

U.Commerce[®]

Marketplace 6.5

User's Guide

May 2015

This document contains confidential information and may not be duplicated or disclosed to third parties, in whole or in part, for any purpose, without the prior express written consent of TouchNet Information Systems, Inc.

Information represented in this document is subject to development and change without notice.

Copyright 2015 TouchNet Information Systems, Inc.

All rights reserved.

TouchNet® and the TouchNet logo are trademarks of TouchNet Information Systems, Inc.

Other trademarks within this document are the property of their respective owners. Other product or company names may be trademarks of their respective owners.

Document release date: May 2015

Contents

About this Guide	1
What's New in Marketplace 6.5	3
<i>Marketplace Introduction</i>	7
1.0 Introduction to Marketplace	9
1.1 Marketplace Web Applications	9
1.2 Getting Started	10
1.3 Your Home Page	19
1.4 Your User Profile	27
<i>What Customers See</i>	29
2.0 What Shoppers See	31
2.1 Viewing the uStores Web Site	31
2.2 What Shoppers See: The Mall	32
2.3 What Shoppers See: Product Categories	46
2.4 What Shoppers See: The Cart	49
2.5 What Shoppers See: My Account	54
2.6 What Shoppers See: Stores	61
2.7 What Shoppers See: Single-Store Mode	74
2.8 What Shoppers See: Social Media	86
<i>Administrative and Merchant Setup</i>	91
3.0 Administrative and Merchant Setup	93
3.1 Planning Ahead	94
3.2 System Administration Settings	97
3.3 Mall Style Sheets	132
3.4 Administrative Users	138
3.5 Merchants	142
3.6 Tax Configuration	154

<i>Building and Managing Stores</i>	159
4.0 Adding and Setting Up Stores	161
4.1 Adding a New Store	161
4.2 Store Settings	162
4.3 Store Status Management	173
4.4 Text Messaging	179
4.5 Single-Store Mode	181
4.6 Store User Roles	200
4.7 Images	206
4.8 Payment Methods	208
4.9 Shipping Classes	212
4.10 Store Product Categories	217
4.11 Allowed Groups	221
4.12 Group Payment Methods	223
4.13 Creating Store Promotions	224
4.14 User Modifiers (Buyer Info)	230
4.15 Taxes	238
4.16 Assigning Tax Account Codes	240
4.17 Linking to a Store	241
5.0 Adding Products to a Store	245
5.1 Adding a Single Product Using the Wizard	245
5.2 Importing Product Lists	261
5.3 Adding a Package	266
5.4 Managing Products in a Store	276
5.5 Editing Products	283
5.6 Editing a Package	299
5.7 Using Product Options	315
5.8 Using Product Modifiers	330
5.9 Product Status Management	352
5.10 Linking to a Product	355
6.0 User Groups and Private Stores	357
6.1 About User Groups and Authentication	357
6.2 About Private Stores	357

6.3	Becoming a Registered User and Adding Group Memberships	358
6.4	How to Establish a Private Store	359
6.5	How to Add an Authentication Method	360
6.6	How to Create a User Group	362
6.7	How to Link to Marketplace with Group Logins	363
7.0	Orders	369
7.1	Order Search	369
7.2	About Payment Types and Fulfillment	373
7.3	Fulfillments	374
7.4	Cancelling an Order or Changing Order Quantity	381
7.5	Working with Backordered Items	382
7.6	Processing Refunds	383
7.7	Receiving an E-Mail Message When an Order is Submitted	387
7.8	About Authorizing Credit Cards at Order Time	387
8.0	Automatic E-mail Messages	389
8.1	Examples of E-mail Messages	389
8.2	Editing E-mail Messages	392
8.3	uStores E-mail Addresses	395
	<i>Building and Managing uPay Sites</i>	397
9.0	What is uPay?	399
9.1	An Overview of uPay	399
9.2	What uPay Customers See	401
9.3	Planning Ahead for uPay	410
10.0	Building a uPay Site	421
10.1	Before You Build a uPay Site	421
10.2	Using Marketplace to Create a uPay Site	423
10.3	Passing Parameters to Your uPay Site	456
10.4	Using the VALIDATION_KEY Option	469
10.5	Using a Posting URL	475
10.6	Bringing Your uPay Site Online	482

11.0 Managing a uPay Site	483
11.1 Changing uPay Site Features	483
11.2 Style Sheet Modifications	484
11.3 Taking Your uPay Site Offline	491
11.4 Deleting a uPay Site	492
11.5 Adding uPay Site Users	492
11.6 Editing uPay Site User Roles	493
11.7 Payment Search, Refunds, and Cancellations	494
12.0 Automatic E-mail Messages	501
12.1 Examples of E-mail Messages	501
12.2 Editing E-mail Messages	502
12.3 uPay E-mail Addresses	503
<i>General Ledger Information</i>	505
13.0 General Ledger Information	507
14.0 Setup for Banner by Ellucian	509
14.1 About Accounting Codes	510
14.2 Configuring System Administration Settings	512
14.3 Configuring Merchant Settings	515
14.4 Configuring Store Settings	518
14.5 Configuring uPay Settings	522
14.6 Configuring An Authentication Method for Banner	523
14.7 Maintaining Accounting Codes	525
14.8 Using Departmental Charges	529
15.0 Setup for Colleague by Ellucian	537
15.1 About Accounting Codes	538
15.2 Configuring System Administration Settings	540
15.3 Configuring Merchant Settings	543
15.4 Configuring Store Settings	545
15.5 Configuring uPay Settings	549
15.6 Maintaining Accounting Codes	550

16.0 Setup for PeopleSoft	555
16.1 About Accounting Codes	556
16.2 Configuring System Administration Settings	557
16.3 Configuring Merchant Settings	559
16.4 Configuring Store Settings	562
16.5 Configuring uPay Settings	566
16.6 Maintaining Accounting Codes	567
17.0 Marketplace Exceptions	573
17.1 General Ledger Exceptions	573
17.2 Posting Exceptions	579
<i>Marketplace Reports</i>	585
18.0 Marketplace Reports	587
18.1 Using Marketplace Reports	587
18.2 Report Types by User Role	588
18.3 Administrative Reports	588
18.4 Merchant Reports	591
18.5 Store Reports	593
18.6 uPay Site Reports	601
<i>Index</i>	609

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 6.5 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 Customer Care

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

Telephone:	888-621-4451 or 913-599-6699
Fax:	913-599-5588
E-mail:	CustomerCare@touchnet.com
Web site:	https://clientcommunity.touchnet.com/web
Address:	TouchNet Information Systems, Inc. 15520 College Boulevard Lenexa, Kansas 66219

TouchNet Customer Care 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.

What's New in Marketplace 6.5

Marketplace 6.5 contains the following enhancements:

- **Packages**—Marketplace allows you to group products into packages, which you can offer to customers at discounts (or at any price that you think is appropriate). The products that will be part of the package must have previously been added as individual products to a store in Marketplace. The process of creating a package involves first selecting which products should be included in the package and then configuring the package settings. For more information, see ["Adding a Package" on page 266](#).
- **Sale prices**—You can now display to customers that a product is on sale. This configuration is on the Product Settings page in the Operations Center. When Yes is selected for the On Sale setting, uStores will display both the previous price (with strikeout) and the sale price (in red). For more information, see ["Editing Products" on page 283](#).
- **Linked modifiers**—Marketplace allows you to link modifiers so that the display of a modifier can be configured to depend upon the shopper's answer to a previous modifier. For example, a shopper might encounter this modifier question: "Would you like us to contact you for future donations?" And if the shopper answers Yes to this question, another modifier would appear: "Please enter your phone number." For more information, see ["Using Linked Modifiers" on page 344](#).
- **Related products**—Products can be configured to display links (and prices and thumbnails) for related products that the customer may also be interested in purchasing. When customers see these related products, they may be encouraged to make an additional purchase. For more information, see ["Related Products" on page 73](#).
- **Scheduled price changes**—You can schedule price updates for products. For more information, see ["Scheduling Price Updates" on page 282](#).
- **Social Media**—Social media integration is available for Marketplace uStores (as well as Mobile Marketplace). When this functionality is turned on, customers will see links for social media functionality. The following social media types are available: Facebook, LinkedIn, and Twitter. For more information, see ["What Shoppers See: Social Media" on page 86](#).
- **Accounting codes for modifiers**—You can assign an override accounting code to product modifiers. These accounting codes override the default accounting code for the product or the store. For more information, see ["Using the Add/Edit Product Modifier Pages" on page 336](#).

- **TouchNet Ready Partner names associated with uPay sites**—You can select a TouchNet Ready Partner to be associated with each uPay site. This partner name will appear beside the uPay site name and ID on the Marketplace home page, making it easy to identify how the uPay site is being used. The partner name will also appear on the Marketplace GL Exceptions page and the Marketplace Posting Exceptions page. For more information, see "**Payment Settings**" on page 423.
- **Home page enhancements**—The Marketplace Operations Center home page now allows you to search orders AND uPay site transactions across all stores and uPay sites. It also allows you to directly launch uStores (both for the mall and for specific stores). Additional columns on the home page display merchant names and the display mode (mall or single-store). The uPay site section now contains a column that allows you to easily identify if a uPay site uses T-Link. New sorting and searching functionality helps you find stores and uPay sites quickly. For more information, see "**Your Home Page**" on page 19.
- **Tax service**—Marketplace now offers a tax service for computing taxes. The tax service maintains tax rates for all USA states and territories. Tax rates are updated monthly. Tax rates are applied at a ZIP+4 level, thus providing greater accuracy. For more information, see "**Tax Configuration**" on page 154.
- **Table Builder for modifiers**—Table Builder organizes modifiers into a table format, making it more convenient for customers to enter information for multiple modifiers during the uStores checkout process. For more information about Table Builder, see "**Using Product Modifiers**" on page 330.
- **Dynamic frequency for modifiers**—Modifiers that the user designates as dynamic will be repeated for each quantity ordered. For example, if the product is an event registration, the customer might register multiple people to attend the event. You can use the Dynamic frequency option to repeat the modifier prompt and ask for a name and contact information (or any other information you desire) for each registrant. For more information about using the dynamic frequency, see "**Using Product Modifiers**" on page 330.
- **E-mail message enhancements**—The formats of several automatic e-mail messages have been improved and are now sent in HTML format. These e-mail messages include order confirmations, fulfillment confirmations, and refund confirmations for uStores and Notification of Payment messages for uPay. For more information, see "**Automatic E-mail Messages**" on page 389.
- **Localization**—You can now configure the default time zone for your installation of Marketplace (on the Administrative General Settings page) and this time zone will be used for transactions, reports, and other Operations Center functionality.

- **Text entry validation for modifiers**—With the text entry type of product modifier, you will have the opportunity to determine if validation should be performed on the customer's entry. Several validation methods are available. For more information, see ["Validation Formats for Text Entries" on page 339](#).
- **QR codes**—You can now generate QR codes that can be downloaded for use on printed material. Each QR code represents a URL for a destination within the Marketplace mall, such as the mall home page, a product category, a store home page, or a product detail page. Users with mobile phones—and applications with QR code functionality—can photograph the Marketplace QR code and immediately navigate to the web page that is represented. For more information, see the *Mobile Marketplace Guide*.
- **Image upload**—You can now upload images for use with style sheets. These images can be uploaded for the mall style sheet, for single-store mode style sheets, and for uPay style sheets. See ["Style Sheet Image Management" on page 136](#) for more information.
- **Additional items can be offered during checkout**—You can now configure additional items to be offered to shoppers during the checkout process. Additional items can be configured for both uStores and uPay. See ["Additional Donations" on page 419](#) for more information.
- **Integration with PeopleSoft General Ledger**—Marketplace now features general ledger integration with PeopleSoft General Ledger. When PeopleSoft general ledger functionality is used with Marketplace, accounting codes can be established and associated with Marketplace stores, uPay sites, products, tax rates, and shipping rates. See ["Setup for PeopleSoft" on page 555](#) for more information.
- **Preview mode for uStores**—You can use the preview status to view how a store will look and function before bringing the store online. Preview status is particularly important if you have made modifications to the style sheet of a store in single-store mode: once you make the style sheet modifications, you can use preview mode to see the effects of the style sheet modifications. See ["Using Preview Status" on page 176](#) for more information.
- **Scheduling of store status changes**—You can now schedule status changes for stores. For example, you can schedule when a store should be online (and thus available for shoppers) by entering a specific date and time. Likewise, you can schedule when a store that is currently online should go offline. See ["Scheduling Status Updates" on page 178](#) for more information.
- **Campus cards**—You can now configure stores and uPay sites to accept campus cards. Supported campus cards include Blackboard and CBORD. See ["Notes on Payment Methods" on page 209](#) for more information.

- **Product articles and options are now editable**—As your inventory changes, you can modify the product articles to meet your needs. Marketplace now allows you to modify product options for existing products and to add new options. Articles are also now known as "Items for Sale." See "**Product Status Management**" on page 352 for more information.
- **Enhancements to donation amount fields for uStores**—You can now configure donation products to display multiple suggested donation amounts to customers. You can also choose to display an entry field for a customer-entered donation amount. See "**Editing Donation Settings**" on page 296 for more information.
- **Tax reports**—New Marketplace reports are available that contain tax information. These reports are available for the entire mall, for specific merchants, and for individual stores. These reports show the tax collected, tax rates, and other tax-related information. See "**Administrative Tax Report**" on page 590 for more information.
- **Enhanced Product Detail Report**—You can now decide which products to display on a Product Detail Report. Instead of seeing all the orders from a store, choose only the products that interest you on the "Store Revenue Report" and generate a report customized for those products. See "**Store Revenue Report by Product**" on page 593 for more information.
- **Additional text can now be added to uPay confirmation messages**—You can now add text to uPay e-mail confirmation messages. This text will appear at the top of confirmation messages. See "**Miscellaneous: Links, URLs, and E-mail**" on page 436 for more information.
- **Alternate text for continue button in uPay**—You can now change the text that will be used on the Continue button in uPay. See "**Miscellaneous: Links, URLs, and E-mail**" on page 436 for more information.
- **Prompt for user timeout**—A prompt for users will now appear after the timeout period has been reached. This prompt will appear for uStores customers, uPay customers, and Operations Center users.
- **Disable uPay e-mail message**—You can now configure your uPay site to NOT send Payment Notification e-mail messages when payments are received. This configuration is on the uPay Miscellaneous Settings page.
- **Partner-Driven Recurring Payments with T-Link**—TouchNet Ready Partners can now control the recurring payment process by initiating each payment. The partner first passes parameters to T-Link that establish an ongoing payment relationship. Once the customer enters their payment information, the partner's web application can initiate future payments for the customer. For more information, see the *T-Link Guide for TouchNet Ready Partners*.

