accounting codes, which are only available for the merchants who created the codes (see "Configuring Merchant Settings" on page 294).

Common accounting codes are typically assigned to tax classes (see "Configuring System Administration Settings" on page 288). Your institution may use common accounting codes for other purposes as well.

Before a store or uPay site can use a common accounting code, the code must first be "enabled" by a merchant manager (see "Configuring Merchant Settings" on page 294).

Accounting codes are established by merchant managers for four reasons:

- To serve as the default accounting code used by a store (see "Configuring Store Settings" on page 298),

- To serve as the accounting code used by one or more uPay sites (see "Configuring uPay Settings" on page 301),

- To serve as an override accounting code used by one or more products in a store (see "Configuring Store Settings" on page 298), and

- To serve as an override accounting code assigned to a delivery method in a shipping class (see "Configuring Store Settings" on page 298).

You will only see accounting code fields when setting up a product if general ledger features are enabled.

About Banner Detail Codes

Marketplace accounting codes are tied to Banner detail codes. When Marketplace stores or uPay sites use general ledger functionality, the associated Banner detail codes are passed to your Banner general ledger system during the fulfillment process, allowing Banner to keep track of Marketplace revenue.

Marketplace accounting codes are created by administrators and merchant managers. Each accounting code is associated with a Banner detail code (which must come from a list of approved detail codes prepared by your institution's Banner administrator). During the Marketplace fulfillment process, the detail code is passed to your Banner system.

A Marketplace merchant manager must turn on general ledger functionality (see "Configuring Store Settings" on page 298) before Banner detail codes can be associated with the transactions generated by a merchant's store or uPay site.

Important! Before a Marketplace accounting code can be established you must ensure a Banner detail code has been created that can be associated with the accounting code. Contact your Banner administrator for a list of the approved detail codes. Likewise, contact the Banner administrator if a new detail code is required.

About PeopleSoft Accounting Codes

Each Marketplace accounting code is associated with multiple PeopleSoft general ledger codes. The allowable general ledger codes are determined by the CSV data files used when PeopleSoft integration is established (or updated). For more information about the CSV data files, see the following guide "PeopleSoft Setup Guide for Marketplace."

For each Marketplace accounting code, entries are required in the Marketplace Operations Center for the following PeopleSoft general ledger codes:

- business unit

- fund

- department

- account

- class

- project

The values entered for these general ledger codes are validated against the values in the CSV data files. Therefore, administrators and merchant managers must be provided with information about the allowable general ledger codes.

Note: An additional field is available for a general ledger code called "program"; however, this field is not validated by Marketplace and therefore is not required when you establish Marketplace accounting codes.

Note: If you get an error message while entering an accounting code in the Marketplace Operations Center, you should verify that the accounting code was included in the CSV files.

Important! Before an accounting code can be established, you must ensure the appropriate PeopleSoft general ledger codes have been created for associating with the new accounting code. Contact your PeopleSoft Enterprise administrator for information about the allowable general ledger codes. Likewise, contact the PeopleSoft Enterprise administrator if a new general ledger code is required.

14.2   About Cashier IDs (Banner only)

The Banner general ledger system uses cashier IDs. These IDs can be used for identifying Marketplace transactions to Banner.

A default cashier ID is assigned by the Marketplace administrator (see "Configuring System Administration Settings" on page 288) and can apply to all the Marketplace stores. However, each store can also have its own cashier ID. If a merchant manager assigns a cashier ID to a store (see

"Configuring Store Settings" on page 298), this value overrides the default cashier ID.

You should contact your Banner administrator for information about how cashier IDs should be used.

15.0 Configuring General Ledger Integration

General ledger integration typically involves configuring Payment Gateway and editing Marketplace properties files. In addition, general ledger integration requires using Marketplace Operations Center to establish accounting codes and configure various settings.

Note: The integration steps for configuring Payment Gateway and editing Marketplace properties files are described in general-ledger-specific support references. Banner customers should use the following guide: "Banner Setup Guide for Marketplace." PeopleSoft customers should use the following guide: "PeopleSoft Setup Guide for Marketplace." Only the configuration steps that involve using Marketplace Operations Center are described in the following sections.

Steps for General Ledger Integration

The following steps describe how to use the Marketplace Operations Center to establish general ledger integration. These steps can only be performed after Payment Gateway has been configured and Marketplace properties files have been edited.

1   A Marketplace administrator creates common accounting codes, typically used for tax classes. See "Configuring System Administration Settings" on page 288.

2   A Marketplace administrator assigns a common accounting code to each tax class. See "Configuration Setting: Establishing Tax Account Codes" on page 289.

   Note: Banner users must also enter a default cashier ID for use by all Marketplace stores. See "Configuration Setting for Banner: Enter a Default Cashier ID" on page 290.

3   If applicable, a merchant manager selects which common accounting codes will be used by the associated merchant. See "Configuration Setting: Enabling Common Accounting Codes" on page 294

4   For each Marketplace merchant, a merchant manager adds new accounting codes. These codes include 1) store default accounting codes, 2) uPay site accounting codes, 3) override accounting codes to be used by products, and 4) override accounting codes for delivery methods. See "Configuring Merchant Settings" on page 294.

5   For each Marketplace store and uPay site, a merchant manager turns on general ledger functionality and selects the default accounting code for the store. See "Configuring Merchant Settings" on page 294 and "Configuring uPay Settings" on page 301.

6 For each Marketplace store, a store manager assigns override accounting codes to products. See "Configuration Setting: Selecting an Accounting Code Override" on page 299.

7 For each Marketplace store, a store manager assigns override accounting codes to delivery methods. See "Configuration Setting: Establishing Shipping Rates" on page 299.

Note: Banner users can also enter a cashier ID for each store. See "Banner Stores Settings" on page 300.

15.1 Configuring System Administration Settings

In the system administration settings of the Marketplace Operations Center, a Marketplace administrator can create and edit accounting codes that will be available for all the stores to use. These accounting codes are called "common" accounting codes. In the system administration settings, a Marketplace administrator can also assign accounting codes to tax classes.

Note: In addition to the system administration settings described below, Banner customers must also enter a default cashier ID. See "Configuration Setting for Banner: Enter a Default Cashier ID" on page 290

Here are descriptions of how to change the system administration settings that affect general ledger functionality.

CONFIGURATION SETTING: Adding Common Accounting Codes
DESCRIPTION: Marketplace administrators can set up common accounting codes for use by Marketplace stores.

Control Menu Navigation: Marketplace Home > System Administration > Settings > Accounting Codes.

Page: Displays the uStores Common Accounting Codes page.

CONFIGURATION SETTING: Adding Common Accounting Codes
DESCRIPTION: Marketplace administrators can set up common accounting codes for use by Marketplace stores.

Actions: The uStores Common Accounting Codes page lists all the common accounting codes that have currently been established.

To add a new accounting code, select the Add New Common Accounting Code link, which displays the Add New Common Accounting Code page (see the screen capture below).

Note: The Add New Common Accounting Code page contains additional fields if general ledger functionality for Banner or PeopleSoft has been activated. Banner customers should view "Configuration Setting for Banner: Adding Common Accounting Codes" on page 291, and PeopleSoft customers should view "Configuration Setting for PeopleSoft: Adding Common Accounting Codes" on page 293.

When you establish a common accounting code, you must give it a name. Enter the name in the New Accounting Code Name field (25 characters maximum). The name you assign must be unique. Names already used are displayed in the lower half of the Add New Common Accounting Code page.

Add New Common Accounting Code

Account Code: _____

New Accounting Code Name: _____

[Add]

Note: Accounting code names must be unique (case-insensitive). Listed below are the names already in use.
- Acct Code 1
- Acct Test
- Marketing
- Testing
- Tuition

CONFIGURATION SETTING: Establishing Tax Account Codes
DESCRIPTION: Marketplace administrators can link accounting codes to tax classes, and these tax classes can be used for all Marketplace stores.

Control Menu Navigation: Marketplace Home > System Administration > Settings > Tax Account Codes.

Page: Displays the uStores Tax Account Codes page.

CONFIGURATION SETTING: Establishing Tax Account Codes
DESCRIPTION: Marketplace administrators can link accounting codes to tax classes, and these tax classes can be used for all Marketplace stores.

Actions: This page lists three tax classes: no tax, default tax rate, and higher tax rate.

You can assign an accounting code to each tax class by choosing from the Accounting Code dropdown menus.

uStores Tax Account Codes

If you use general ledger (GL) integration, select an accounting code for each tax class.

Tax Class Id	Tax Class Name	Accounting Code
0	no tax	Tax
1	default tax rate	Tax
2	higher tax rate	Tax

Save   **Reset**

If no accounting codes are assigned to the tax classes, then each store reports tax revenue using its own default accounting code.