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.

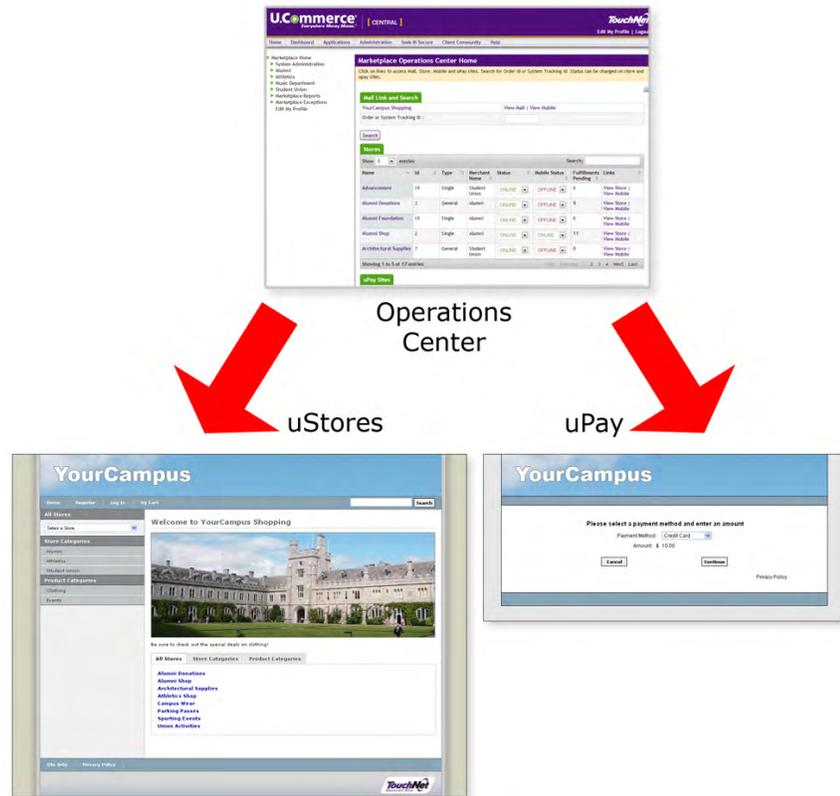
TouchNet Marketplace does not require extensive programming skills to implement and deploy. It uses TouchNet Payment Gateway™ for electronic payment processing; it uses the Marketplace Operations Center as the web software interface that allows you to build and manage online shopping sites and online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



The Operations Center is used for creating both stores and uPay sites.

Cookies Are Required

All Marketplace web applications use cookies. In order for users to configure uStores or uPay sites with the Marketplace Operations Center, users must use web browsers with cookie functionality enabled. Likewise, shoppers who visit uStores (or customers who visit uPay site payment pages) must use web browsers with cookie functionality enabled.

1.2 Getting Started

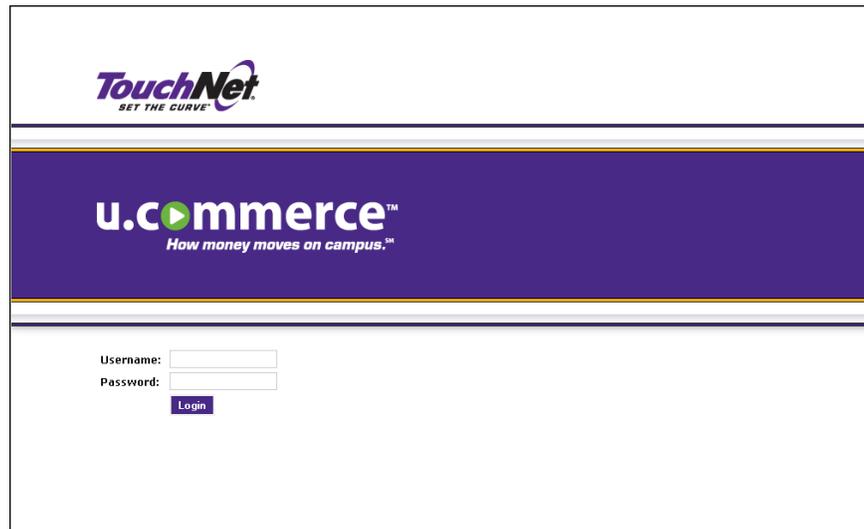
Your first step in building online shopping sites and online payment pages is to use your web browser to launch U.Commerce. Marketplace is part of U.Commerce. So you must first navigate to U.Commerce and login.

To launch U.Commerce, you need the U.Commerce URL, as well as a username and password.

Where do you get the U.Commerce URL and login credentials?

- If you are the chief administrator logging in for the first time, you will get the U.Commerce URL, username, and password from your TouchNet implementation specialist.
- Existing U.Commerce users can be given access to Marketplace by the following Marketplace users: administrators, merchant managers, store managers, and uPay site managers.
- New U.Commerce users must be created through User Management in U.Commerce. Then Marketplace access can be granted by administrators or managers in Marketplace.

When you enter the U.Commerce URL in your browser's address field, the Login page for U.Commerce appears, as shown below.



The screenshot shows the U.Commerce login page. At the top is the TouchNet logo with the tagline 'SET THE CURVE™'. Below that is a dark blue banner with the U.Commerce logo and the tagline 'How money moves on campus.™'. Underneath the banner is a white login form with two input fields: 'Username:' and 'Password:'. A purple 'Login' button is positioned below the password field.

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 that allowed them to create new users (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 U.Commerce, you will see the U.Commerce home page. The top navigation bar shows all the U.Commerce products that are available for you to use. Marketplace will appear as one of the links in the top navigation bar.

Click on the link for Marketplace. The Marketplace Operations Center Home page will now load.

Name	Id	Type	Merchant Name	Web	Fulfillments Pending	Links
Alumni	20	Advancement	Alumni	Enabled	0	View Store
Cafeteria	10	Single	Student Union	Enabled	0	View Store
Languages	4	General	Languages	Enabled	0	View Store
Physical Education	18	General	Sporting	Enabled	0	View Store Preview
Single Store Layout Test	3	Single	Merchant 1	Enabled	1	View Store
Single Store No Image	5	Single	Merchant 1	Preview	0	View Store
Store 1	1	Single	Merchant 1	Enabled	7	View Store
Store 16	16	Single	Demo Merchant 5	Enabled	2	View Store

The Marketplace Operations Center Home page.

On your very first login, you'll be taken to your Marketplace User Profile page so you can enter your name and contact information. After you enter this information, your Marketplace Operations Center 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 to the user. If this is the first time you have used 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

The left navigation menu provides navigation within the Marketplace Operations Center. The U.Commerce Navigation Menu provides links for U.Commerce functionality. The top right menu provides links for Edit My Profile and Logout.

The left navigation 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 left navigation menu 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 left navigation menu.

The screenshot shows the 'Marketplace Operations Center Home' page. The left navigation menu includes the following items:

- Marketplace Home
- System Administration
- Advancement Merchant
- Demo Merchant 13
- Demo Merchant 3
- Merchant 1
- Merchant 2
- Marketplace Reports
- Marketplace Exceptions
- Edit My Profile
- Help

The 'Stores' table contains the following data:

Name	Id	Type	Merchant Name	Web	Fulfillments Pending	Links
Alumni	20	Advancement	Alumni	Yes	0	View Store
Cafeteria	10	Single	Student Union	Yes	0	View Store
Languages	4	General	Languages	Yes	0	View Store
Physical Education	18	General	Sporting	Preview	0	View Store Preview
Single Store Layout Test	3	Single	Merchant 1	Yes	1	View Store
Single Store No Image	5	Single	Merchant 1	Yes	0	View Store
Store 1	1	Single	Merchant 1	Yes	7	View Store
Store 16	16	Single	Demo Merchant 5	Yes	2	View Store

In the example above, the user has system administrative rights (as indicated by the System Administration link in the left navigation menu). The user also has access to several stores, so statistics for these stores appear on the home page (as well as the Mall Link and Search section).

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 example shows the left navigation menu after stores and uPay sites have been added to a merchant

Marketplace Users

So now you've launched the Marketplace Operations Center 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	<ul style="list-style-type: none"> • Responsible for adding additional chief administrator and administrators. (See Section , "Adding Administrative Users" on page 140.) • Responsible for editing administrative-level user roles. • Can reset user passwords for all users. • Can modify user information for all users. • Can disable users. • Can also perform any of the responsibilities listed below for administrators.

User Role	Responsibilities
Administrator	<ul style="list-style-type: none"> • Responsible for creating merchants. (See "Adding Merchants" on page 143.) • Responsible for assigning merchant managers to merchants. ("Adding Managers" on page 150.) • Responsible for establishing and maintaining configuration settings that affect all Marketplace stores, including accounting codes, tax account codes, product categories, splash page images, header images, and ACH agreements for stores. ("System Administration Settings" on page 97.) • Responsible for assigning an accountant to view reports. (See "Adding Administrative Users" on page 140.)
Accountant	<ul style="list-style-type: none"> • Responsible for reviewing the Revenue by Merchant report. ("Revenue by Merchant Report" on page 589.)
Merchant Manager	<ul style="list-style-type: none"> • 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. ("Merchant Settings" on page 145) • Responsible for adding stores to a merchant. ("Adding a New Store" on page 161.) • Responsible for assigning store managers to stores and uPay site managers to uPay sites. (See "Adding Managers" on page 150 and "Adding uPay Site Users" on page 492.) • Responsible for adding uPay sites to a merchant. ("Building a uPay Site" on page 421)
Store Manager	<ul style="list-style-type: none"> • Responsible for managing store settings, such as the store images, store categories, store payment methods, and shipping rates. ("Store Settings" on page 162) • Responsible for assigning store clerks, a store accountant, and fulfiller users (including a fulfiller with refund/cancel rights). ("Adding Store Users" on page 204.) • Responsible for adding and editing products. (See "Adding Products to a Store" on page 245.) • Responsible for creating store promotions. (See "Creating Store Promotions" on page 224.)
Store Clerk	<ul style="list-style-type: none"> • Responsible for adding and editing products. ("Adding Products to a Store" on page 245.) • Responsible for moving products among categories. (See "Managing Products in a Store" on page 276)
Fulfiller	<ul style="list-style-type: none"> • Responsible for fulfilling orders. (See "About Payment Types and Fulfillment" on page 373.)

User Role	Responsibilities
Fulfiller with refund/cancel rights	<ul style="list-style-type: none"> Responsible for fulfilling orders as well as refunding and cancelling orders. (See "Processing Refunds" on page 383.)
uPay Site Manager	<ul style="list-style-type: none"> Responsible for managing uPay site settings. (See "Managing a uPay Site" on page 483.) Responsible for assigning payment clerks and accountants. (See "uPay User Roles" on page 400.)
Payment Clerk	<ul style="list-style-type: none"> Responsible for issuing uPay refunds. (See "Refund a Payment" on page 498.)
Accountant	<ul style="list-style-type: none"> Responsible for viewing reports. Both stores and uPay sites can have accountants. (See "Marketplace Reports" on page 587.)

Assigning Roles to Users

Roles are assigned to users at various levels within the Marketplace Operation Center. The following table describes where roles are assigned and which users can assign these roles:

Users with this User Role ...	Can assign this user role to other users ...	By navigating to this page in the Operations Center ...
Chief administrator	<ul style="list-style-type: none"> Chief administrator Administrator Accountant Merchant manager 	Marketplace Home > System Administration > User Settings > Users
Administrator	<ul style="list-style-type: none"> Administrator Accountant Merchant manager 	Marketplace Home > System Administration > User Settings > Users
Merchant manager	<ul style="list-style-type: none"> Store manager uPay site manager 	Marketplace Home > [merchant] > Users
Store manager (and merchant manager)	<ul style="list-style-type: none"> Store clerk Fulfiller Fulfiller with cancel/refund rights Store accountant 	Marketplace Home > [merchant] > Stores > [store] > Store Settings > Store Users
uPay site managers	<ul style="list-style-type: none"> Payment clerk Accountant 	Marketplace Home > [merchant] > uPay Sites > [uPay site] > Users

Note: As can be seen from this table, a user who only has the role of administrator cannot directly assign the store manager role to a user. A merchant manager must make this assignment. (However, an administrator

could assign themselves the merchant manager role and then assign themselves the store manager role.)

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.

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 to Marketplace 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 U.Commerce Central 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 U.Commerce Central URL to the new administrator.
- 3 Assign Administrative Settings**—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, store categories, and product categories. In addition, these settings include the splash page and header image graphics. Style sheets can also be customized.

- 4 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 U.Commerce Central URL to the new merchant manager.
- 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 U.Commerce Central URL to the new user.
- 7 Complete Store or uPay Site Configuration**—Each store manager logs in and enters the store configuration settings for that store. These settings include a header image, store categories, store payment methods, and shipping classes.
- 8 Assign Store Clerk**—(Optional.) 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 U.Commerce Central URL if the store clerk is a new user).
- 9 Assign Fulfiller Role**—(Optional.) 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 U.Commerce Central 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**—A store manager or store clerk performs product maintenance, which includes editing product features, moving product into categories, 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, payment clerks 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, merchant managers, and store accountants can view the Store Revenue report (by product, stock number, and product type, as well as by totals). uPay site managers, merchant managers, and store accountants can view the uPay Revenue report and the Posting Status report.

1.3 Your Home Page

After you launch 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 may appear.

The Marketplace Operations Center home page provides important information and allows you to get to key pages quickly.

The screenshot shows the TouchNet U.Commerce Marketplace Operations Center Home page. The page has a purple header with the TouchNet and U.Commerce logos. Below the header is a navigation bar with links: Home, Dashboard, Applications, Administration, Seek-N-Secure, Client Community, and Help. On the left side, there is a sidebar menu with options like Marketplace Home, System Administration, Advancement Merchant, Demo Merchant 13, Demo Merchant 3, Merchant 1, Merchant 2, Marketplace Reports, Marketplace Exceptions, Edit My Profile, and Help. The main content area is titled 'Marketplace Operations Center Home' and includes a 'Mall Link and Search' section with a 'View Mall' link and a search field for 'Order or System Tracking ID'. Below this is a 'Stores' section with a table listing various stores.