Banner System Administration Settings

For Banner customers, some of the Marketplaces Operations Center pages are customized for Banner integration. As a result, the field name Banner Detail Code replaces some instances of Accounting Code. In addition, fields for recording cashier ID values also appear.

The following tables describe those system administration settings which affect only Banner integration.

CONFIGURATION SETTING FOR BANNER: Enter a Default Cashier ID
DESCRIPTION: Marketplace administrators can set up a default cashier ID available for all Marketplace stores.

Control Menu: Marketplace Home > System Administration > Settings > General.

Page: Displays the General System Settings page.

<table>
<tr><td>

CONFIGURATION SETTING FOR BANNER: Enter a Default Cashier ID
DESCRIPTION: Marketplace administrators can set up a default cashier ID available for all Marketplace stores.

</td></tr>
<tr><td>

Actions: Look for the Default Cashier ID field. Enter a code (30 characters maximum) in this field. This value will be passed to Banner and can be used to help identify the Marketplace store from which a transaction originated.

Default Cashier ID:	CASHIER

</td></tr>
</table>

<table>
<tr><td>

CONFIGURATION SETTING FOR BANNER: Adding Common Accounting Codes
DESCRIPTION: Marketplace administrators can set up common accounting codes for use by Marketplace stores.

</td></tr>
<tr><td>

Control Menu: Marketplace Home > System Administration > Settings > Accounting Codes.

</td></tr>
<tr><td>

Page: Displays the uStores Common Accounting Codes page.

</td></tr>
</table>

**CONFIGURATION SETTING FOR BANNER: Adding Common Accounting Codes
DESCRIPTION: Marketplace administrators can set up common accounting
codes for use by Marketplace stores.**

Actions: The uStores Common Accounting Codes page lists all the common
accounting codes that have currently been established for use by Marketplace
stores.

To add a new accounting code, select the Add New Common Accounting Code
link, which displays the Add New Common Accounting Code page (see the
screen capture below). Enter an approved Banner detail code in the Banner
Detail Code field. (You will need to contact your institution's Banner
administrator for a list of the approved detail codes.) Enter a name for this code
in the New Accounting Code Name field (25 characters maximum). The name
you assign must be unique. Names already used are displayed in the lower half
of the Add New Common Accounting Code page.

Add New Common Accounting Code

Accounting code names must be unique (case-insensitive). Listed below are the names already in use.

Back To uStores Common Accounting Codes

Banner Detail Code:	
New Accounting Code Name:	

Add

Current Accounting Code Names In Use

College_Digital Downloads
GL_College Marketplace
Tax

PeopleSoft
System
Administration
Settings

For PeopleSoft customers, the Marketplace Operations Center pages for
adding new accounting codes have been customized so that multiple
PeopleSoft general ledger codes can be assigned to each accounting code.

The following table describes how to use the system administration settings that affect how PeopleSoft customers create new common accounting codes.

CONFIGURATION SETTING FOR PEOPLESOFT: Adding Common Accounting Codes
DESCRIPTION: Marketplace administrators can set up common accounting codes for use by Marketplace stores.

Control Menu Navigation: Marketplace Home > System Administration > Settings > Accounting Codes.

Page: Displays the uStores Common Accounting Codes page.

Actions: The uStores Common Accounting Codes page lists all the common accounting codes that have currently been established for use by Marketplace stores.

To add a new accounting code, select the Add New Common Accounting Code link, which displays the Add New Common Accounting Code page (see the screen capture below). On this screen, select a business unit from the drop-down menu. Then, enter general ledger codes for fund, department, account, program, class, and project. These general ledger codes work in combination with business unit; therefore, you must be working from a list of acceptable combinations of general ledger codes—as provided by your institution's PeopleSoft administrator.

Note: No validation takes place on the Program field; however, the values entered in the other fields will be validated.

When you establish a common accounting code, you must give it a name. Enter the name in the New Accounting Code Name field (25 characters maximum). The name you assign must be unique. Names already used are displayed in the lower half of the Add New Common Accounting Code page.

15.2   Configuring Merchant Settings

Before a store or uPay site can use a common accounting code, the code must first be "enabled" by the store's merchant manager. In addition to enabling existing common accounting codes, a merchant manager can establish new accounting codes. In contrast to common accounting codes, however, an accounting code established by a merchant manager is available for use only by the merchant who established the code.

CONFIGURATION SETTING: Enabling Common Accounting Codes
DESCRIPTION: A Marketplace merchant manager can select which common accounting codes are available for use by the merchant's stores and uPay sites.

Control Menu Navigation: Marketplace Home > [merchant] > Accounting Codes.

Page: Displays the Marketplace Merchant Accounting Codes page.

Actions: The Marketplace Merchant Accounting Codes page lists the common accounting codes that are available for use by the merchant.

By selecting accounting codes in the selection list box and clicking Add, you can add accounting codes to the Enabled Common Accounting Codes list. Once you enable a common accounting code, it is then available for use by the merchant's stores and uPay sites.

Marketplace Merchant Accounting Codes

Merchant specific accounting codes are available to this Marketplace merchant only. Merchant managers can choose to use any number of the common accounting codes in addition to the specific codes, or none at all.

College_Digital Downloads
GL_College Marketplace
Tax

Add >>

Enabled Common Accounting Codes

Name	In Use?	Actions
None currently enabled.		

Add Accounting Code

Current Accounting Codes

Name	In Use?	Actions	
campus stuff books	No	Edit	Delete

> **CONFIGURATION SETTING: Adding New Accounting Codes**
> **DESCRIPTION: A Marketplace manager can add new accounting codes to be used by the merchant's stores and uPay sites.**

> **Control Menu Navigation**: Marketplace Home > [merchant] > Accounting Codes.

> **Page**: Displays the Marketplace Merchant Accounting Codes page.

> **Actions**: The top portion of the Marketplace Merchant Accounting Codes page (see the screen capture on the previous page) lists the common accounting codes that are available for use by the merchant, while the bottom portion lists all the new accounting codes that have currently been established.
>
> To add a new accounting code, select the Add A New Accounting Code link, which displays the Add A New Accounting Code page (see the screen capture below).
>
> **Note:** This page contains additional fields if general ledger functionality for Banner or PeopleSoft has been activated. Banner customers should view "Configuration Setting for Banner: Add New Accounting codes" on page 296, and PeopleSoft customers should view "Configuration Setting for PeopleSoft: Adding New Accounting Codes" on page 297.
>
> When you establish a new accounting code, you must give it a name. Enter the name in the New Accounting Code Name field (25 characters maximum). The name you assign must be unique. Names already used are displayed in the lower half of the Add A New Common Accounting Code page.

> **Add A New Accounting Code**
>
> Account Code: [   ]
>
> New Accounting Code Name: [   ]
>
> [Add]
>
> Note: Accounting code names must be unique (case-insensitive). Listed below are the names already in use.
> - Acct Code 1
> - Acct Test
> - Marketing
> - Testing
> - Tuition
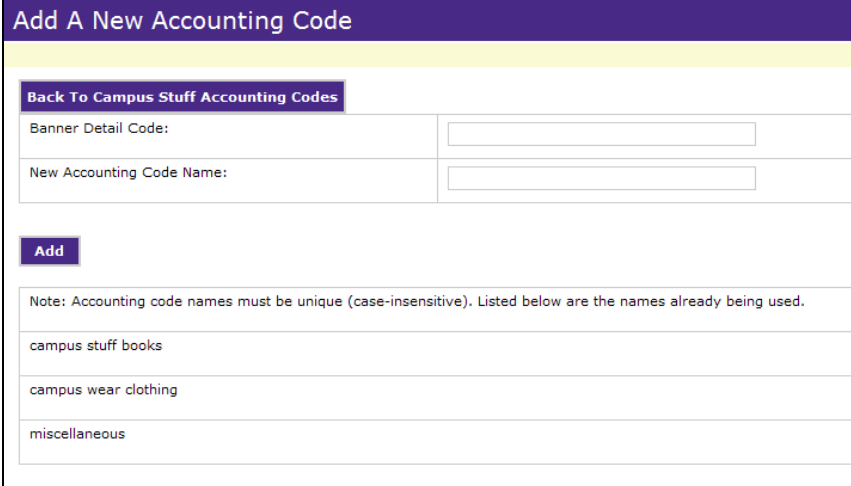
Banner Merchant Settings

For Banner customers, some of the Marketplaces Operations Center pages are customized for Banner integration.

The following table describes those merchant settings which affect Banner integration.

CONFIGURATION SETTING FOR BANNER: Add New Accounting codes DESCRIPTION: A Marketplace manager can add new accounting codes to be used by the merchant's stores and uPay sites and associate these accounting codes with Banner detail codes.

Control Menu: Marketplace Home > [merchant] > Accounting Codes.

Page: Displays the Marketplace Merchant Accounting Codes page.

Actions: The top portion of the Marketplace Merchant Accounting Codes page (see the screen capture on the previous page) lists the common accounting codes that are available for use by the merchant, while the bottom portion lists all the new accounting codes that have currently been established.

To add a new accounting code, select the Add A New Accounting Code link, which displays the Add A New Accounting Code page (see the screen capture below). Enter an approved Banner detail code in the Banner Detail Code field. (You will need to contact your institution's Banner administrator for a list of the approved detail codes.) Enter a name for this code in the New Accounting Code Name field (25 characters maximum). The name you assign must be unique. Names already used are displayed in the lower half of this page.

Add A New Accounting Code

Back To Campus Stuff Accounting Codes

Banner Detail Code: _____

New Accounting Code Name: _____

Add

Note: Accounting code names must be unique (case-insensitive). Listed below are the names already being used.

campus stuff books

campus wear clothing

miscellaneous

PeopleSoft Merchant Settings

For PeopleSoft customers, some of the Marketplaces Operations Center pages are customized for PeopleSoft integration.

The following table describes those merchant settings which affect PeopleSoft integration.

CONFIGURATION SETTING FOR PEOPLESOFT: Adding New Accounting Codes DESCRIPTION: A Marketplace manager can add new accounting codes to be used by a merchant's stores and uPay sites.
Control Menu Navigation: Marketplace Home > [merchant] > Accounting Codes.
Page: Displays the Marketplace Merchant Accounting Codes page.
Actions: The top portion of the Marketplace Merchant Accounting Codes page (see the screen capture on the previous page) lists the common accounting codes that are available for use by the merchant, while the bottom portion lists all the new accounting codes that have currently been established.   To add a new accounting code, select the Add A New Accounting Code link, which displays the Add A New Accounting Code page (see the screen capture below). On this screen, select a business unit from the drop-down menu. Then, enter values for fund, department, account, program, class, and project. These general ledger codes work in combination with business unit; therefore, you must be working from a list of acceptable combinations of general ledger codes—as provided by your institution's PeopleSoft administrator.   **Note:** No validation takes place on the Program field; however, the values entered in the other fields will be validated (and therefore must be valid).   When you establish a new accounting code, you must give it a name. Enter the name in the New Accounting Code Name field (25 characters maximum). The name you assign must be unique. Names already used are displayed in the lower half of the Add New Common Accounting Code page.

15.3 Configuring Store Settings

Before general ledger codes are reported with transactions, a merchant manager must turn on the Perform General Ledger Updates option. This option is located in the store settings. In addition, a merchant manager can select the default accounting code to use with a store.

A store manager can select an accounting code override touse with a product, which if selected, overrides a store's default accounting code. In addition, a store manager can select the accounting code to use with special delivery methods in a shipping class.

CONFIGURATION SETTING: **Turning On General Ledger Functionality**
DESCRIPTION: **A Marketplace merchant manager can turn on general ledger functionality and select a default accounting code to be used for transactions at a store.**

Control Menu Navigation: Marketplace Home > [Merchant] > Store > [Store Name] > Store Settings > General.

Page: Displays the [Store Name] General Settings page.

Actions: To turn on general ledger functionality for a store, select the checkbox for Perform General Ledger Updates.

If you turn on general ledger functionality, you must also select a Default Accounting Code from the dropdown menu. The accounting code you select will be used for all products in a store except those products for which you establish an override accounting code. The accounting codes displayed in the dropdown menu represent both the common accounting codes that have been enabled and the new accounting codes established by a merchant manager.

(The Perform General Ledger Updates checkbox and the Default Accounting Code dropdown menu are not displayed for store managers. Only merchant managers see these fields.)

Cashier ID :	CASHIER
Default Accounting Code:	miscellaneous
E-mail addresses to notify when donations are made:	campus stuff books campus wear clothing miscellaneous

Note: For Banner customers, an additional field appears on the General Settings page. See "Banner Stores Settings" on page 300.

CONFIGURATION SETTING: **Selecting an Accounting Code Override**
DESCRIPTION: **A Marketplace store manager can assign an accounting code override to a product.**

Control Menu Navigation: Marketplace Home > [Merchant] > Store > [Store Name] > Store Settings > Products.

Page: Displays the [Store Name] Product Management page.

Actions: For existing products, use the Jump to Category dropdown menu on the [Store Name] Product Management page to select the category that contains the product you wish to edit. The products for this category are then displayed.

Click a product name to display the associated [Store Name] Product Details page (see the screen capture below). The store's default accounting code will be used unless you have selected an accounting code override. To use an override, select an accounting code from the Accounting Code Override dropdown menu.

Typically, stores will use the same override accounting code for groups of related products. For example, all clothing items or all books might receive the same override account code.

You can also establish an accounting code override when you add a new product. Select the Add a New Product link on the [Store Name] Product Management page, which starts the Add a New Product Wizard. Step 2 of the wizard displays the Accounting Code Override dropdown menu. You can either use the store's default accounting code or select an override code from the Accounting Code Override dropdown menu.

You can also set an accounting code override when importing a product list. For more information, see "Importing Product Lists" on page 148.

Store's Default Accounting Code:	miscellaneous
For this product you may override the default accounting code below.	
Accounting Code Override:	

CONFIGURATION SETTING: **Establishing Shipping Rates**
DESCRIPTION: **A Marketplace store manager can associate an accounting code with a delivery method in a shipping class.**

Control Menu Navigation: Marketplace Home > [Merchant] > Store > [Store Name] > Store Settings > Shipping Rates.

Page: Displays the [Store Name] Shipping Rates page.

CONFIGURATION SETTING: Establishing Shipping Rates
DESCRIPTION: A Marketplace store manager can associate an accounting code with a delivery method in a shipping class.

Actions: The store's default accounting code will be used for each delivery method unless you select an accounting code override on the [Store Name] Shipping Rates page. To select an override for a delivery method, select an accounting code from the Accounting Code Override dropdown menu.

Shipping Class: Regular

DeliveryMethod	Enable?	Base Charge ($)	Per Additional Item Charge ($)	Require Shipping Address?	Allowed Countries	Tax Class	Accounting Code Override
None	☐	0.00	0.00	☑	N/A	default tax rate ▾	▾
Walk-In	☐	0.00	0.00	☑	N/A	default tax rate ▾	▾
US Mail	☑	4.00	2.00	☑	Select Countries	default tax rate ▾	▾
International	☐	0.00	0.00	☑	N/A	default tax rate ▾	▾
UPS	☑	5.00	3.00	☑	Select Countries	default tax rate ▾	▾
FedEx Ground	☑	12.00	5.00	☑	Select Countries	default tax rate ▾	▾

Default Delivery Location:

City:	Lenexa
State:	Kansas ▾
ZipCode:	66219

Save Regular Shipping Class

You can also select a Tax Class for each shipping rate. Tax classes are linked to accounting codes as described in "Configuring System Administration Settings" on page 288.

Banner Stores Settings

For Banner customers, some of the Marketplaces Operations Center pages are customized for Banner integration.

The following table describes those store settings which affect Banner integration.

BANNER CONFIGURATION SETTING: Select Cashier ID for a Store
DESCRIPTION: A Marketplace merchant manager can enter a Cashier ID for a store.

Control Menu: Marketplace Home > [Merchant] > Store > [Store Name] > Store Settings > General.

Page: Displays the [Store Name] General Settings page.

> **BANNER CONFIGURATION SETTING: Select Cashier ID for a Store**
> **DESCRIPTION: A Marketplace merchant manager can enter a Cashier ID for a store.**
>
> **Actions**: Enter a cashier ID in the Cashier ID field. The value you enter in this field overrides the cashier ID you entered on the System Administration General Settings page.

Perform General Ledger Updates:	☑ (if checked, accounting code entry is required)
Cashier ID :	CASHIER
Default Accounting Code:	miscellaneous ▼
E-mail addresses to notify when donations are made:	campus stuff books campus wear clothing miscellaneous

15.4   Configuring uPay Settings

In order for general ledger codes to be reported with uPay transactions, a merchant manager must turn on the Perform General Ledger Updates option. This option is located in the payment settings for each uPay site. Once this option is selected for a uPay site, an accounting code must be chosen for the site. (Banner customers must also enter a cashier ID.) The accounting codeis then reported (as well as, for Banner customers, the cashier ID) with each uPay site transaction that takes place.

> **CONFIGURATION SETTING: Selecting a uPay Site Accounting Code**
> **DESCRIPTION: A Marketplace merchant manager can turn on general ledger functionality and select an accounting code to be used for all transactions at a uPay site.**
>
> **Control Menu Navigation**: Marketplace Home > [Merchant] > uPay Sites > [uPay Site Name] > Payment Settings.
>
> **Page**: Displays the [uPay Site] Payment Settings page.