Name	Id	Type	Merchant Name	Web	Fulfillments Pending	Links
Alumni	20	Advancement	Alumni	Enabled	0	View Store
Cafeteria	10	Single	Student Union	Enabled	0	View Store
Languages	4	General	Languages	Enabled	0	View Store
Physical Education	18	General	Sporting	Enabled	0	View Store Preview
Single Store Layout Test	3	Single	Merchant 1	Enabled	1	View Store
Single Store No Image	5	Single	Merchant 1	Preview	0	View Store
Store 1	1	Single	Merchant 1	Enabled	7	View Store
Store 16	16	Single	Demo Merchant 5	Enabled	2	View Store

Mall Link and Search Section

On the first line of this section is a link for View Mall, which can be used to launch the uStores mall. If you have licensed Mobile, you will also see a link for View Mobile.

The Order or System Tracking ID search field provides search functionality for both uStores orders and uPay payments. This search functionality works across ALL stores and uPay sites--that the user has access to. Simply enter the search criteria and select the Search button.

To use additional search criteria, select the Advanced Search text link (located to the right of the Search button. For more information, see ["Advanced Search" on page 24](#).

Stores Section

The Stores section displays a list of all the stores for which you have access as a merchant manager (or as a store user). This table provides a snapshot of activity in stores. You can set the number of stores to display in this table by using the Show field and choosing an appropriate number. You also have search functionality so you can easily locate specific stores.

The Stores table provides access to the following information for each store:

Name

You can click on the store name to go to the Store General Settings page.

ID

The store ID number.

Type

Identifies whether a store is in mall mode (General) or single-store mode (Single).

Merchant Name

Identifies the merchant for the store, which allows you to better understand where to find the store in the left navigation menu (which is arranged by merchant).

Web

This field indicates the status of the store: Enabled (the store is online), Disabled (the store is offline), and Preview (the store is in preview mode). If you have licensed Mobile, you will see a separate status column for Mobile. You can change the status of stores by using the Gear column dropdown menus.

Fulfillments Pending

This column displays the number of pending fulfillments for each store. If you click on the number in this column, you will go to the Store Fulfillments page. (The numbers are clickable in this column only if you have the fulfillment role for the corresponding store.)

Links

You can click the View Store link to launch uStores and display the selected store. For stores in PREVIEW mode, you can click the View Store Preview to view the store in preview mode. If you have licensed Mobile, you will see a View Mobile link.

[Gear]

The Gear column provides dropdown menus that allow you to change the status of stores. Three status selections are used: Enable, Disable, and Preview. If a store is enabled, shoppers can shop at the store. If a store is disabled, shoppers cannot shop at the store: the store will not appear in the uStores mall. If a store is in Preview mode, shoppers cannot shop at the store; however, a store manager can use the View Store Preview link in the Links column to launch the store and view its home page, categories, and products. You can change the status of multiple stores by selecting the checkboxes in the far left column and then using the Gear dropdown menu in the column heading.

uPay Sites Section

The uPay Sites section displays a list of all the uPay sites for which you have access as a merchant manager (or as a uPay site user). This table provides a snapshot of activity in uPay sites. You can set the number of uPay sites to display in this table by using the Show field and choosing an

appropriate number. You also have search functionality so you can easily locate specific uPay sites.

The uPay Sites table provides access to the following information for each uPay site:

Name

You can click on the uPay site name to go to the uPay Miscellaneous Settings page.

ID

The uPay site ID number.

Uses T-Link

This column provides a simple Yes/No answer to the question "Does the uPay site use T-Link?"

Merchant Name

Identifies the merchant for the uPay site, which allows you to better understand where to find the uPay site in the left navigation menu (which is arranged by merchant).

Partner Name

Identifies the TouchNet Ready Partner associated with the uPay site. This value can be selected on the uPay Payment Settings page.

Web

This field indicates the status of the uPay site: Enabled (the uPay site is online) and Disabled (the uPay site is offline), and Preview (the store is in preview mode). You can change the status of uPay sites by using the Gear column dropdown menus.

Transactions

This column displays the number of transactions that were processed for the current day. If you click on the number in this column, you will go to the uPay Payment Search page.

[Gear]

The Gear column provides dropdown menus that allow you to change the status of uPay sites. Two status selections are used: Enable and Disable. If a uPay site is enabled, its pages are available for payments. If a uPay site is disabled, its pages are not available for payments. You can change the status of multiple uPay site by selecting the checkboxes in the far left column and then using the Gear dropdown menu in the column heading.

Site Navigation

Your home page contains the same site navigation links that you'll find throughout the Operations Center. The left navigation menu 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 menu includes links for Edit My Profile and Logout. (Your profile page is discussed in **"Your User Profile" on page 27.**)

The left navigation menu give you access to those stores and uPay sites for which you have been granted a user role. If you have not been granted a user role for a store or uPay site, no corresponding link will appear in the left navigation menu.

Advanced Search

The Advanced Search page allows you to use additional criteria for uStores order search and uPay payment search. You can navigate to the Advanced Search page by selecting the Advanced Search text link on the Marketplace Home page.

Advanced Search

Search by any of the available information.

Print Page 

Hide uStores Order Search
Hide uPay Payment Search

uStores Order Search

Enter one or more filter values for order search.

Order Number:	<input type="text"/>
Order Date:	From: <input type="text"/>  To: <input type="text"/> 
Fulfilled Date:	From: <input type="text"/>  To: <input type="text"/> 
Payment Gateway Reference Number:	<input type="text"/>
Credit Card Authorization Code:	<input type="text"/>
Customer Name:	<input type="text"/>
Customer Email:	<input type="text"/>

Run Search

uPay Payment Search

Enter one or more filter values for payment search.

System Tracking ID:	<input type="text"/>
Payment Date:	From: <input type="text"/>  To: <input type="text"/> 
Payment Gateway Reference Number:	<input type="text"/>
Credit Card Authorization Code:	<input type="text"/>
External Transaction ID:	<input type="text"/>
Linked Session Id:	<input type="text"/>
Customer Name:	<input type="text"/>
Customer Email:	<input type="text"/>
Customer Phone Number:	<input type="text"/>

Run Search

When you use the search functionality on the Advanced Search page, you search all stores and uPay sites for which you have been granted a user role.

Note: If you would like to search within a specified store or uPay site, navigate to the order/payment search page for that store or uPay site.

uStores Order Search

To use uStores Order Search, enter values in one or more of the following search fields and then select the Run Search button.

Order Number

When an order is submitted, an order number is assigned. This order number appears in the confirmation e-mail message sent to the customer. To search with an order number, you must enter a complete order number (i.e., if you enter a partial order number, you will get zero search results).

Order Date

The date that the customer submitted the order. If you search by Order Date, you must enter a date range by using the From and To fields. You can select a date by selecting the calendar icon.

Fulfilled Date

The date the order was fulfilled. If you search by Fulfilled Date, you must enter a date range by using the From and To fields. You can select a date by selecting the calendar icon.

Payment Gateway Reference Number

The reference number returned by Payment Gateway after the transaction was processed. This order number appears in the confirmation e-mail message sent to the customer. (See the note below regarding partial entries.)

Credit Card Authorization Code

The credit card authorization code is returned by Payment Gateway after the transaction is processed. This number is stored as part of the order's fulfillment information. (See the note below regarding partial entries.)

Customer Name

The name entered by the customer as the billing name when the order was submitted. (See the note below regarding partial entries.)

Customer Email

The e-mail address entered by the customer on the Delivery Address page of the uStores checkout process. (See the note below regarding partial entries.)

Note: You can make partial entries in the following fields: Payment Gateway Reference Number, Credit Card Authorization Code, Customer Name, and Customer Email. If you make a partial entry in any of these fields, all orders with matching data anywhere in the specified field will appear in the search results.

For information about using search results for uStores, see ["Order Search" on page 369](#).

uPay Payment Search

To use uPay Payment Search, enter values in one or more of the following search fields and then select the Run Search button.

System Tracking ID

When a uPay payment is submitted, a System Tracking ID is assigned. This ID appears on the uPay receipt page displayed to the customer, and it is included in uPay notification e-mail message sent to the customer. To search with the System Tracking ID, you must enter a complete System Tracking ID (i.e., if you enter a partial value, you will get zero search results).

Payment Date

The date that the customer submitted the payment. If you search by Payment Date, you must enter a date range by using the From and To fields. You can select a date by selecting the calendar icon.

Payment Gateway Reference Number

The reference number returned by Payment Gateway after the transaction was processed. This order number appears in the confirmation e-mail message sent to the customer. (See the note below regarding partial entries.)

Credit Card Authorization Code

The credit card authorization code is returned by Payment Gateway after the transaction is processed. This number is stored as part of the payment information in the Operations Center. (See the note below regarding partial entries.)

External Transaction ID

If the campus web application generated an ID for the transaction and passed this parameter to the uPay site, you can search for the payment by using this value. (See the note below regarding partial entries.)

Linked Session ID

uPay payments made via T-Link will have a Linked Session ID. As part of the T-Link process, this value is returned to the originating web application as the session_identifier. (See the note below regarding partial entries.)

Customer Name

The name entered by the customer as the billing name when the payment was submitted. (See the note below regarding partial entries.)

Customer Email

The e-mail address entered by the customer during the uPay payment process. (See the note below regarding partial entries.)

Customer Phone Number

The phone number entered by the customers during the uPay payment process. (See the note below regarding partial entries.)

Note: You can make partial entries in the following fields: Payment Gateway Reference Number, Credit Card Authorization Code, External Transaction ID, Linked Session ID, Customer Name, Customer Email, and Customer Phone Number. If you make a partial entry in any of these fields, all orders with matching data anywhere in the specified field will appear in the search results.

For information about using search for uPay, see ["Look Up a Payment" on page 495](#).

1.4 Your User Profile

From your home page, you can select the Edit My Profile link in the left navigation menu to view your user profile. This page includes your name, your e-mail address, and your store notification setting.

The Email Information section allows you choose which e-mail address to use with Marketplace. You can either use the e-mail address that is configured with your U.Commerce account (select "U.Commerce Email") or you can configure a new e-mail address (select the "Email" radio button and enter the e-mail address).

Update Profile

Welcome, Gary Johnson! From this page you can update your email information and select store notifications.

User Information

U.Commerce Username:	TNDV.gjohnson
First Name:	Gary
Last Name:	Johnson

Email Information

Change your email information.

<input checked="" type="radio"/> U.Commerce Email:	gjohnson@touchnet.com
<input type="radio"/> Email:	<input type="text" value="rstill@touchnet.com"/>

Update Email

Store Notifications

To receive an email when an order is placed, select from the following stores.

<input type="checkbox"/> Advancement
<input type="checkbox"/> Alumni Donations
<input type="checkbox"/> Alumni Foundation
<input type="checkbox"/> Alumni Shop
<input type="checkbox"/> Architectural Supplies
<input type="checkbox"/> Athletics Shop
<input type="checkbox"/> Campus Wear

Fulfillers, merchant managers, and store managers can opt to receive e-mail messages when orders are placed.

The Store Notifications section allows 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 name and click the Update Notifications button near the bottom of the page.

When the e-mail notification option is turned on for a specific store, you will receive a separate e-mail message for every order.

Part 2:
What Customers See

2.0 What Shoppers See

This section describes what shoppers will see in the Marketplace shopping application, uStores. (For a discussion of the Marketplace payment page application, uPay, see "[Building and Managing uPay Sites](#)" on page 397.)

Before you start using the Marketplace Operations Center to create stores, you need to understand what stores look like. So before we plunge into the plethora of settings that can be used for establishing stores, this section provides you with a detailed overview of what you can expect your customers to see.

2.1 Viewing the uStores Web Site

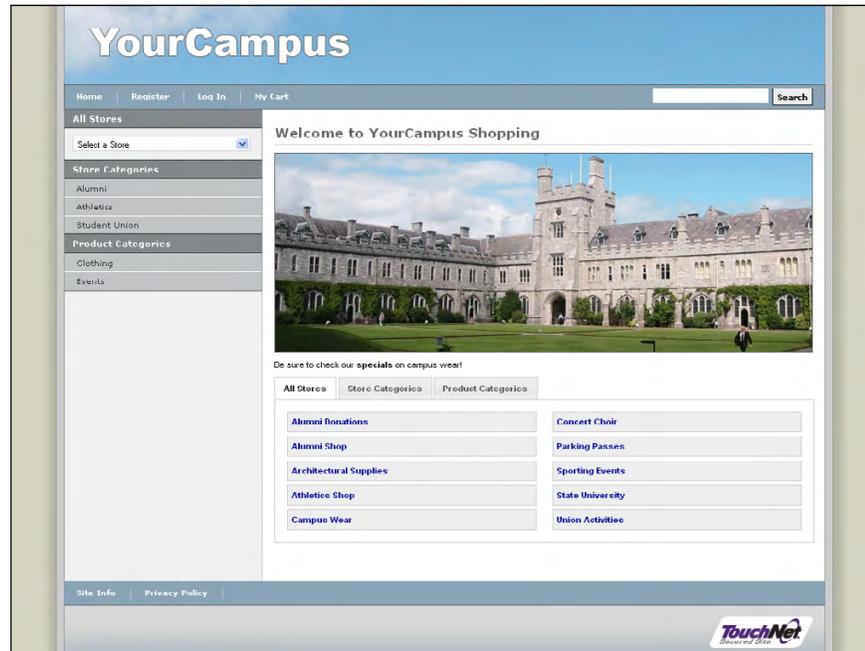
As you use the Marketplace Operations Center to create stores, categories, and products, you'll want to view the results of your work by looking at the shopping application. In uStores, you'll see store pages, category pages, and product pages.