CONFIGURATION SETTING: Selecting a uPay Site Accounting Code
DESCRIPTION: A Marketplace merchant manager can turn on general ledger functionality and select an accounting code to be used for all transactions at a uPay site.

Actions: To turn on general ledger functionality for a uPay site, select the Yes button for Perform General Ledger Updates. If you turn on general ledger functionality, you must also select an Accounting Code from the dropdown menu. The accounting codes displayed in the dropdown menu represent both the common accounting codes that have been enabled and the new accounting codes established by a merchant manager.

Perform General Ledger Updates:	● Yes ○ No
Cashier ID (Banner only):	CASHIER
Accounting Code:	[dropdown ▼]
Payment Amount Prompt:	campus stuff books campus wear clothing miscellaneous
Default Payment Amount (Example: 1234.56): $	100

15.5   Maintaining Accounting Codes

If a general ledger code changes that is used by a Marketplace accounting code, you must edit the accounting code so that it uses the new value for the general ledger code.

CONFIGURATION SETTING TO MAINTAIN: Common Accounting Codes
DESCRIPTION: Marketplace administrators can edit and delete common accounting codes.

Control Menu Navigation: Marketplace Home > System Administration > Settings > Accounting Codes.

Page: Displays the uStores Common Accounting Codes page.

CONFIGURATION SETTING TO MAINTAIN: **Common Accounting Codes**
DESCRIPTION: **Marketplace administrators can edit and delete common accounting codes.**

Actions: To edit an accounting code, select the corresponding Edit link in the Actions column. The Edit Common Accounting Code page appears. Here, you can enter a new value in the Accounting Code field. For Banner customers, this field is named Banner Detail Code, and PeopleSoft customers will see multiple general ledger fields. The Delete link on the UStores Common Accounting Codes page is only active for accounting codes that are not currently in use, and the Show Merchant Accounting Codes link can be used to view a list of all the accounting codes (both common and merchant-specific) that have been established throughout your institution's implementation of Marketplace.

uStores Common Accounting Codes

Common accounting codes are available to all Marketplace merchants. Merchant managers can choose to use these common codes within their store or UPay site or create their own.

Add Common Accounting Code

Name	In Use?	Actions	
College_Digital Downloads	No	Edit	Delete
GL_College Marketplace	Yes	Edit	Delete
Tax	Yes	Edit	Delete

Show Merchant Accounting Codes

CONFIGURATION SETTING TO MAINTAIN: **Merchant Accounting Codes**
DESCRIPTION: **Merchant managers can enable existing common accounting codes and edit merchant-specific accounting codes.**

Control Menu Navigation: Marketplace Home > [Merchant] > Accounting Codes.

Page: Displays the Marketplace Merchant Accounting Codes page.

**CONFIGURATION SETTING TO MAINTAIN: Merchant Accounting Codes
DESCRIPTION: Merchant managers can enable existing common accounting codes and edit merchant-specific accounting codes.**

Actions: By selecting accounting codes in the selection list box and clicking Add, you can add accounting codes to the Enabled Common Accounting Codes list. Once you enable a common accounting code, it is then available for use by the merchant's store. To remove an enabled common accounting code from this page, select the corresponding Remove link.

To edit a merchant-specific accounting code (for example, to update the general ledger code used by the accounting code), select the corresponding Edit link. The Delete link is only active for accounting codes that are not currently in use.

Marketplace Merchant Accounting Codes

Merchant specific accounting codes are available to this Marketplace merchant only. Merchant managers can choose to use any number of the common accounting codes in addition to the specific codes, or none at all.

```
College_Digital Downloads
GL_College Marketplace
Tax
```

Add >>

Enabled Common Accounting Codes

Name	In Use?	Actions
None currently enabled.		

Add Accounting Code

Current Accounting Codes

Name	In Use?	Actions	
campus stuff books	No	Edit	Delete

16.0 General Ledger Exceptions

When orders are fulfilled and when uPay payments are accepted, Marketplace transfers revenue data into the general ledger system. General ledger exceptions occur when data (such as accounting codes) is incorrect, missing, or fails to transfer. When this happens, the fulfiller will see exception messages, and the store manager will see the Fix General Exceptions task on the home page.

Important! A general ledger exception does not mean a fulfillment has failed. It means only that data could not be transferred to the general ledger system. If you see an exception while processing refunds, do not assume the refund was not processed. Scroll to the bottom of the Fulfillment Details screen to see whether the refund was successfully processed.

Shipping charge exceptions or shipping charge tax exceptions indicate errors related to shipping class setup. Item charge tax exceptions indicate errors related to tax class setup.

General ledger exceptions fall into two main categories:

- "**Being processed"** and "**Unknown" exceptions**. These indicate problems in data transmission.

- **All other exceptions**. Any other exception indicates incorrect or missing data.

16.1 Fixing a General Ledger Exception

Note: Only store managers and merchant managers of the store can fix general ledger exceptions.

Follow these steps to fix a general ledger exception.

1 In the Control Menu, select Marketplace Home > Marketplace Reports > uPay Sites > [merchant] > [uPay site] > GL Exception Report.

 Note: The number in parenthesis following "GL Exception Report" indicates the number of orders with GL exceptions.

2 Review orders where exceptions occurred.

3 Correct data as needed and resubmit, or verify that data was correctly transferred to the general ledger system.

4 Click the Send button.

16.2 Fixing Exceptions Caused By Incorrect Data

The exceptions in the following table indicate that data was incorrect or missing. You must enter the correct data in your Marketplace setup, then resubmit the order for processing to the general ledger.

For these exceptions, correct general ledger codes as needed. Then, mark the Resubmit for Processing option and click the Process Update button. This will resubmit the data for transfer. It has no effect on orders or fulfillments.

Exceptions Caused by Incorrect Data

Exception Message	Procedure
(blank message)	Transaction was not submitted to the general ledger system. This typically occurs when the administrator has disabled general ledger options for Marketplace. Enable the general ledger options.
Missing Data	Data is missing from accounting code fields. The store manager must enter the required information (or the administrator must correct the tax account codes).
Cashier Not Found in [table]	Cashier ID is missing from the site setup. The administrator must enter the default store cashier ID.
Pay Detail Code Not Found in [table] or Charge Detail Code Not Found in [table]	Invalid data was sent; the codes do not exist in the general ledger system. Data must be correct in all fields required for general ledger entry (product, shipping class, tax account, or store cashier ID).
Resubmit - Database error prevented further processing	May indicate the database was not available. Resubmit the order for processing.

16.3   Fixing Exceptions Caused by Data Transmission

The two exception messages Being Processed or Unknown occur when data was sent to the general ledger system but no response could be determined. The data may be in the general ledger system correctly.

First, investigate whether the data was received by the general ledger system. Store managers may need to ask fulfillers for specific order information to track this revenue.

If the data was not received correctly, attempt to resubmit for processing. If it was received correctly, mark the order as completed.

If the exception type is "Being Processed" or "Unknown," verify that its revenue has been transferred to the general ledger system. If yes, select the Mark as Completed option. If no, select the Resubmit for Processing option.

Important! Never mark an order as completed unless you have verified that its revenue was transferred to the general ledger system.

Part 6:

Marketplace Reports

17.0 Marketplace Reports

Each default report shows year-to-date activity for the current year. You can customize your report by changing the date criteria.

To search by a specific date range, enter a new start date and end date. You can either enter the date that you desire or use the calendar button to select a date. If you enter a new start or end in the date fields, be sure to enter the dates in mm/dd/yyyy format.

You can export in CSV format the activity displayed in Marketplace reports. Each report has an Export to CSV button. When you click this button, you'll be prompted to select a location for saving the CSV file.

17.1 Using Marketplace Reports

To use Marketplace reports, click the Marketplace Reports link in the control menu. Once you click the Marketplace Reports link, four submenu selections appear: Marketplace, Merchant Revenue, Stores, and uPay Sites.

These four submenus contain the following report selections:

Report Submenu	Available Reports
Marketplace	Revenue by Merchant Revenue by Accounting Code
Merchant Revenue	Merchant Revenue Report

Report Submenu	Available Reports
Stores	[Store Revenue Report] By Product [Store Revenue Report] By Stock No. [Store Revenue Report] By Product Type [Store Revenue Report] Totals Buyer Information Recurring Payments GL Exception Report
uPay Sites	Revenue Recurring Payments Posting Status GL Exception Report

17.2   Report Types

The reports you see in Marketplace reports depend on your roles.

If you have this Role...	You see these Reports
Administrator, chief administrator, or accountant	Revenue by Merchant (the top-level Marketplace report)
Merchant manager	Merchant Revenue Report Store reports uPay Revenue Report
Store manager	Store reports
uPay site manager	uPay Revenue Report

17.3   Revenue by Merchant Report

Administrators, chief administrators, and accountants can open the top-level merchant report.

It shows a summary of activity by merchant for all stores and uPay sites in your Marketplace system.

17.4 Revenue by Accounting Code

Administrators, chief administrators, and accountants can open the Accounting Code Report.

It shows a summary of activity by accounting code for all stores and uPay sites in your Marketplace system.

By clicking on the View Detail link for each accounting code, you can view a detailed list of all the transactions that use the specified accounting code.

17.5 Merchant Revenue Report

Merchant managers can view the Merchant Revenue Report. This report shows transaction totals for a merchant, as well as totals for each store and uPay site that have established for the merchant.

The example below shows revenue for a merchant with one store and four uPay sites. Revenue is reported for the uPay sites, but no items have been sold yet by the store.

17.6   Store Reports

Four reports are available that summarize store activity for store managers and merchant managers: the Store Revenue Report, the Buyer Information Report, the Store Recurring Payment Group Report, and the Marketplace GL Exception Report.

Store Revenue Report

The Store Revenue Report can be displayed by product, stock number, product type (generic, donation, or deposit), and totals. This report and its four varieties are available for a store's store managers and merchant managers.

The Store Revenue Report by Product is shown in this example:

Store Revenue Report

The default report shows current day information.

Export To CSV

From: 12/01/2008 To: 12/11/2008 Product ▾ **View**

▲▼ Product Name	▲▼ Number Sold	▲▼ Amount Paid
T-shirt with baseball logo	2	$36.00
T-shirt with football logo	1	$18.00
Baseball cap w/ Team logo	1	$15.00
Total:	4	$69.00

On the Store Revenue Report arranged by Product, each product name is linked to a corresponding Product Detail Report that gives additional information about the revenue associated with an individual product. For products with modifiers, you can choose to either expand the display so that all modifiers are shown or collapse the display so the modifiers are hidden.

Product Detail Report

The default report shows current day information.

Back To Store Revenue Report

Export To CSV

From: 12/01/2008 To: 12/11/2008 **View**

Show Product Detail

▲▼ Product Name	▲▼ Order Id	▲▼ Purchaser	▲▼ Date Ordered	▲▼ Date Fulfilled	▲▼ Qty Fulfilled	▲▼ Payment Method	▲▼ Total Amount Paid
Baseball cap w/ Team logo : small	13	kl kl	2008-12-09 10:17:17.0	2008-12-09 10:20:12.0	1	Visa	15.00

The Product Detail Report without product modifiers displayed.

A Product Detail Report with modifiers displayed.

The Store Revenue Report by Totals shows total amounts collected for fulfillments and items sold.

Buyer Information Report

The Buyer Information Report shows transactions by Order ID, Purchaser, Date Ordered, and Payment Method for all orders within a selected time period.

Store Recurring Payment Group Report

The Recurring Payment Report shows all recurring payments that took place during a selected time period. You can view additional information on a payment plan on the Store Recurring Payment Detail Report by clicking the System Tracking ID number. On the Detail Report, you can view scheduled plan payments by selecting a future date range that includes the scheduled payments.

Marketplace GL Exception Report

If your Marketplace site is using general ledger reporting, general ledger exceptions occur when data (such as accounting codes) are incorrect or missing or otherwise fail to transfer into the general ledger system. These

exceptions are grouped in the Marketplace GL Exception Report. The Marketplace GL Exception Report shows all transactions that failed to transfer data into the general ledger system. By clicking the View link in the Action column, you can view detailed information for a specific exception.

Marketplace GL Exception Report

General ledger exceptions occur when data (such as debit or credit account codes) is incorrect, missing, or fails to transfer into the general ledger system.

Order ID	Message(s)	Action
12	Error - Invalid RevenueStream Marketplace Configuration (RSDB 20587)	View
13	Error - Invalid RevenueStream Marketplace Configuration (RSDB 20587)	View
14	Being Processed	View

The exception detail page allows you to edit the cashier ID and the accounting codes and then re-submit the transaction information to the general ledger system (or to simply mark the transaction information as completed).

Cashier Id:		
Host Payment Method Id:		VISA
Default Accounting Code:		campus wear clothing

Shipment Id: 13

Item	Stock #	Accounting Code
T-shirt with baseball logo : medium : black	2228563_1	campus wear clothing ▾
Shipping		campus wear clothing ▾
Tax (1) @ 0.0630		Tax ▾

Purchase Fulfillment (12/09/2008 10:12:27 AM)

Type	Description	Amount	Message	Re-Submit	Mark Completed
shipping	Shipping	4.00	(E) Error - Invalid RevenueStream Marketplace Configuration (RSDB 20587)	○	○
item	T-shirt with baseball logo : medium : black	18.00	(E) Error - Invalid RevenueStream Marketplace Configuration (RSDB 20587)	○	○
tax	Tax (1) @ 0.0630	1.39	(E) Error - Invalid RevenueStream Marketplace Configuration (RSDB 20587)	○	○

Update Order

Important! Never mark an order as complete unless you are sure its revenue has been transferred successfully to the general ledger system. Otherwise, resubmit the data for processing.

17.7   uPay Site Reports

Four reports are available that summarize uPay site activity for uPay site managers and merchant managers: the uPay Revenue Report, the uPay Recurring Payment Group Report, the uPay Posting Status Report, and the uPay GL Exception Report.

uPay Revenue Report

The uPay Revenue report is available for a uPay site's site managers and merchant managers.

Note: Recurring payments appear as revenue on the day the payments are processed. For example, if a recurring payment is set for December 1, the payment will be displayed as revenue on December 1.

The payment information in this report can be exported by using the "Export to CSV" button.

You can determine how many transactions will appear on each page of the Revenue Report by using the "Number of rows per page" field.

uPay Revenue Report

The default report shows current day information.

Export To CSV

From: 12/11/2008   To: 12/11/2008

Number of rows per page: 10

View

uPay Site ID	uPay Site Name	# Of Credit Card Transactions	Total Credit Card Transactions	# Of ACH Transactions	Total ACH Transactions	Total # Of Transactions	Total Revenue
2	Alumni & Friends	2	$938.00	0	$0.00	2	$938.00

Fulfillment Date	System Tracking ID	External Trans ID	Payment Method	Name	TPG Reference Number	One Time / Recurring	Payment Amount
2008-12-11 10:49:50.0	19		Visa	John Doe	20081211000003	Recurring	$250.00
2008-12-11 10:49:51.0	20		Visa	John Doe	20081211000004	Recurring	$688.00

uPay Recurring Payment Group Report

The Recurring Payment Report shows all recurring payments that took place during a selected time period. You can view additional information on a payment plan on the Store Recurring Payment Detail Report by clicking the System Tracking ID number. On the Detail Report, you can view scheduled plan payments by selecting a future date range that includes the scheduled payments.

uPay Recurring Payment Group Report

The default report shows current day information.

Export To CSV

From: 12/11/2008   To: 12/11/2008   **View**

Upay Site ID	Upay Site Name	Processed Transactions	Processed Revenue	Pending Transactions	Pending Revenue
1	Alumni Association	1	$10.00	0	$0.00

System Tracking ID	External Trans ID	Payment Method	Name	Installments	Total Revenue
1		Visa	Aaron Wadle	1 of 52	$10.00

uPay Posting Status Report

uPay sites that use a posting URL also have a Posting Status Report. The uPay site's site manager or merchant manager can see the site's Posting Status report.

The payment information in this report can be exported by using the "Export to CSV" button.

uPay Posting Status Report

The default report shows current day information.

From: 12/11/2008   To: 12/11/2008   **View**

Date / Time	External Trans Id	System Tracking ID	Payment Status	Posting URL	Posting Status
2008-12-11 11:32:56.0	A234	2149	Success	http://ec.touchnet.edu/upay/posting.jsp	Complete

The report shows the following columns for each posted transaction.

- **Date/Time**

- **External Trans ID** – this is the unique ID that would be generated by the external site, and appears only if passed by the external site on the link to uPay.

- **System Tracking ID** – this is the Marketplace order number.

- **Payment Status** – always shows successful transactions and also shows cancelled transactions if you require them in your posted data.

- **Posting URL** – shows your posting URL

- **Posting Status** – shows one of these codes.

  - **Processing** indicates posting currently in process.

  - **Complete** indicates a completed, successful post.

  - **Error** indicates that the external site signaled an error while trying to post the payment.

  - **Unknown** indicates that uPay posted the payment data to the posting URL but did not receive a response. This situation may be the result of high network traffic (a timeout may have occurred). It may also mean the campus server was not available.