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 a header image in the header, your splash page image, an announcement message, and your set of store categories, product categories, and stores. These customizations are created during the uStores system-level setup. For more information about these customizations, see **"Administrative and Merchant Setup" on page 93.**

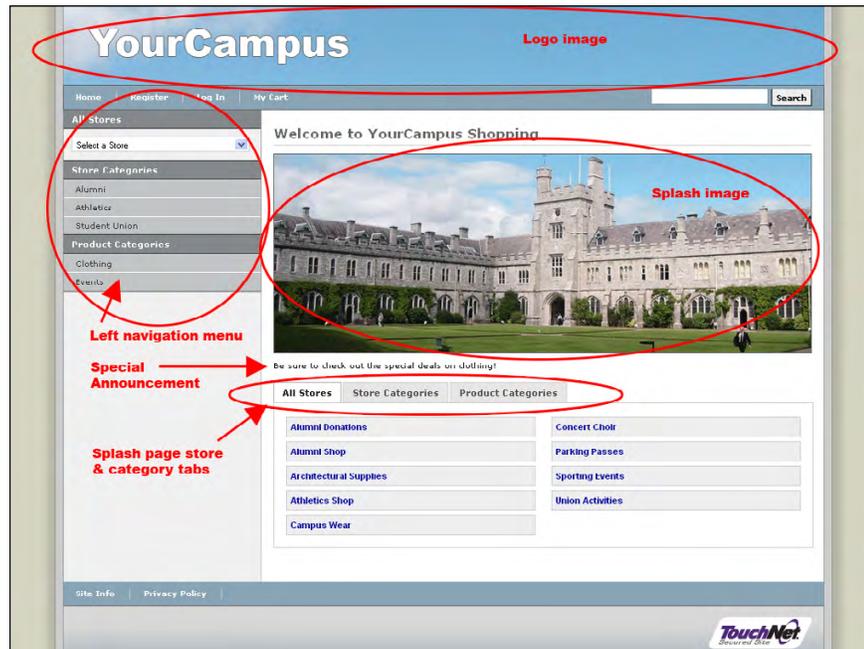
2.2 What Shoppers See: The Mall

Marketplace stores are displayed by default to shoppers in the uStores mall. The uStores mall is a collection of stores that can be used as a retail center for commerce by your campus. For example, the Athletics Department can sell tickets for sporting events. The Student Union can sell campus clothing. The Alumni Group can take donations. The English Department can set up registrations for writing seminars. Etc., etc. etc.

The uStores mall is a collection of all the stores that are set up by these departments or groups. Stores in the uStores mall are arranged via "Store Categories" into various groupings in ways that make sense to your school. For example, all the Student Union-related stores might be placed in store category called "Student Union." All the stores related to the Athletics Department might be placed in a store category called "Athletics."

Products in the uStores mall can be arranged via "Product Categories." For example, all clothing products, regardless of the stores, can be placed in a category called "Apparel." Or all campus events (sporting events, seminars, theatrical productions, etc.) can be placed in a category called "Events."

Here is an example that shows what a campus mall might look like, with the major components of the page labeled.



Notice that store categories and product categories are available in the left navigation menu. In addition, store categories and product categories are available from the tabs below the mall splash image.

Header Image

The header image appears as the page header for all pages throughout the uStores mall (except for stores in single-store mode, which can use their own header image). This image is configured on the Image Settings page in the System Administration section of the Operation Center:

System Administration > Settings > Images

Header images can be uploaded in whatever size you think is necessary. However, unless you modify the mall style sheet, we recommend the default size of 960 pixels wide by 100 pixels high.

Splash Image

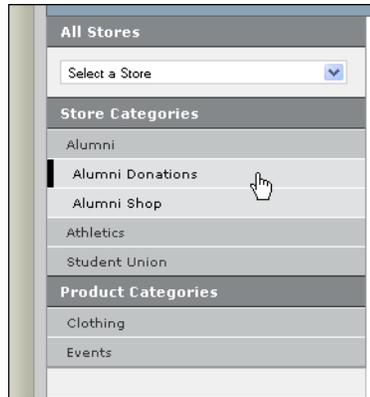
The mall splash image only appears on the mall's home page. You can use this image to provide shoppers with a visually appealing design when they first arrive on the sight. This image is configured on the Image Settings page in the System Administration section of the Operation Center:

System Administration > Settings > Images

The splash image can be uploaded in whatever size you think is necessary. However, unless you modify the mall style sheet, we recommend the default size of 680 pixels wide by 250 pixels high.

Left Navigation Menu

The left navigation menu provides an easy means for your customers to navigate quickly to stores and product categories.



Specific stores can be reached in one of two ways: 1) the All Stores dropdown menu can be used to select any store and 2) the Store Categories can be clicked to reveal the stores available within each category.

In the above example, the store category named "Alumni" has been clicked to reveal two stores: Alumni Donations and Alumni Shop.

Product Categories can be used to group similar products from across stores throughout the mall. For example, clothing in the Alumni Shop, clothing in the Athletics Shop, and clothing in the Student Union's Campus Wear store can all be combined in the product category named "Clothing."

The system administrator is responsible for creating store categories and product categories that can be used by all the stores in the mall. Store categories can be configured on the Store Categories page in the System Administration section of the Operation Center:

System Administration > Settings > Store Categories

Product categories can be configured on the Product Categories page in the System Administration section of the Operation Center:

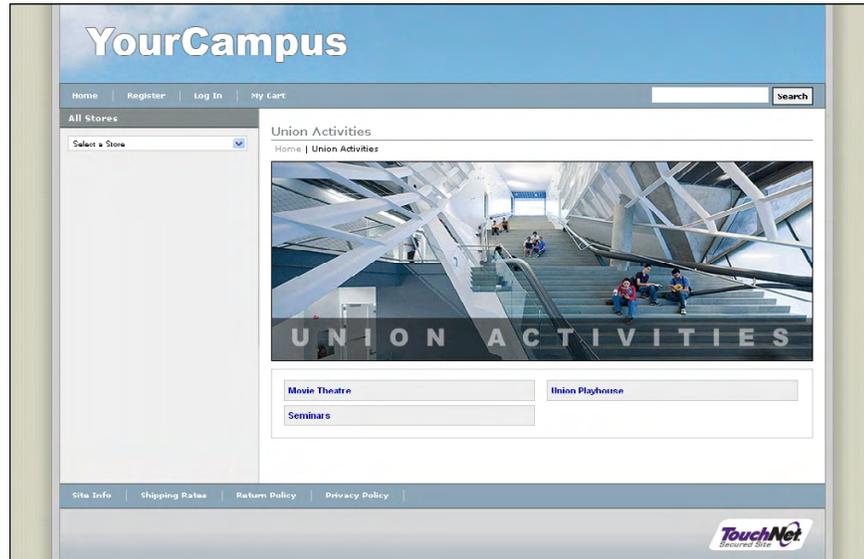
System Administration > Settings > Product Categories

The system administrator can create as many store categories or product categories as necessary for your campus's uStores mall.

About Building the Left Navigation Menu

The administrator and store managers must work together in order to build the left navigation menu. The administrator must create store categories and product categories that are appropriate for your uStores mall. We strongly recommend that the administrator consult the store managers regarding categories that would be useful and helpful for shoppers. Once these categories are created, store managers can assign their stores to store categories and their products to product categories.

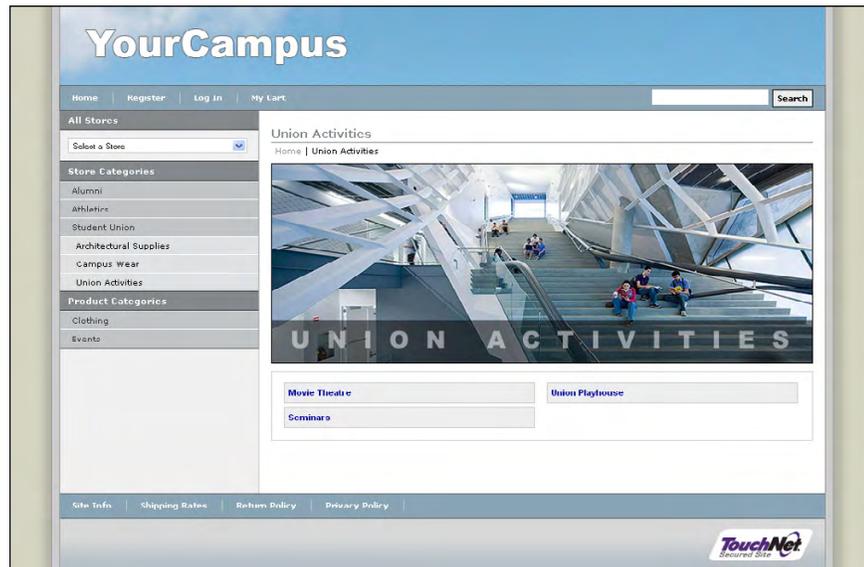
Here is an example of a left navigation menu BEFORE store or product categories have been created:



No categories have been created for this mall.

In the above example, no store categories or product categories have been created. Notice how the left navigation menu is empty except for the All Stores dropdown menu.

The following example shows an example left navigation menu AFTER the administrator and store managers have worked together to build appropriate categories:



Several categories have been created for this mall.

In the above example, the administrator created three store categories and two product categories. The store managers then associated their stores with

the appropriate store categories and their products with the appropriate product categories.

More About Store Categories

Store categories allow you to arrange stores into logical groups. This becomes increasingly important as the number of stores grows in your Marketplace mall.

Instead of merely listing all the mall's stores in a long list, you can create store categories so that shoppers can see at a glance the types of stores that exist in the mall. For example, an Alumni group might have several stores, and these can all be grouped together in a store category called "Alumni." Likewise all the Student Union stores could be grouped together. Or all the Athletics Department stores could be grouped together.

Once store categories are created by an administrator in the System Administration section of the Operation Center, store managers then see a selection box on the Store General Settings page for each store:

[merchant name] > Stores > [store name] > Store Settings > General

The selection box for Marketplace Store Category Assignments allows store managers to assign their stores to one or more store categories.

The Importance of Using Store Categories

Prior to Marketplace 6.5, the name of every store was always visible in the left navigation menu. For schools with lots of stores, the left navigation menu quickly became a long and unwieldy list of store names. In some cases, the list extended far down the page, forcing shoppers to search through many store names in order to find the stores that interested them.

Now, by using store categories, Marketplace administrators and store managers can group stores in ways that will reduce the length of the left navigation menu and help shoppers quickly find stores.

We strongly recommend that 1) your Marketplace administrator create store categories and 2) your store managers assign their stores to these categories. By taking these actions, you will help build the left menu and provide your shoppers with more navigation options.

Important! If you DO NOT create store categories and assign stores to these categories, shoppers will only find store names in the left navigation menu by opening the All Stores dropdown menu.

Top Navigation Menu

The top navigation menu appears on every page in the uStores mall. It appears on all store pages. It appears on the cart and checkout pages.

Here is an example of the top navigation menu:



The top navigation bar sits at the bottom of the header.

The top navigation menu contains the following information:

- **Home**—the Home link takes shoppers to the mall home page.

- **Register**—the Register link allows shoppers to become registered users by creating their own account, which can be used for storing payment method information, address information, and other contact information. Registered users also have access to their purchase history. In addition, some stores (private stores) may require shoppers to be registered users.
- **Log In**—the Log In link allows registered users to log in.
- **My Cart**—the My Cart link takes shoppers to their shopping cart.
- **Search**—the Search functionality allows shoppers to search stores and products.

Bottom Navigation Menu for the Mall

The bottom navigation menu for the uStores mall provides links to additional web pages. Here is an example of the bottom navigation menu:



The bottom navigation menu provides various links.

The bottom navigation menu links are described in the following tables:

What Do the Bottom Navigation Links Look Like?

Link Name	Is the link optional?	Can the link text be customized?	Where can the link be configured?
Site Info	Yes	Yes	Enable button and link text field on the General Settings page (see page 98).
Privacy Policy	Yes	Yes	Enable button and link text field on the General Settings page (see page 98).*
Help	Yes	Yes	Enable button and link text field on General Settings page (see page 98). *
Accessibility	Yes	Yes	Enable button and link text field on General Settings page (see page 98).*

Link Name	Is the link optional?	Can the link text be customized?	Where can the link be configured?
Contact Us	Yes	No	The "Default email address for Contact Us link in mall footer" field on the General Settings page (see page 98). An entry in this field causes the "Contact Us" link to appear. Each store can have it's own "Contact Us" e-mail address. For more about how this link can change on store pages, see " Bottom Navigation Menu for Stores " on page 69 .
*Can be configured separately for stores in single-store mode (see page 78).			

What Do the Bottom Navigation Links Do?

Link Name	What happens when the link is selected?	Can the info page be edited?	Comments
Site Info	A modal window appears that contains the Site Info page.	The Site Info page can be customized by using the Site Info HTML field on the General Settings page (see page 98).**	The Site Info page can be used to display basic information about the site or about how to use the site.

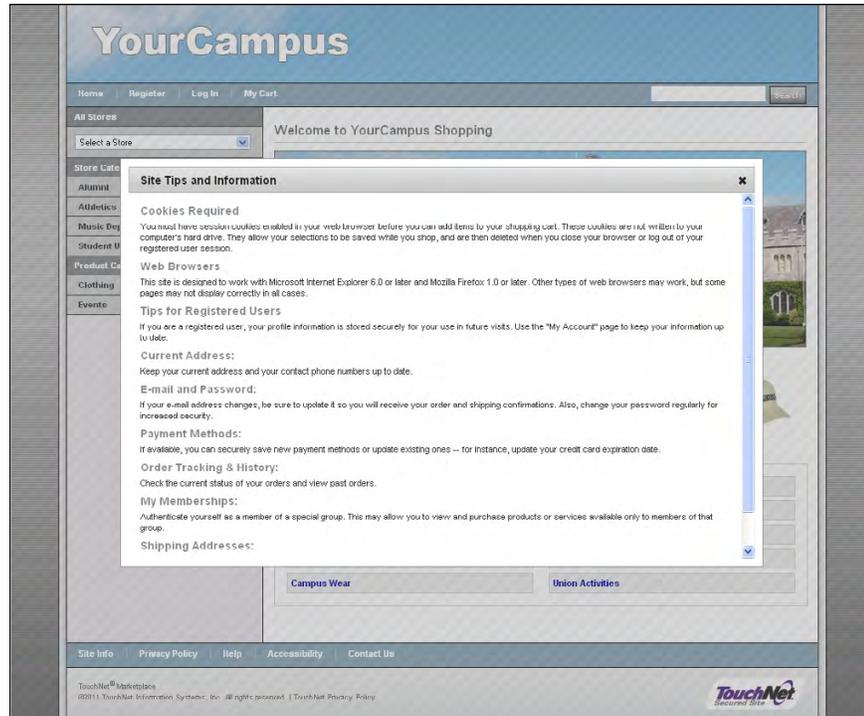
Link Name	What happens when the link is selected?	Can the info page be edited?	Comments
Privacy Policy	A modal window appears that contains the Privacy Policy page.*	The Privacy Policy page can be customized by using the Privacy Text HTML field on the General Settings page (see page 98).**	The Privacy Policy link page displays information about the campus policy toward user privacy. TouchNet strongly recommends that you develop policies regarding the privacy of shoppers' data and the use of unsolicited bulk e-mail.
Help	A modal window appears that contains the Help page.*	The Help page can be customized by using the Help HTML field on the General Settings page (see page 98).**	The Help page displays information about how to use the site.
Accessibility	A modal window appears that contains the Accessibility page.*	The Accessibility page can be customized by using the Accessibility HTML field on the General Settings page (see page 98).**	The Accessibility page displays information about the campus policy toward user accessibility. TouchNet strongly recommends that you develop policies regarding user accessibility.