  Note: For TouchNet DataCenter customers, a posting status of Unknown may mean the posting URLwas established without the involvement of TouchNet Customer Care. In order for a uPay site to communicate effectively with a posting URL, the TouchNet firewall must be opened for the posting URL. In this situation, please be sure to contact TouchNet Customer Care so that the TouchNet firewall can be configured appropriately for the uPay site.

uPay GL Exception Report

If your Marketplace site is using general ledger reporting, general ledger exceptions occur when data (such as accounting codes) are incorrect or missing or otherwise fail to transfer into the general ledger system. These exceptions are grouped in the Marketplace GL Exception Report. The Marketplace GL Exception Report shows all transactions that failed to transfer data into the general ledger system. By clicking the View link in the Action column, you can view detailed information on the Order Information report for a specific exception.

Marketplace UPay GL Exception Report		
General ledger exceptions occur when data (such as debit or credit account codes) is incorrect, missing, or fails to transfer into the general ledger system.		
Order ID	Message(s)	Action
20	Amount has not been submitted to host system	View

The exception detail page for a selected exception allows you to edit the Accounting Code and then re-submit the transaction information to the general ledger system (or to simply mark the transaction information as completed).

Important! Never mark an order as complete unless you are sure its revenue has been transferred successfully to the general ledger system. Otherwise, resubmit the data for processing.

Part 7:

Quick Reference

18.0 Quick Reference

The quick reference tables in this section summarize key terms, user roles, and common tasks. In addition, the tables describe how to add/edit products, how to work with graphics and layouts, and how to work with other essential components of Marketplace.

18.1 Quick Guide to Key Terms

Accounting Code

(uStores) If you use general ledger options in Marketplace, you can create accounting codes that correspond to the codes in your general ledger system. The Marketplace accounting codes allow you to transfer revenue information to the general ledger system.

ACH

ACH stands for Automated Clearing House. It is the electronic funds transfer network that lets banks electronically transfer and settle credits and debits. When you accept an online payment from a checking or savings account, this is an ACH payment.

Articles

(uStores) Articles are created when a product has options like size or color. An article is a version of a product that requires its own stock number, price, or inventory count.

Cache

(uStores) The cache is the storage space in memory for product and article information. If a product's information is in the cache, it is retrieved from memory rather than the database.

Category

(uStores) A category is a group of products. Buyers navigate the site by clicking category names and reviewing products within categories. All categories may contain sub-categories.

CVV or CVV2

Card Verification Value, also known as the card security code. This number is printed, not imprinted, on a credit card and is usually located in the card's signature area or above the imprinted number on the card. Visa,

MasterCard, and Discover values are 3 digits long on the signature side of the card, while the American Express value is 4 digits on the front of the card.

Delivery method

(uStores) A delivery method is a way to deliver or ship products, for example, "U.S. Mail First Class."

Donations

(uStores) A donation is a special type of product. The buyer enters an amount and is not shown a price.

Fulfillment

(uStores) A fulfillment is the online acceptance of payment and shipment of purchased products. A "fulfillment event" groups ordered products that can be paid for and shipped together.

General ledger

General ledger is a type of accounting software. If general ledger features are used, additional fields and tasks appear in the Operations Center.

General ledger exception

(uStores) A general ledger exception is an error that occurs when purchase data cannot be correctly transferred to the general ledger system. The data may be missing or incorrect in your product or store information.

Groups

(uStores) A group is a set of shoppers who share the same kind of login information. Store managers use groups to restrict who can shop in the stores.

Host System

Host systems are configured in the Payment Gateway Operations Center and used in Marketplace setup. A host system is the name you assign to a computer system where data is stored. For Marketplace, there is typically one host system called "Marketplace," which is used for all of Marketplace.

Host System Account

Host system accounts are configured in the Payment Gateway Operations Center and used in Marketplace setup. A host system account is the name you assign to an account on a host system where information about individual payments is stored. One host system may have any number of host system accounts.

Members-only stores

(uStores) Also called a "private store." A members-only store has been restricted. Only certain groups of shoppers can purchase products in the store.

Merchant

In Marketplace, a merchant is an entity (for instance, a department on campus) that needs to process payments into a single host system account through Payment Gateway. Each merchant in Marketplace can have one store and multiple uPay sites.

Order

(uStores) An order is the set of products purchased in a single shopping cart submission.

Payment Gateway

TouchNet Payment Gateway is the software that processes payments on your campus. It processes credit card payments received from shoppers in your online Marketplace site.

Payment Gateway Subtranscode

The subtranscode tells Payment Gateway which merchant account on campus receives your revenue.

Marketplace Merchant

A Marketplace Merchant represents a campus entity, like a department. Each merchant is managed by a merchant manager user. Each Merchant can have one uStore and multiple uPay sites.

Marketplace Operations Center

The Marketplace Operations Center is the online application where you build and maintain your uStores and uPay sites, fulfill orders, and view Marketplace reports.

Modifiers

(uStores) A modifier is a variable that does not change a product's inventory but may alter its price or shipping. A monogram is one example of a modifier.

Options

(uStores) An option is a product variable, like size or color, that results in a range of stock numbers, prices, or inventory counts for available versions of the product.

Product

(uStores) A product is an item for sale in a store.

Promotion

(uStores) A promotion is a limited-time price discount on a product, one or more categories, or a group of products.

Promotion Archiving

(uStores) Archiving prevents a promotion from being used, but saves the promotion code for later use.

Registered User

A registered user is an end-user who has saved profile information and a login.

Role

A Marketplace user's role determines what tasks the user can perform and which stores the user can manage.

Shipping class

(uStores) A shipping class groups a set of allowed delivery methods and their shipping rates.

Special announcement

(uStores) A different special announcement message can be displayed on the uStores home page and on each individual store's home page.

Tax class

(uStores) A tax class determines the tax rate charged for a given type of product. (Many taxing jurisdictions use only one tax rate. Some have higher rates on certain products.)

Transaction Code

Transaction codes designate system and software commands to retrieve data from your host systems (such as your Student Information System). In Marketplace, transaction codes name which transactions to use for validating campus user logins.

uPay

The uPay features of Marketplace allow you to configure online payment pages that you can connect to your existing applications.

uPay Site

A uPay Site is the set of payment pages that you have configured for a specific purpose. For instance, you might have one uPay site to take alumni donations and another for conference registration fees.

uStores

The uStores features of Marketplace allow you to set up online retail stores and the fulfillment processes for items sold.

18.2   Quick Guide to User Roles

A person with this role:	Can do these things in the Marketplace Operations Center:
Chief Administrator Added during setup or by another chief administrator.	• Adds new administrators and other chief administrators • Adds and manages Marketplace-level users (merchant managers and accountants) • Sets up Marketplace-level features • Adds new merchants • Reviews financial reports
Administrator Added by chief administrator.	• Adds and manages Marketplace-level users (merchant managers and accountants) • Sets up Marketplace-level features • Adds new merchants • Reviews financial reports
Accountant Added by chief administrator or administrator.	• Reviews Marketplace financial report
Merchant Manager Added by chief administrator or administrator.	• Adds store manager or uPay manager • Adds a store or uPay site • Changes merchant settings • Reviews financial reports
Store Manager Added by a merchant manager.	• Sets up and manages online store • Adds/edits fulfillers, store clerks, and store contacts • Adds/edits categories, products, images, groups, and payment methods • Disables products • Creates promotions • Reviews reports

A person with this role:	Can do these things in the Marketplace Operations Center:
uPay Site Manager Added by a merchant manager.	• Sets up uPay site features • Refunds payments as needed • Cancels payment installments as needed • Reviews uPay site reports
Store Clerk Designated by a store manager.	• Adds new products • Edits existing products
Store Contact Designated by a store manager.	• Serves as a store's customer contact. The store contact's e-mail address appears on order confirmations e-mailed to buyers.
Fulfiller with Refund/ Cancel Rights Designated by a store manager.	• Fulfills orders • Cancels orders • Issues refunds • Reviews pending and completed orders
Fulfiller Designated by a store manager.	• Fulfills orders • Reviews pending and completed orders

18.3   Quick Guide to Marketplace System Tasks

Marketplace System Tasks: Manage Marketplace Users and Their Roles

To locate this task:	Log in as:	Navigate From the Control Menu:
Add a new chief administrator	Chief administrator	Marketplace Home > System Administration > User Settings > Users
Add a new administrator	Chief administrator	
Change an administrator or chief administrator's roles	Chief administrator	
Add a new accountant or merchant manager	Administrator	
Add a new store manager	Merchant manager	Marketplace Home > [merchant] > Users
Change the managers of stores or uPay sites	Merchant manager	Marketplace Home > [merchant] > Users > Edit Users link
When adding a store, assign its manager	Store manager	Marketplace Home > [merchant] > Store > Add Store
Add a new fulfiller, store clerk, or designate a new store contact	Store manager	Marketplace Home > [merchant] > Store > [store] > Store Settings > Store Users
Change roles for fulfillers, store clerks, and store contacts	Store manager	
Disable or enable a user	Administrator	Marketplace Home > System Administration > User Settings > Users > View All Users link
Change a user's password	Administrator	Marketplace Home > System Administration > User Settings > Users
Change a user's name or e-mail address	Administrator	