Link Name	What happens when the link is selected?	Can the info page be edited?	Comments
Contact Us	A new message is opened in the customer's default e-mail client	Not applicable.	When shoppers select the Contact Us link, their default e-mail software application will be launched so that the shopper can send a message to the uStores contact e-mail address.
<p>*Can also be configured with a URL to launch a web page in a separate browser window. This web page may exist on any web server that is accessible to your customers.</p> <p>**Can be configured separately for stores in single-store mode (see page 78).</p>			

The bottom navigation menu contains additional links when store pages are displayed. For more about the bottom navigation menu for stores, see ["Bottom Navigation Menu for Stores" on page 69](#). And parts of the bottom navigation menu are optional and customizable for stores in single-store mode. For more about the bottom navigation menu for stores in single-store mode, see ["Optional Page Elements" on page 78](#).

Modal Windows

Modal windows are used to display several pages that contain additional information. These windows are superimposed on the uStores pages and are opened via links in the bottom navigation menu.



Modal windows are used to display additional site information.

Modal windows are used with the following links in the bottom navigation menu:

- Site Info
- Privacy Policy
- Help
- Accessibility

For more about configuring the info pages that are displayed when these links are selected, see **"Bottom Navigation Menu for the Mall" on page 37**.

In addition, when you are on a store page, modal windows are used with the following additional links in the bottom navigation menu:

- Shipping Rates
- Return Policy

For more about configuring these store-level info pages, **"Bottom Navigation Menu for Stores" on page 69**.

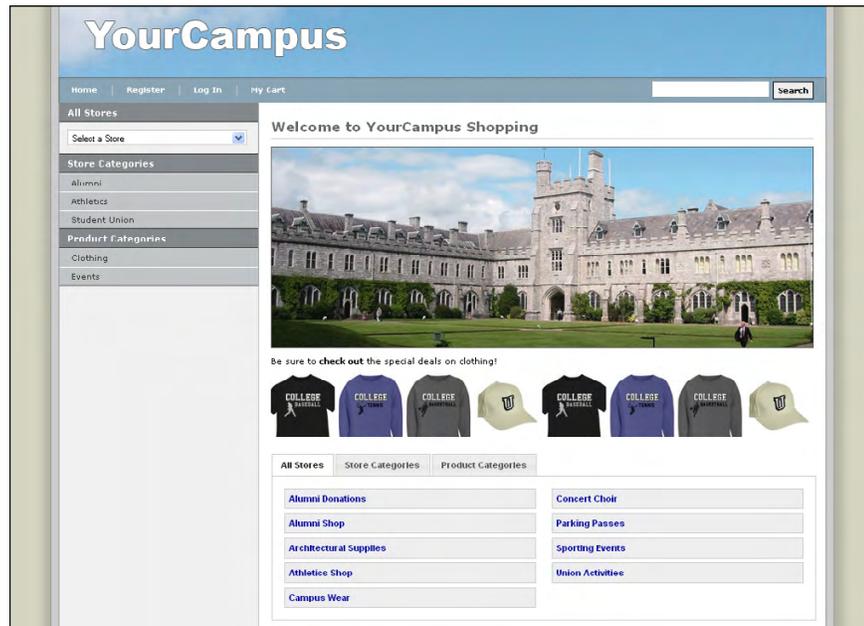
Parts of the bottom navigation menu are optional and customizable for stores in single-store mode. For more about the bottom navigation menu for stores in single-store mode, see ["Optional Page Elements" on page 78](#).

Special Announcement

The mall's special announcement field appears below splash images. You can use this field to provide shoppers with key information about your uStores mall. For example, you can use this field to tell shoppers about a sale or clearance items.

The special announcement field accepts HTML. This presents many options for enhancing the look of announcements (such as adding bold text or changing the text color). Advanced users with experience coding HTML can even add additional design elements via the special announcement field (such as HTML tables or images).

Here is an example mall home page in which HTML was used with the special announcement field to add sample product images to the page design:



In this example, the clothing thumbnails were added via the mall's special announcement field.

By introducing new HTML to the mall home page, you can potentially add major new elements to the mall home page that can enhance the shopping experience for your customers.

Home Page Tabs

Tabs are located below the splash image on the mall home page. These tabs provide customers with an easy way to navigate to specific stores or product categories.

The first tab is a simple list of all the stores in the mall.



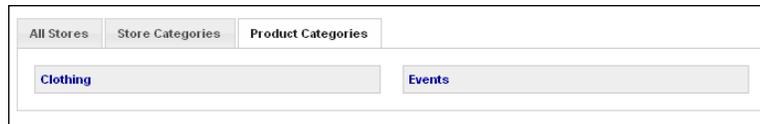
The All Stores tab is a list of all the stores created for the mall view.

The second tab, Store Categories, displays dropdown menus that can be used for navigating to stores within each category.



The Store Categories tab displays a dropdown menu for each store category.

The third tab, Product Categories is a simple list of all the product categories that have been created for the mall.



The Product Categories tab is a list of all the product categories.

Note: If no store categories have been created, you will not see this tab. Likewise, if no product categories have been created, you will not see this tab.

The system administrator is responsible for creating store categories and product categories that can be used by all the stores in the mall. Store categories can be configured on the Store Categories page in the System Administration section of the Operation Center:

System Administration > Settings > Store Categories

Product categories can be configured on the Product Categories page in the System Administration section of the Operation Center:

System Administration > Settings > Product Categories

The system administrator can create as many store categories or product categories as necessary for your campus's uStores mall.

About Building the Mall Home Page Tabs

All stores that are online will appear on the All Stores tab. All store categories for which stores have been assigned will appear on the Store Categories tab. And all product categories for which products have been assigned will appear on the Product Categories tab. Only top-level product categories will appear on the this tab (i.e., .sub-level product categories do not appear).

The Store Categories tab will not appear if no stores have been assigned to store categories or if no store categories have been created. Likewise, the Product Categories tab will not appear if no products have been assigned to product categories or if no product categories have been created.

As with the left navigation menu, we strongly recommend that 1) your Marketplace administrator create both store categories and product categories and 2) your store managers assign their stores to these store categories and their products to the product categories. By taking these actions, you will help build content for the mall home page tabs and provide your shoppers with more navigation options.

Important! If you DO NOT create categories and assign stores and products to these categories, the mall home page tabs will not appear, except for the All Stores tab.

Mall Style Sheets

Many schools that use Marketplace decide to modify the look and feel of the uStores mall so that it resembles existing campus web sites. Typically, this involves using school colors and approved fonts so that a consistent look and feel is maintained as customers navigate from a campus portal web site to Marketplace.

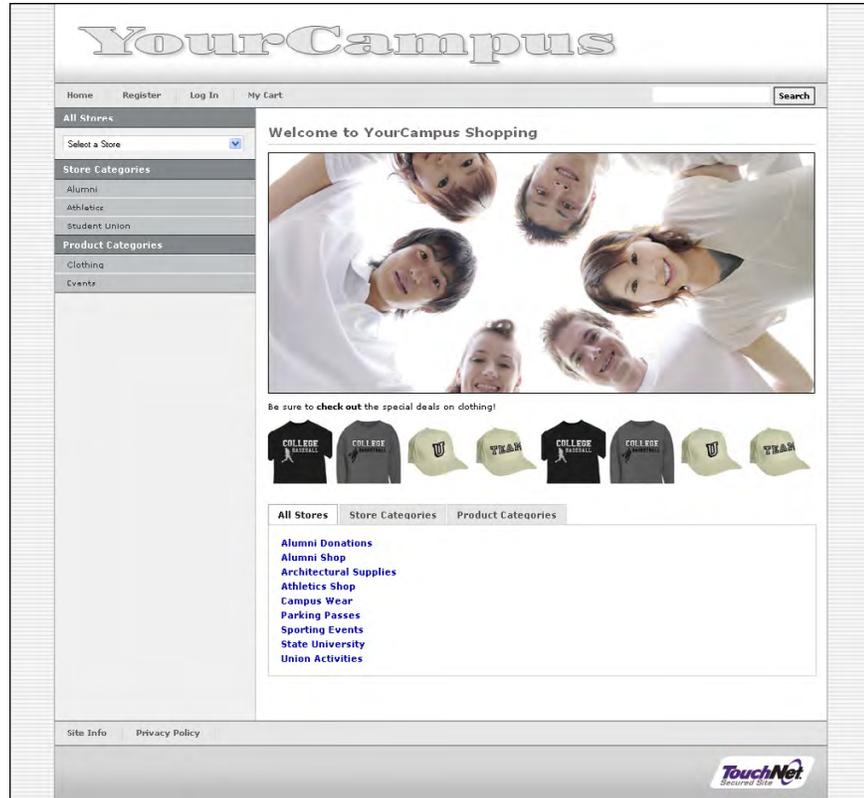
By editing the Marketplace style sheet, you can take greater control of how the uStores mall is displayed. For example, you can choose whether the site should be centered or left justified. You can choose whether the header and footer should span the entire browser window or be limited to a set pixel width. You can change background colors, font families, font sizes, link colors, and many other page elements.

Important! Any major changes to the mall style sheets should be performed by an experienced web designer. Faulty CSS code can cause the mall to stop loading correctly in the web browsers of your customers.

System administrators can download and upload style sheets that determine the look-and-feel of the uStores mall by using the Mall Style Sheet Settings page in the System Administration section of the Operation Center:

System Administration > Settings > Style Sheets

Here is an example of a mall that has been customized with style sheet changes. Compare this example with the mall example from earlier in this section.



Notice how some of the background colors have been changed in this example.

Here is a list of some of the changes that can be made to the look-and-feel of the uStores mall through style sheet changes:

Modifying site layout

- Using a centered layout
- Using a left-justified layout
- Modifying the width of the content areas

Modifying background colors

- Modifying the header background color
- Modifying the footer background color
- Modifying the background color of the top navigation menu
- Modifying the background color of the left navigation buttons

- Modifying the background color of the bottom navigation menu
- Modifying the main content background color
- Modifying the margin colors
- Modifying the width and color of borders

Modifying link colors

- Modifying the link color used in the breadcrumbs
- Modifying the link color used in the top and bottom navigation menus
- Modifying the link color used in the main content area
- Modifying the link color used in the footer

This is a small sampling of the types of changes that can be accomplished by making style sheet changes. More advanced users with experience coding CSS can make more far reaching changes to the mall's look and feel, particularly when combining customized CSS with customized HTML (as is allowed with the special announcement field).

For more information about editing style sheets, see the *Marketplace uStores Layout Guide*.

2.3 What Shoppers See: Product Categories

There are two types of product categories in Marketplace:

- Mall-level product categories — These product categories appear in the left navigation menu and include products from all stores in the mall.
- Store-level product categories — These product categories appear within individual stores. Each store has its own set of product categories. The product categories for a single store only show products for that one store.

Product categories can be used to help organize products in ways that can be valuable to shoppers and help them quickly find the products that they desire. Instead of going to a specific store and then browsing the products that it offers, the shopper can select a product category that fits their needs and then view the products in that category.

In this section, we'll discuss mall-level product categories. We'll discuss store-level product categories in **"What Shoppers See: Stores" on page 61**.

Product Categories Layout

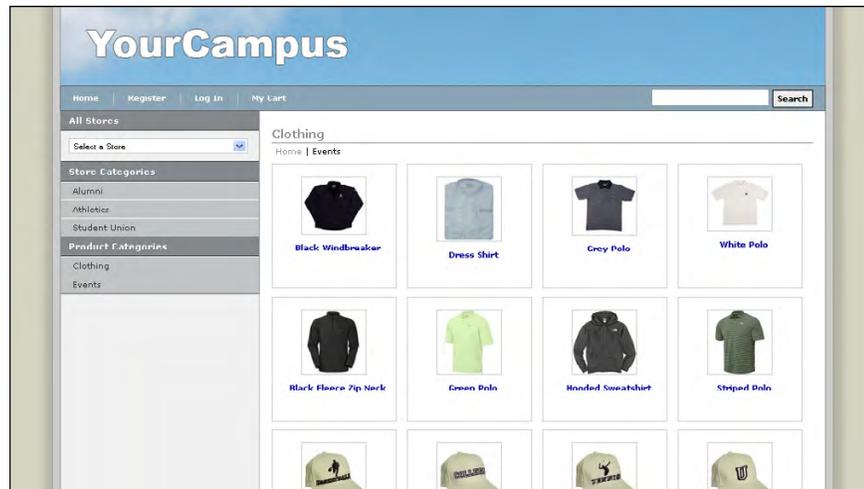
Administrators can create mall-level product categories that can be used for all stores in the uStores mall. For example, all clothing products, regardless of the stores, can be placed in a category called "Apparel." Or all campus events (sporting events, seminars, theatrical productions, etc.) can be placed in a category called "Events."