Marketplace System Tasks: Review Reports and Statistics

To locate this task:	Log in as:	Navigate From the Control Menu:
See Marketplace Revenue Reports	Administrators, accountants,	Marketplace Home > Marketplace Reports
See Merchant Revenue Reports	Merchant manager	
See reports for individual store sales	Merchant manager, store manager	
See reports for individual uPay sites	Merchant manager, uPay site manager	
See sales and use statistics for a store promotion	Store manager	Marketplace Home > [merchant] > Store > [store] > Store Settings > Promotions > [promotion code]

18.4   Quick Guide to uStores Tasks

**uStores Display and Navigation Tasks:
Design the General Features of the uStores Site**

To locate this task:	Log in as:	Navigate From the Control Menu:
Change the site name that buyers see	Administrator	Marketplace Home > System Administration > Settings > General
Enter an announcement to show on the site's home page	Administrator	
Enter a default contact e-mail address for the site	Administrator	
Choose the default state or province selection the buyer sees when entering an address	Administrator	
Add a new merchant	Administrator	Marketplace Home > System Administration > Merchants > Add New Merchant
Add a new store	Merchant manager	Marketplace Home > [merchant] > Store > Add Store
Take a store online or offline	Store manager	Marketplace Home > [merchant] > Store > [store] > Store Settings > General
Enter an announcement to show on a store's home page	Store manager	
Change the store name used in Marketplace reports	Store manager	
Enter a store's return policy	Store manager	
Add a privacy policy for the site	Administrator	Create your own privacy policy file and link it to the uStores site.

See Section 4.4, "Adding a Privacy Policy and Online Help" on page 71 for more information. |

**uStores Display and Navigation Tasks:
Design the General Features of the uStores Site**

To locate this task:	Log in as:	Navigate From the Control Menu:
Add online help for buyers	Administrator	Create your own site tips file and link it to the uStores site. See Section 4.4, "Adding a Privacy Policy and Online Help" on page 71 for more information.

**uStores Display and Navigation Tasks:
Structure the uStores Site With Categories and Stores**

To locate this task:	Log in as:	Navigate From the Control Menu:
Add a store	Merchant manager	Marketplace Home > [merchant] > Store > Add Store
Set the order in which stores appear on the site's home page	Administrator	Marketplace Home > System Administration > Settings > Store Listing Order
Choose whether site categories are shown on the site's home page	Administrator	Marketplace Home > System Administration > Settings > General
Set the order in which categories appear on the site's home page	Administrator	Marketplace Home > System Administration > Settings > Categories
Choose whether the site's category links show the number of orderable products the buyer can see in the current category and subcategories	Administrator	Marketplace Home > System Administration > Settings > General

**uStores Display and Navigation Tasks:
Structure the uStores Site With Categories and Stores**

To locate this task:	Log in as:	Navigate From the Control Menu:
Create site-level categories	Administrator	Marketplace Home > System Administration > Settings > Categories
Create subcategories under site categories	Administrator	
Add new store categories	Store manager	Marketplace Home > [merchant] > Store > [store] > Store Settings > Categories
Add subcategories under store categories	Store manager	
Set the order in which categories appear on the store's home page	Store manager	
Move a product from one store category to another	Store manager	Marketplace Home > [merchant] > Store > [store] > Store Settings > Products
Set the order in which products appear within their store category	Store manager	

**uStores Display and Navigation Tasks:
Add or Change Graphics for the uStores Site, Stores, and Categories**

To locate this task:	Log in as:	Navigate From the Control Menu:
Upload a splash image for the site	Administrator	Marketplace Home > System Administration > Settings > Images
Upload a logo image for the site	Administrator	
Enter a URL and description to link to from the site logo	Administrator	

uStores Display and Navigation Tasks:
Add or Change Graphics for the uStores Site, Stores, and Categories

To locate this task:	Log in as:	Navigate From the Control Menu:
Upload a logo image for the store	Store manager	Marketplace Home > [merchant] > Store > [store] > Store Settings > Images
Upload a splash image for the store	Store manager	
Link the store's splash image to a store category, product, or URL	Store manager	
Add a logo image to a site category	Administrator	Marketplace Home > System Administration > Settings > Categories
Add a thumbnail image for a site category	Administrator	
Add a logo image for a store category	Store manager	Marketplace Home > [merchant] > Store > [store] > Store Settings > Categories
Add a thumbnail image for a store category	Store manager	

Store Management Tasks:
Design the General Features of the Store

To locate this task:	Log in as:	Navigate From the Control Menu:
Set the order in which stores appear on the site's home page	Administrator	Marketplace Home > System Administration > Settings > Store Listing Order

**Store Management Tasks:
Design the General Features of the Store**

To locate this task:	Log in as:	Navigate From the Control Menu:
Take store online or offline	Store manager	Marketplace Home > [merchant] > Store > [store] > Store Settings > General
Change the store name used in Marketplace reports	Store manager	
Change the store name that the buyer sees	Store manager	
Enter a return policy for the store	Store manager	
Enter an announcement to show buyers on the store's home page	Store manager	

**Store Management Tasks:
Manage Products, Product Placement, and Promotions**

To locate this task:	Log in as:	Navigate From the Control Menu:
Add a new product	Store manager	Marketplace Home > [merchant] > Store > [store] > Store Settings > Products
Import information about one or more products	Store manager	
Move a product from one store category to another	Store manager	
Move a product to the "Not Shown to Buyer" category	Store manager	
Enable a product for purchase, or disable so it can be seen but not purchased	Store manager	
Select display order for products in categories	Store manager	

Store Management Tasks:
Manage Products, Product Placement, and Promotions

To locate this task:	Log in as:	Navigate From the Control Menu:
If splash layout is used, link the image to a store category, product, or URL	Store manager	Marketplace Home > [merchant] > Store > [store] > Store Settings > Images
Create a new promotion and send promotion info to buyers	Store manager	Marketplace Home > [merchant] > Store > [store] > Store Settings > Promotions

uStores Operations Tasks:
Set Options for Payment and Shipping

To locate this task:	Log in as:	Navigate From the Control Menu:
Choose whether buyers can save payment profiles	Administrator	Marketplace Home > System Administration > Settings > General
Choose whether buyers can save shipping profiles	Administrator	
Create a list of delivery methods that all stores can use	Administrator	Marketplace Home > System Administration > Settings > Delivery Methods
Add a new shipping class and its rates for the store	Store manager	Marketplace Home > [merchant] > Store > [store] > Store Settings > Shipping Rates
Select tax to charge on shipping	Store manager	
Set tax rates for the three available tax levels	Administrator	Marketplace Home > System Administration > Settings > Tax Account Codes
Export donations to a text file (if enabled for your site)	Administrator	

uStores Operations Tasks:
Set Options for Payment and Shipping

To locate this task:	Log in as:	Navigate From the Control Menu:
Enter a return policy for a store	Store manager	Marketplace Home > [merchant] > Store > [store] > Store Settings > General

uStores Operations Tasks:
Manage the Transfer of Data to the General Ledger (if enabled for your site)

To locate this task:	Log in as:	Navigate From the Control Menu:
Enter a code for each tax level that can be charged	Administrator	Marketplace Home > System Administration > Settings > Tax Account Codes
Enter default credit code for products	Store manager	Marketplace Home > [merchant] > Store > [store] > Store Settings > General
Override the default credit code for a new product	Store mMager	Marketplace Home > [merchant] > Store > [store] > Store Settings > Products (Step 2 of the Add a New Product Wizard)
Edit the credit code for an existing product	Store manager	Marketplace Home > [merchant] > Store > [store] > Store Settings > Products (click on product name link)
Enter an accounting code for tax on a new shipping class	Store manager	Marketplace Home > [merchant] > Store > [store] > Store Settings > Shipping Rates
Troubleshoot and fix general ledger information	Store manager	Marketplace Home > [merchant] > Store > [store] > Store Settings > General Ledger Exceptions

18.5   Quick Guide to uPay Tasks

uPay Tasks: Work with uPay Sites

To locate this task:	Log in as:	Navigate From the Control Menu:
Add a uPay site	Merchant manager	Marketplace Home > [merchant name] > uPay Sites > Add uPay Site
Add or change uPay site managers	Merchant manager, uPay site manager	Marketplace Home > [merchant name] > Users
Change site features	Merchant manager, uPay site manager	Marketplace Home > [merchant name] > uPay Sites > [uPay site name]
Look up, refund, or cancel a payment	Merchant manager, uPay site manager	Marketplace Home > [merchant name] > uPay Sites > [uPay site name] > Payment Search

18.6   Quick Guide to Adding or Editing Products

This section explains how to add a product and how to edit an existing product. It also briefly describes some of the fields you will encounter when adding or editing products.