Mall-level product categories can be configured on the Product Categories page in the System Administration section of the Operation Center:

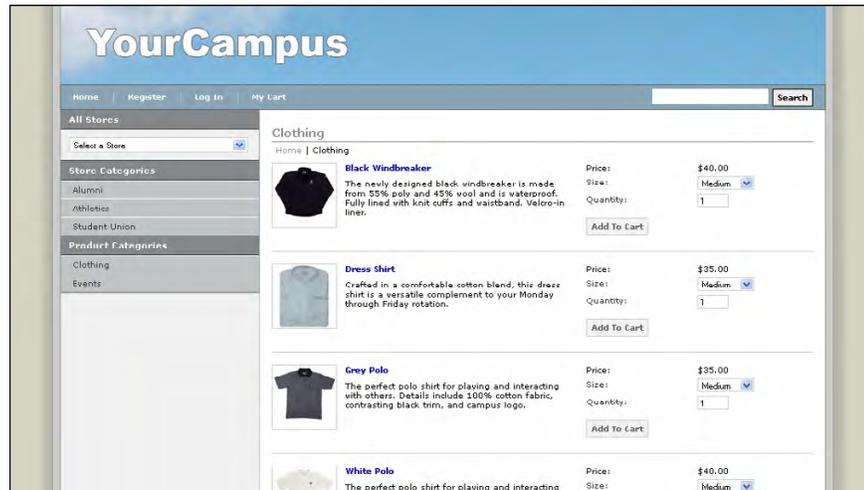
System Administration > Settings > Product Categories

Product categories are displayed on product category pages in the uStores mall. Three layout options are available for product category pages: 1) the thumbnails option displays a product thumbnail image (and a name) for each product in the category, 2) the detailed option displays product thumbnails with accompanying short product descriptions, prices, and option menus (plus the Add to Cart button appears for each product), and 3) the name-and-price layout option displays a table that includes rows for each product (which show the product names and prices).

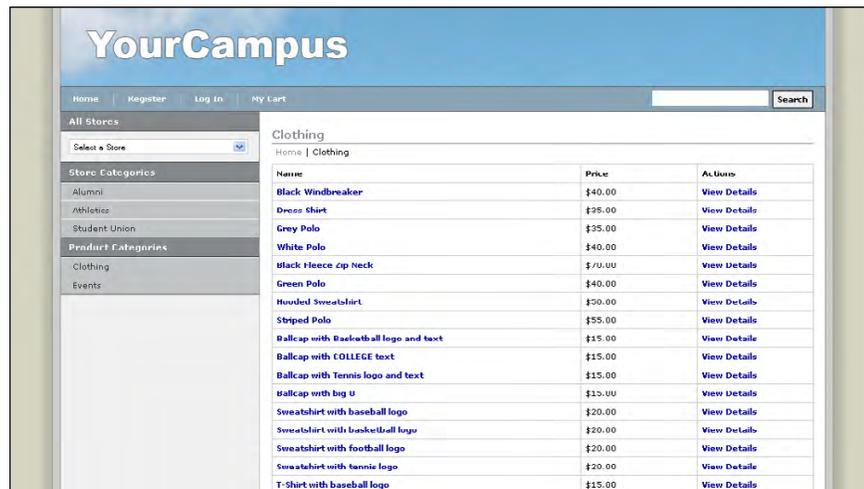
The following examples show the three layout options for the product category pages:



The thumbnails layout for a sample product category page.



The detailed layout for a sample product category page.



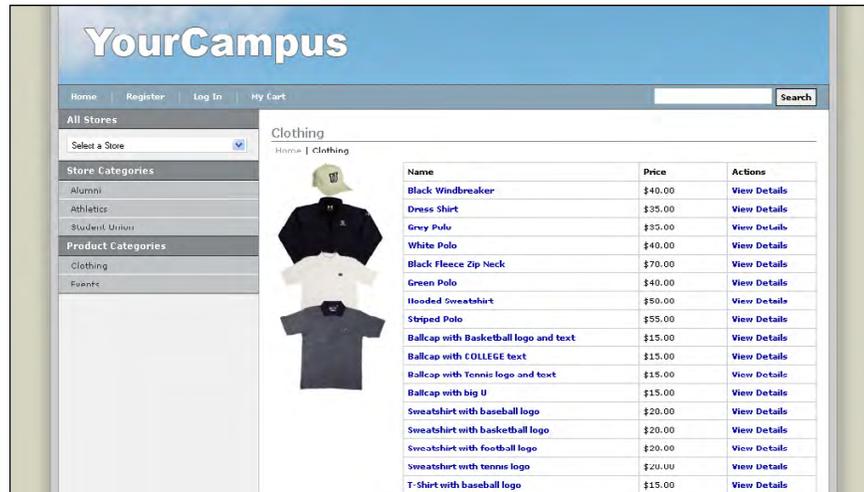
The name-and-price layout for a sample product category page.

Using a Product Category Side Banner

In addition to the layout options described above, product category pages can be configured to display a side banner. This image will appear to the left of the products.

We recommend that you be careful using the product category side banner because it reduces the real estate afforded thumbnails and product descriptions. Product category pages can also look out of balance and chaotic when poorly designed side banners are used with category pages. We recommend relatively simple images. Category side banners work well with the name-and-price layout.

Here is an example of a category side banner used with the name-and-price layout.



When used with the name-and-price layout, a category side banner can help create an appealing design.

The name-and-price layout doesn't use images for the products, so by using a category banner you can give customers a peek at some of the products within a category while also deriving the benefits of the condensed layout afforded by the tabular display of product names and prices. This layout option works especially well with large numbers of products, in which the display of large numbers of thumbnails might delay the display of a product category page (as each image downloads to the shopper's browser).

Note: By default, category banners can be no larger than 150 pixels wide by 300 pixels high.

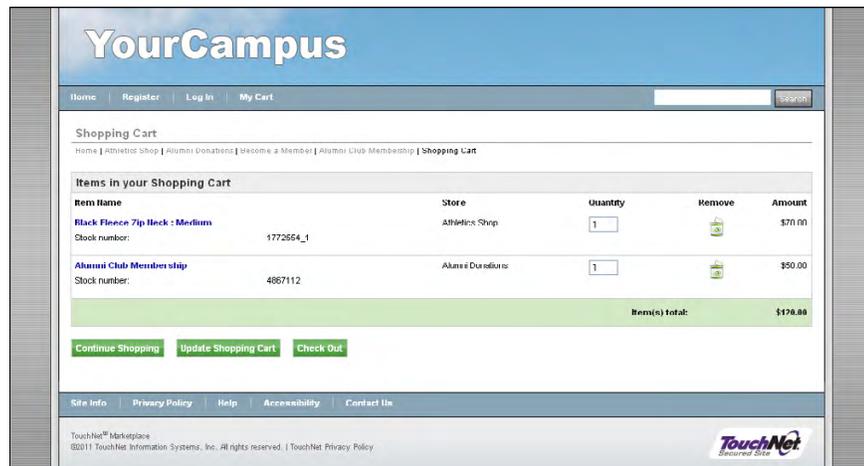
2.4 What Shoppers See: The Cart

The shopping cart and checkout pages share some of the same layout as the mall. The mall header image appears, the top navigation bar appears, and the footer appears. Many of the same background image and colors still apply. But the left navigation menu no longer appears once customers are in the shopping cart and checkout.

The Shopping Cart

The shopping cart shows shoppers the items that they are considering purchasing. A table displays each product that has been added to the shopping cart. Each product appears in a separate table row that displays item name, item options, store name, quantity and dollar amount.

Here is a sample shopping cart page:

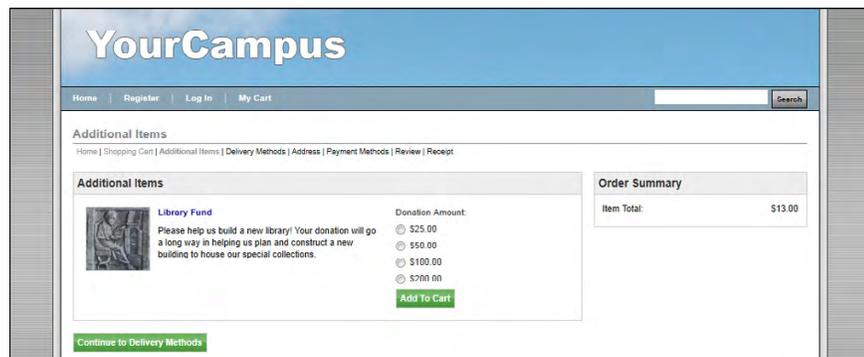


The shopping cart page contains many of the same design elements as the mall.

The layout of the shopping cart can only be changed via modifications to the style sheet that governs the cart and checkout style sheets. There are no elements on these pages that can be changed with the Marketplace Operations Center—except for stores in single-store mode.

The Checkout Pages

The checkout pages lead shoppers through the process of purchasing items from your Marketplace stores. Here are the main pages that are part of the checkout process, with notes on situations in which the pages will not appear.



The Additional Items page.

Additional Items page—By offering your shoppers additional items during checkout, you can help increase revenue by bringing special items to the attention of your customers. These items appear on the Additional Items page. This page will only appear if the cart contains products from a store that has been configured with one or more "additional items." (For information about configuring products to serve as additional items, see ["Editing Products" on page 283.](#))

The Delivery Method page.

Delivery Methods page—This page allows the shopper to choose a delivery method for each item in their shopping cart. For orders that require no shipping (such as digital products), the Delivery Methods page is skipped.

The Delivery Address page.

Delivery Address page—The Delivery Address page will always appear; however, if no shipping is required, this page will only ask for the shopper's e-mail address. An e-mail address is always required for Marketplace transactions.

YourCampus

Home | Register | Log In | My Cart

Payment Methods

Home | Shopping Cart | Delivery Methods | Address | Payment Methods | Review | Receipt

Payment Method

Use the table below to select the payment methods for the Order Items. After you select the payment methods for your Order Items, you can fill in the rest of the payment information by choosing the Continue button.

	INTERAC	MasterCard	Visa	Electronic Check
Black Fleece Zip Neck : Medium	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Alumni Club Membership	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

[Continue](#)

Electronic Check - Electronic payments require a bank routing number and account number. Payments can be made from a personal checking or savings account. No corporate checks allowed, i.e. credit cards, home equity, traveler's checks, etc.
Credit Card - Available credit card issuers.

INTERAC Online® - The INTERAC Online service allows you to pay directly from your bank account.

®Trade-mark of INTERAC Inc. Used under licence.*

Order Summary

Item(s) Total:	\$120.00
Delivery Charge:	\$5.00
Tax:	\$0.00
Order total:	\$125.00

Delivery Address

John Doe
1515 Main St.
Lenexa, KS 66219
United States

[Change Delivery Address](#)

Promotional Code

You can use one code per Shopping Cart.

[Apply](#)

The Payment Method page.

Payment Method page—This page allows the shopper to choose a payment method for each item in their shopping cart. For orders that only contain items priced at zero, the Payment Method page will be skipped.

YourCampus

Home | Register | Log In | My Cart

Payment Methods

Home | Shopping Cart | Delivery Methods | Address | Payment Methods | Review | Receipt

Payment Information

The below items are being paid for with a Visa payment method.

Item	Store	Payment Method
Black Fleece Zip Neck : Medium	Athletics Shop	Visa
Alumni Club Membership	Alumni Donations	Visa

Account Information

Verify or enter required account information.

* Credit Card Type: Visa *Indicates required information

* Credit Card Number:

* Expiration Date: 03 2011

Billing Address

Verify or enter address information for account.

Use current delivery address as billing address. *Indicates required information

* Name: John Doe

* Address Line 1: 1515 Main St.

Address Line 2:

* City: Lenexa

* State: Kansas

* Zip / Postal Code: 66219

* Country: United States

[Continue](#)

Order Summary

Item(s) Total:	\$120.00
Delivery Charge:	\$5.00
Tax:	\$0.00
Order total:	\$125.00

Delivery Address

John Doe
1515 Main St.
Lenexa, KS 66219
United States

[Change Delivery Address](#)

Promotional Code

You can use one code per Shopping Cart.

[Apply](#)

The Payment Information Page.

Payment Information page—This page allows the shopper to enter payment information for each payment method chosen on the Payment Method

page. For orders that only contain items priced at zero, the Payment Information page will be skipped.

Item(s) Total	\$444.00
Tax	\$0.00
Order total	\$444.00

The Buyer Information Page.

Buyer Information page—This page contains fields that are customizable by each store. These fields allow stores to acquire additional information from the buyer in the form of required menu selections, text entries, and optional checkboxes selections. The Buyer Info page only appears if the cart contains products from a store that has been configured to ask for "user modifiers." (For information about configuring stores to ask for "user modifiers," see ["User Modifiers \(Buyer Info\)" on page 230.](#))

Item(s) total	\$120.00
Delivery Charge	\$5.00
Tax	\$0.00
Order Total	\$125.00

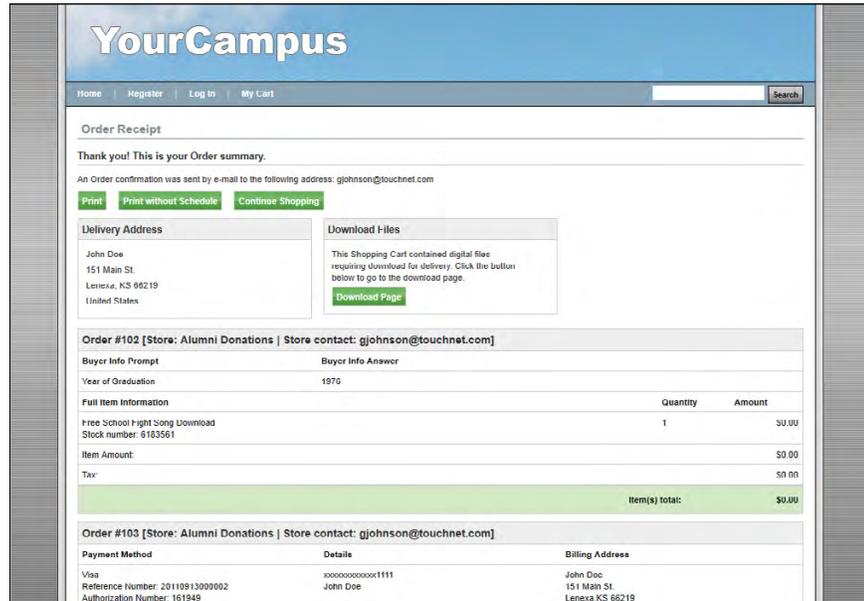
Address:	John Doe 1515 Main St. Lenexa, KS 66219 United States
Email Address:	johnson@touscnet.com

Payment Method	Details	Billing Address	Payment Summary										
Visa	XXXXXXXXXXXX1111	John Doe 1515 Main St Lenexa, KS 66219 United States	<table border="1"> <tr> <td>Deck Fleece Zip Neck - Medium</td> <td>\$70.00</td> </tr> <tr> <td>Item Total</td> <td>\$70.00</td> </tr> <tr> <td>Delivery Charge</td> <td>\$5.00</td> </tr> <tr> <td>Tax</td> <td>\$0.00</td> </tr> <tr> <td>Payment Total</td> <td>\$75.00</td> </tr> </table>	Deck Fleece Zip Neck - Medium	\$70.00	Item Total	\$70.00	Delivery Charge	\$5.00	Tax	\$0.00	Payment Total	\$75.00
Deck Fleece Zip Neck - Medium	\$70.00												
Item Total	\$70.00												
Delivery Charge	\$5.00												
Tax	\$0.00												
Payment Total	\$75.00												

The Review Order page.

Review Order page—This page summarizes the order information and allows the buyer an opportunity to confirm that the information is correct. The buyer is given the opportunity to change the delivery address and to

edit the payment method information. In addition, users can view the return policy agreement. This page always appears during the checkout process.



The Order Receipt page.

Order Receipt page—The receipt page summarizes all the information for the order. If a recurring payment schedule was established for a donation, this schedule appears on the receipt. If the shopper purchased a digital product, a link to a "Download Page" also appears.



The Digital Download page.

Digital Download page—At the conclusion of the checkout process, buyers who have purchased a digital product can use the Digital Download page to download this item.

2.5 What Shoppers See: My Account

Shoppers in Marketplace uStores have the option of becoming registered users. The Register link appears in the top navigation bar and appears on all pages throughout the uStores mall. Shoppers are also given the option of becoming registered users during the checkout process.

Once registered, customers can save personal information, such as shipping addresses and payment methods. In addition, customers can view their order history and get detailed information on each order. For each customer, this suite of personal information pages and order history pages is known as "My Account."

Registering

Customers become registered users by clicking the Register link in the top navigation menu and completing the fields on the Create an Account page.

The screenshot shows the 'YourCampus' website's 'Create an Account' page. The page has a blue header with the 'YourCampus' logo and a navigation menu with 'Home', 'Register', 'Log In', and 'My Cart'. A search bar is located in the top right. The main content area is titled 'Create an Account' and is divided into three sections: 'Create User Name and Password', 'Your Name and E-mail Address', and 'Specify a Default Address (Optional)'. The 'Create User Name and Password' section includes fields for Username (must be at least 4 characters), Password (6 to 20 characters with at least one number), Confirm password, and Password hint. The 'Your Name and E-mail Address' section includes a Prefix dropdown, First name, Middle name, Last name, Suffix, and Email address fields. The 'Specify a Default Address (Optional)' section includes Address one, Address two, City, State/Province (set to Kansas), Zip/Postal Code, and Country (set to United States) fields. A 'Create Account' button is at the bottom of the form. The footer contains 'Site Info' and 'Privacy Policy' links, and the TouchNet logo.

The Create an Account page.

After customers have become registered users, they can login and view personal information and order history. Customers login by clicking the Log In link in the top navigation menu, at which point the following page appears:

The Registered User Login page.

Customers are also given the opportunity to register or login during the checkout process.

During checkout, registered users can login by using the fields in the Registered Users box in the far right column of the Delivery Address page. Also during checkout, new users can become registered users by clicking the Register Now button in the far right column.

My Account: Profile

Customers can store the following personal information on their profile page:

- e-mail address
- text message address
- billing address (including telephone numbers)
- shipping addresses (multiple shipping addresses can be saved)

Here is a sample Profile page:

YourCampus

Home | Log Out | My Account | My Cart

My Account

Welcome Gary
Thanks for logging in. You can manage your account here or continue shopping.

[Continue Shopping](#)

Profile | Payment Methods | Memberships | Order History | Change Password

Email Address

Current E-mail Address: gjonson@touchnet.com
New E-mail Address:

[Update Email Address](#)

Text Message

Text Message Number: (555-555-5555)
Mobile Carrier:

* To get optional text messages about orders, enter your mobile phone number and carrier.
* Reminder: Messages may be sent during overnight hours and your carrier may charge a fee to receive text messages.

[Update Text Message](#)

Billing Address

Prefix: City:
* First Name: * State/Province:
Middle Name: * Zip/Postal Code:
* Last Name: * Country:
Suffix: Phone Number (Day): (555-555-5555)
* Address Line 1: Phone Number (Night):
Address Line 2: Phone Number (Mobile):

[Update Billing Address](#)

Shipping Addresses

Current Shipping Addresses

Profile name: work
Recipient name: Gary Johnson
Recipient address: 15520 College Blvd., Lenexa, KS, 66210 US
[Edit](#) | [Delete](#)

Add New Shipping Address

Prefix:
* First Name:
Middle Name:
* Last Name:
Suffix:
* Address Line 1:
Address Line 2:
* City:
* State/Province:
* Zip/Postal Code:
* Country:
* Name This Address (ex: Work):

[Add](#)

Site Info | Privacy Policy | Help | Accessibility | Contact Us

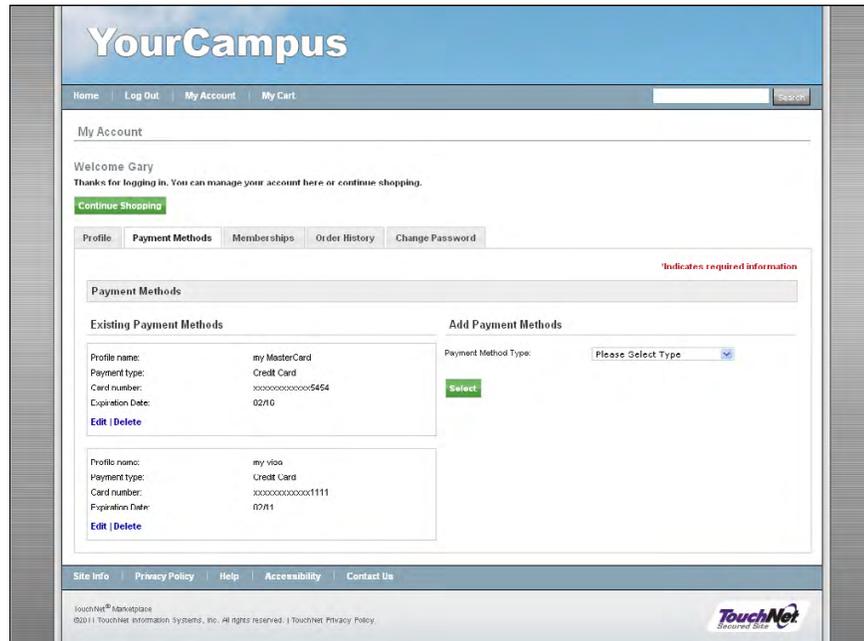
TouchNet® Marketplace
©2011 TouchNet Information Systems, Inc. All rights reserved. | TouchNet Privacy Policy

TouchNet
Member Since 2002

The Profile tab on the My Account page displays shipping address, billing address, text message address, and e-mail address.

My Account: Payment Methods

In addition to personal information, customers can save payment information to their My Account profile. This payment information can be for credit card transactions and bank account ACH transfers.

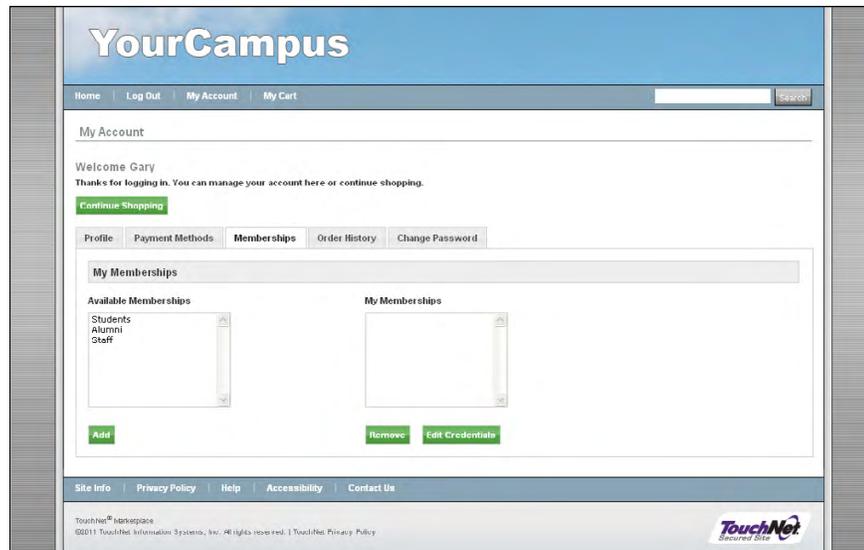


The Payment Methods tab on the My Account page.

To help ensure user security, Marketplace does not display the complete credit card number or bank account after it has been initially entered.

My Account: Memberships

Once a shopper has become a registered user, they can add a group membership to their account by navigating to the Memberships tab in My Account. The shopper can then select add a membership by selecting a user group listed in the Available Memberships list box and then clicking the Add button.



The Memberships tab on the My Account page.

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 page appears, which requires the user to enter a username and password for the group.

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 private 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.

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 from which to choose.

To help ensure user security, Marketplace does not display the complete credit card number or bank account after it has been initially entered.

My Account: Order History

The Order History page displays the order number, order date, and status of each order. The order number is a link that the customer can click to view detailed order information on each order. This information appears on the Order History Detail page.

Order Number	Order Date	Status
57	2/23/11 9:13 AM	Cancelled
56	2/23/11 9:13 AM	Complete
55	2/23/11 9:12 AM	Complete

The Order History tab on the My Account page.

YourCampus

Home | Log Out | My Account | My Cart

Order History Detail

[Back to Order history](#) [Continue Shopping](#)

Order Details

Description	Information
Order ID:	56
Order Date:	2/23/11, 9:13 AM
Buyer:	Gary Johnson 15520 College Blvd Lenexa, KS 66219 United States gjohnson@touchnet.com
Payment Method:	Credit Card: Visa
Return Policy:	

Shipping Details

Shipment ID:	59
Delivery Method:	None
Shipping Address:	Gary Johnson 15520 College Blvd Lenexa, KS 66219 United States

Item Details

Description	Stock No.	Quantity	Not Fulfilled	Cancelled	Returned	Price
Scholar Fund	4443021	1	0	0	0	\$444.00

Totals

Description	Amount
Items:	\$444.00
Shipping:	\$0.00
Taxes:	\$0.00
Grand Total:	\$444.00

Site Info | Privacy Policy | Help | Accessibility | Contact Us

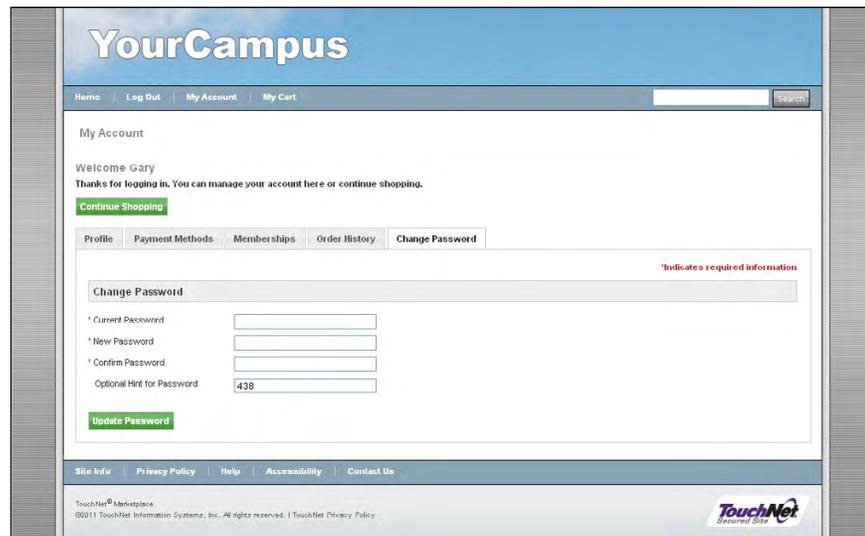
TouchNet® Marketplace
©2011 TouchNet Information Systems, Inc. All rights reserved. | TouchNet Privacy Policy

TouchNet
Marketplace

The Order History Detail page gives detailed information on past orders.

My Account: Change Password

Registered customers can change their passwords by navigating to the Change Password tab of the My Account page.



The Payment Methods tab on the My Account page.

To change their password, the customer must enter their current password as well as a new password (which must be confirmed). Passwords must be 6 to 20 characters long.

2.6 What Shoppers See: Stores

The layout for stores closely follows the look of the mall in most respects. The same stylesheets are used and the same header image is used (except for stores in single-store mode). The left navigation menu and top navigation menu work as in the mall. However, the layout for stores has additional options. For example, stores can use a side banner. In addition, the announcements field provides a means of adding new HTML to store home pages.

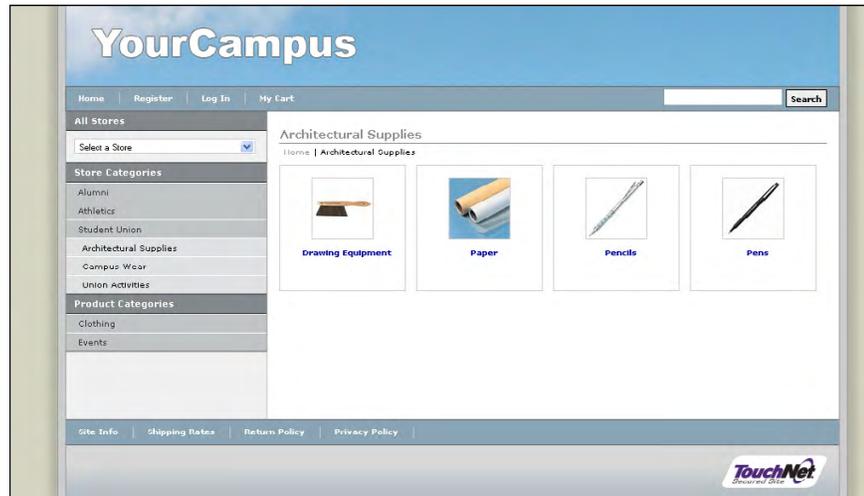
Store Layout

Store managers can choose from two layout options: 1) the default layout uses a thumbnail grid display for top-level products and categories and 2) a splash page layout combines the use of a large splash page image with text links for the categories within the store.