Adding a New Product

To add a product to your store, navigate from the Control Menu > Marketplace Home > [merchant] > Store > [store name] > Store Settings > Products. Then click the Add a New Product link to start the Add a New Product Wizard, which is a series of screens that will walk you through the process.

Editing an Existing Product

To edit an existing product, navigate from the Control Menu > Marketplace Home > [merchant name] > Store > [store name] > Store Settings > Products. Change the category if the product is not visible in the list. Then click the product name link. Make your changes and click the Save button when you are finished.

Product Field Descriptions

You will see the following fields when adding or editing a product:

Product Name

Shoppers see the product name when browsing in the site. It also appears in order and billing confirmations, store financial reports, and fulfillment event records. This field accepts a maximum of 200 characters. To use product names with more than 50 characters, however, we recommend you customize the uStores stylesheet. This customization is necessary so that all the characters in the product name are properly displayed in the product thumbnail layout. For more information about customizing stylesheets, see the *Marketplace 5.0 CSS Guide*.

Short Description

Shoppers see this short product description in the detailed product layout. This field accepts a maximum of 500 characters. This field accepts HTML.

Depending on the chosen store or category layout, shoppers may add some products to the cart without seeing the long descriptions. Put critical details in both the short and long descriptions to make sure shoppers see this information.

Long Description

Shoppers see this description when they go to an individual product page. Price and options (such as size and color) appear below the description on the product page displayed to shoppers. You may, however, want to use your long description to provide shoppers with additional information about the available options.

If the product requires special shipping information or if its return policy differs from the store policy, you can add those details here.

Depending on the chosen store or category layout, shoppers may add some products to the cart without seeing the long descriptions. Put critical details in both the short and long descriptions to make sure shoppers see this information.

The Long Description field accepts a maximum of 30,000 characters. This field also accepts HTML.

Price

The product price appears with all product descriptions, and in a shopper's order confirmation. If your product has options such as size and color, enter a base price in this field. You can enter the adjusted product price for each combination of options later.

Product Type

The product type is either Generic or Donation. A generic product would be an item for purchase, such as a shirt.

Days to Wait Before Processing ACH Payments

Enter the number of days you want fulfillers to wait for an ACH payment to clear before shipping a product.

Shipping Class

Choose from your store's shipping classes. Its shipping rates will be charged when a shopper buys the product and picks a shipping method.

If none of the shipping classes is right for the product, choose one of the existing classes. Finish adding the product, but at the end of the process, select the "Disable this product for now" checkbox. Next, adjust your shipping classes so you can charge correct shipping rates for the product. Then, in the Manage Products pages, edit the product with the correct shipping class. Finally, enable the product.

Tax Class

Choose no tax, default tax rate, or higher tax rate. Your Marketplace administrator has set the tax rates for each of these options. The correct tax rate for your product depends on your local taxation requirements. Check with your administrator if you don't know which tax class is right for your product.

Accounting Code Override

You will only see this field if you are transferring data to a General Ledger system.

The revenue from each of your products is tracked in an account. During store setup, you (or the store manager) entered a default code for this account. The default code is displayed above the Accounting Code Override field. If your product uses a different code from the default, select the correct code.

Special Authorization Required

Mark Yes if a shopper must provide proof of authorization to purchase the product.

Special Authorization Prompt

Enter up to 200 characters. If authorization to purchase is required, this text tells the shopper what information to enter.

Shipping/handling message

Enter up to 100 characters. Enter any shipping/handling message to be included in the printable packing slip.

Upload full size image

The full size image appears with the product details when the shopper clicks the product name. The image must be in GIF, JPG, or PNG format, with a maximum width by height of 250 x 250 pixels, and maximum file size of 250K.

Upload thumbnail image

The thumbnail image appears in product lists in the store and in categories that use images in their layouts. The image must be in GIF, JPG, or PNG format, with a maximum width by height of 80 x 80 pixels, and maximum file size of 250K.

Does product have options?

If the product has options like size or color that result in individually tracked articles, with their own inventory counts and stock numbers, mark Yes.

The New Product Wizard will prompt you to define your options, then will open separate pages for each resulting article. There, you enter the inventory count, stock number, price, and back-orderable status, just as described below for a single product.

Track inventory?

Mark Yes to track the product's inventory. If yes, enter the initial inventory quantity.

Back orderable?

Mark Yes if a shopper can order the product even when the quantity available is zero.

Stock #

You must enter a stock number. If your product doesn't use a stock number, click the Assign Random Stock # button. Marketplace will assign a number to use for tracking and reports.

Allowed Host System Payment Account Methods

Select the payment methods that shoppers can use to purchase the product. The available payment methods for the product were established when the merchant was created, at which time the merchant was linked to a Payment Gateway host system account.

Disable this product for now

Mark this checkbox if you don't want the product to be displayed immediately in your store. To enable the product for display, leave the checkbox empty.

To change a product's enabled or disabled status later, click its status link in the Manage Products pages.

Choose Marketplace Categories

Select up to three site-level categories where your product will appear.

Choose In-Store Category

Select a category in your store. Your product will appear in this category. The default category is "Not Shown to Buyers." This category doesn't appear in the shopping site, and you can use it to store products you don't want to display.

After your initial category selection, you can move the product to another store category anytime. You can also control the listing order for products in each category.

18.7   Quick Guide to Graphics and Layouts

Images in Marketplace

Image	Appears Here in the Site	Width by Height (in Pixels)
uStores site splash image	On the shopping site's home page.	Recommended 530 x 280
uStores site logo	At the top of all uStores pages.	Required 269 x 75
Store logo	Left-hand side of the store's pages, if no category image is available.	Recommended 150 x 300
Store splash image	On the store's home page.	Recommended 530 x 280
Category logo (site and store)	Left-hand side of the category's pages.	Recommended 150 x 300
Category thumbnail (site and store)	In lists of subcategories.	Recommended 80 x 80
Product full-size	With product details.	Recommended 250 x 250
Product thumbnail	Product lists within stores or categories.	Recommended 80 x 80
uPay banner	On the left-hand side of uPay pages.	Required 167 x 350
uPay header	Across the top of uPay pages.	Required 800 x 165
uPay footer	Across the bottom of uPay pages.	Required 800 x 80
uPay Cancel and Continue buttons	Below fields on uPay pages	Required 100 x 30

Other Image Rules and Tips

- **File formats.** All image files must be saved in GIF, JPG, or PNG format.

- **File sizes.** All images have a maximum file size of 250K.

- **Blank or All-Purpose Images.** To give the site or store a more consistent look, you may want to create graphics in each size that can be used for categories, stores, or products that have no images of their own.

- **Linking images to web pages**. In the site's general settings, an administrator can link the site's logo image to a URL, such as the campus home page. In a store's image settings, a store manager can link the store's splash image (if the Splash layout is used) to a URL, a store category, or a product in the store.

Product Layouts for Site and Stores

Layout	How Products Are Displayed
Name and Price	Shopper sees a list of product names and prices. The shopper clicks a product name, then sees the full-size image, long description, and Add to Cart button.
Thumbnail	Shopper sees product thumbnail images and names. Products appear from left to right in rows on the page. The shopper clicks a product image or name, then sees the full-size image, long description, and Add to Cart button.
Detailed	Shopper sees product thumbnail images, product names, short descriptions, prices, and the Add to Cart button. If the shopper clicks a product image or name, the full-size image and long description are displayed with an Add to Cart button.

18.8   Quick Guide to Essential Communications

Essential Information	Who Has the Information	Who Needs the Information
Delivery methods: New methods available, methods to be deleted, and changes to method names.	Administrator	All merchant managers and store managers
Tax classes and tax rates: Tax rates for each tax class, tax class to use for various types of products, local tax guidelines.	Administrator	All merchant managers and store managers
New stores: Name of new store, username and password for manager's first login, URLs of shopping site and Operations Center	Merchant manager	New store manager
User roles: Changes in roles or in stores managed.	Administrator, merchant manager, or store manager	Modified user
New users: Username and password for first login, URLs of shopping site and Operations Center	Administrator, merchant manager, or store manager	New user
uStores site categories: New categories, changes to category names, intent to remove categories in use.	Administrator	All merchant managers and store managers
Changes in order shipment: Quantity shipped (if less than quantity ordered), order cancellations.	Fulfiller with refund/cancel rights	Buyer
Errors in data posted from a uPay site	Merchant manager or uPay site manager	System administrator

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