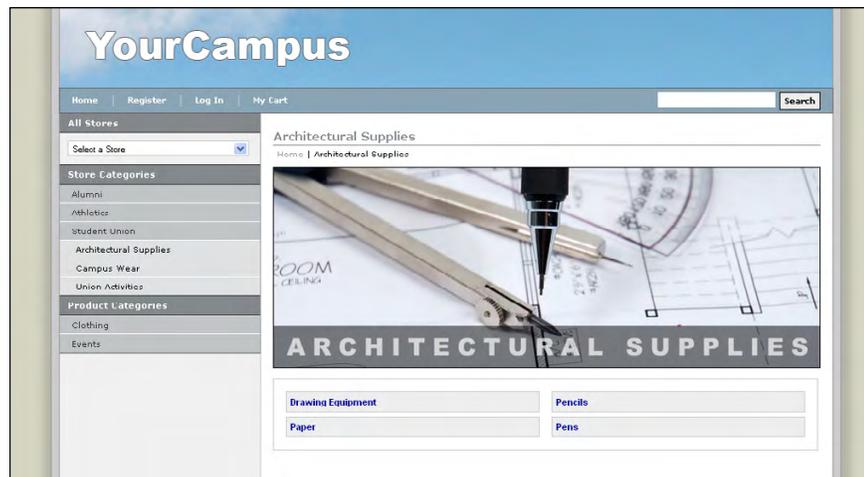
Store layout is configured on the Store General Settings page for each store:

[merchant name] > Stores > [store name] > Store Settings > General

The following examples show the two layout options for stores:



The default store layout displays thumbnails for each store product category on the store home page. Select products can also be displayed as thumbnails on the store home page.



The splash page layout combines a splash page image with text links for store product categories.

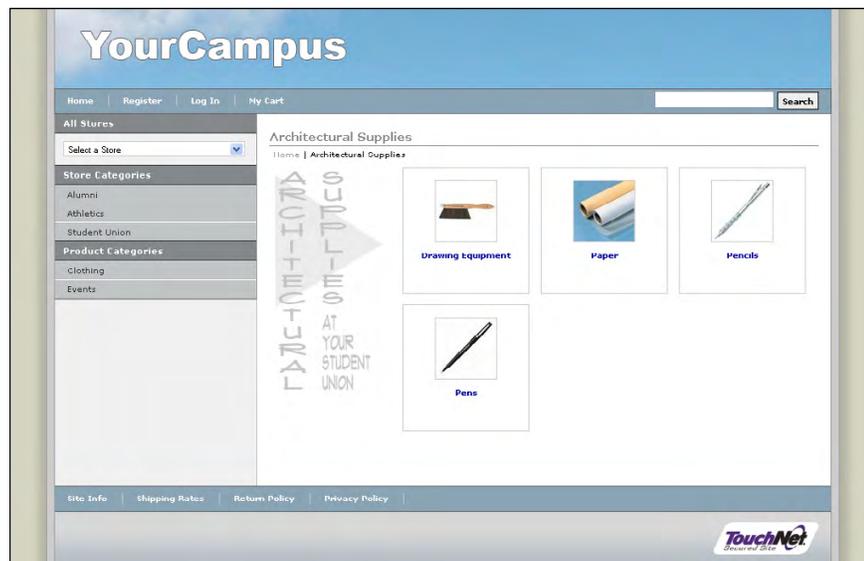
The default layout display of thumbnails is great if you have a small number of products because it allows you to display BOTH products and categories together on the store home page. However, the splash page layout only allows store product categories to be displayed in addition to the splash image, and therefore if you use the splash page layout for your store's home page, you MUST create categories for your store products because the links for the categories will be the ONLY means that shoppers have of navigating to your products (outside of using the mall's product categories or the mall's search functionality).

Using a Store Side Banner

In addition to the layout options described above, stores can be configured to display a store side banner. This image will appear to the left of the products on all pages in a store, with these exceptions: 1) the store banner image will not appear on the splash page, if the splash page layout is used and 2) the store side banner will be replaced on category pages if a side banner has been uploaded for a store product category.

We recommend that you be careful using the store side banner because it reduces the real estate afforded the product information. Store pages can also easily look out of balance and chaotic when poorly designed store side banners are used. We recommend you use relatively simple images.

Here is an example of a store side banner on a store home page.



The Store side banner appears to the left of products and categories.

We recommend you avoid using large photos or blocks of color in the store side banners because this will make the side banners compete for attention with the product thumbnail images, possibly creating a chaotic page design. We recommend using a store side banner with the same color background as the rest of the page, thus allowing the store side banner to flow into the page design and become less intrusive.

By default, store side banners can be no larger than 150 pixels wide by 300 pixels high.

Store Product Categories

Store managers can create product categories within a store. These categories are independent from the mall product categories, which are available for all stores. Store product categories exist to categorize products within an individual store. For example, a clothing store might separate t-shirts into one category, sweatshirts into another category, and ballcaps into a third category.

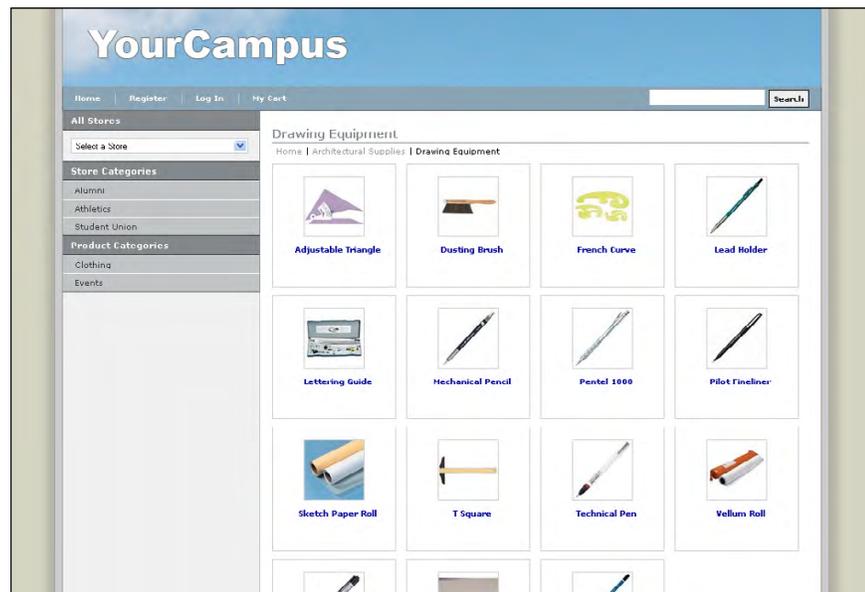
Three layout options are available for determining how the products within a category will be displayed: 1) a thumbnails option displays each product thumbnail image and the product name, 2) the detailed option displays product thumbnails with accompanying short product descriptions, prices, and option menus (plus the Add to Cart button appears for each product), and 3) the name-and-price layout option displays a table that includes rows for each product (which show the product names and prices).

Store product categories are a great way to group products in relevant ways for your shoppers. If you have only a few products, categories might not be important. Keep in mind, however, that if you use the splash page layout for your store's home page you **MUST** create categories because the links for store product categories will be the **ONLY** means of shoppers navigating to your products from the store home page.

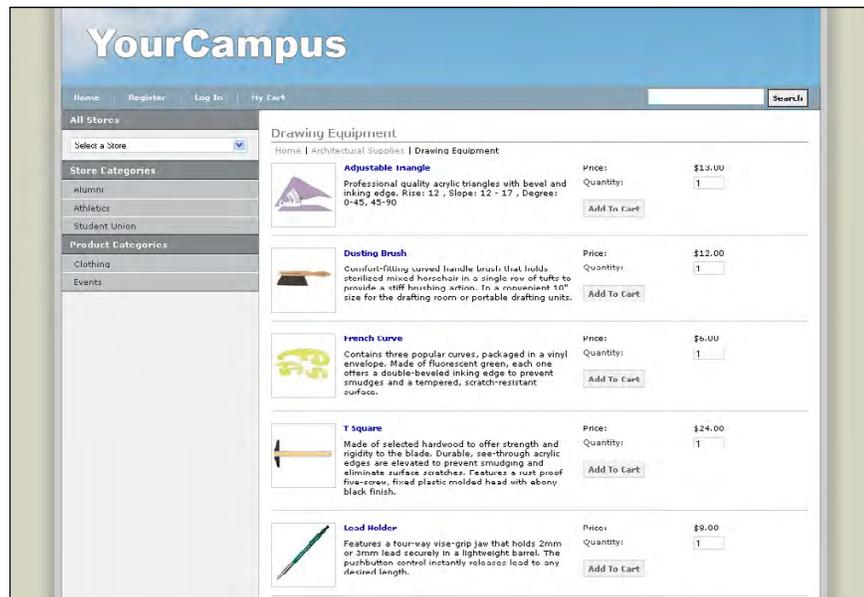
The layout for store product categories is configured on the Store Category Settings for each store:

[merchant name] > Stores > [store name] > Store Settings > Categories

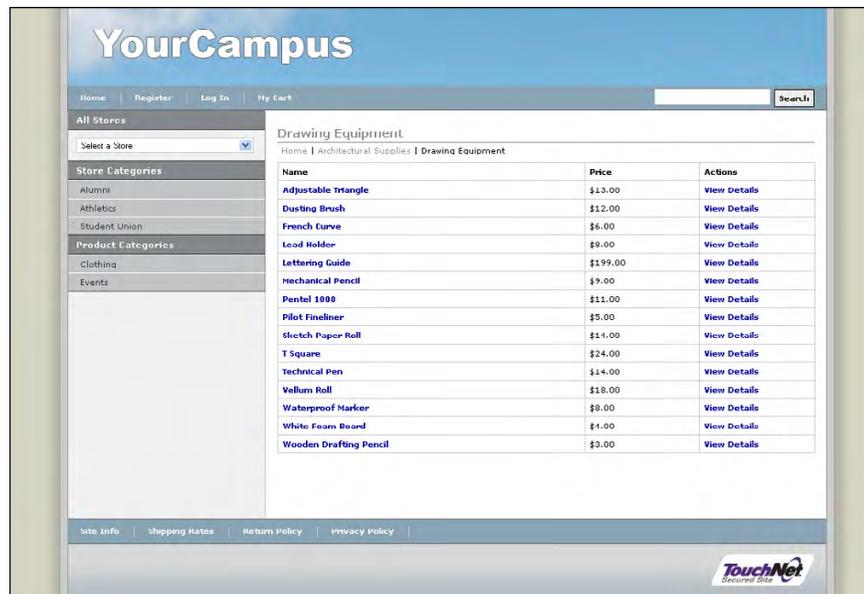
The following examples show the three layout options for the store category product pages:



The thumbnails layout for a sample store product category page.



The detailed layout for a sample store product category page.



The name-and-price layout for a sample store product category page.

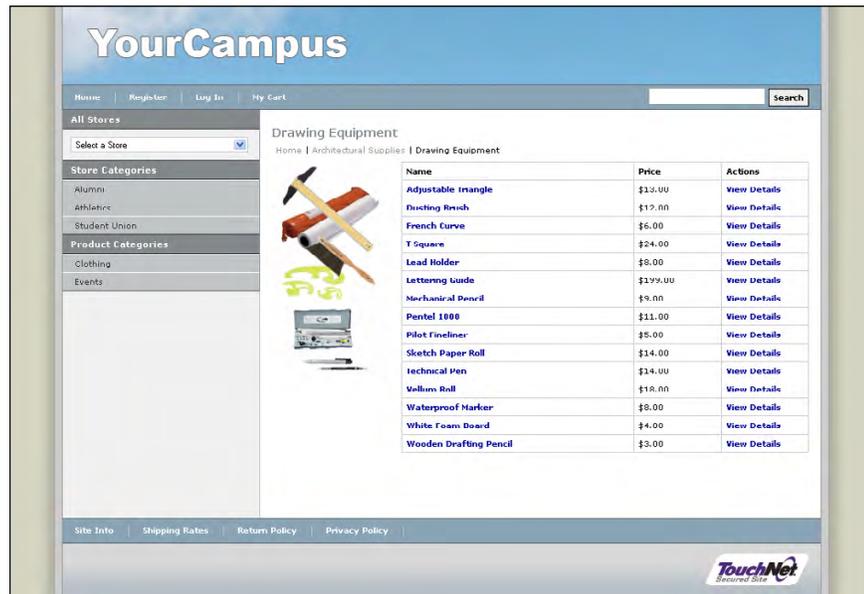
Using a Category Side Banner

In addition to the layout options described above, store product categories can be configured to display a category side banner. This side banner will appear to the left of the products.

We recommend that you be careful using the store product category side banner because it reduces the real estate afforded thumbnails and product

descriptions. Store product category pages can also easily look out of balance and chaotic when poorly designed category side banners are used. We recommend relatively simple images. Category side banners work quite well with the name-and-price layout.

Here is an example of a category side banner used with the name-and-price layout.



When used with the name-and-price layout, a category side banner can help create an appealing design.

The name-and-price layout doesn't use images for the products, so by using a category side banner you can give customers a peek at some of the products within a category while also deriving the benefits of the condensed layout afforded by the tabular display of product names and prices. This layout option works especially well with large numbers of products, in which the display of large numbers of thumbnails might delay the display of a product category page (as each image downloads to the shopper's browser).

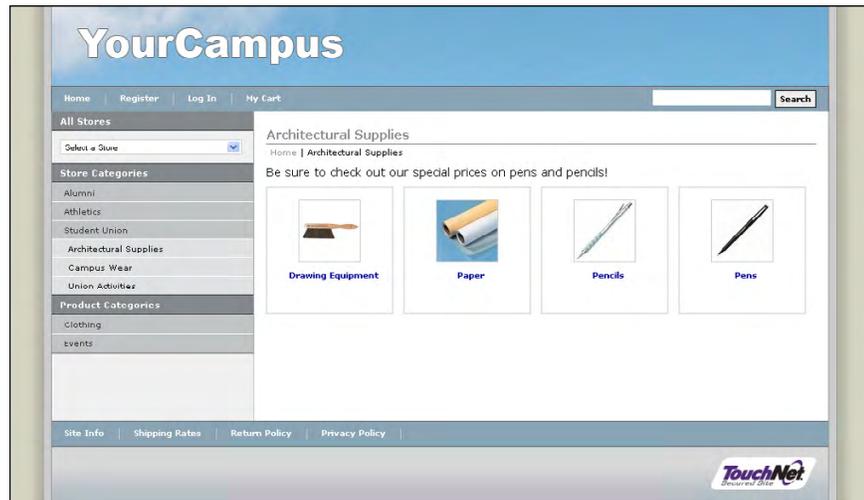
Category side banners only appear on category pages. Category side banners do not appear on product detail pages.

Note: By default, category side banners can be no larger than 150 pixels wide by 300 pixels high.

Store Announcement

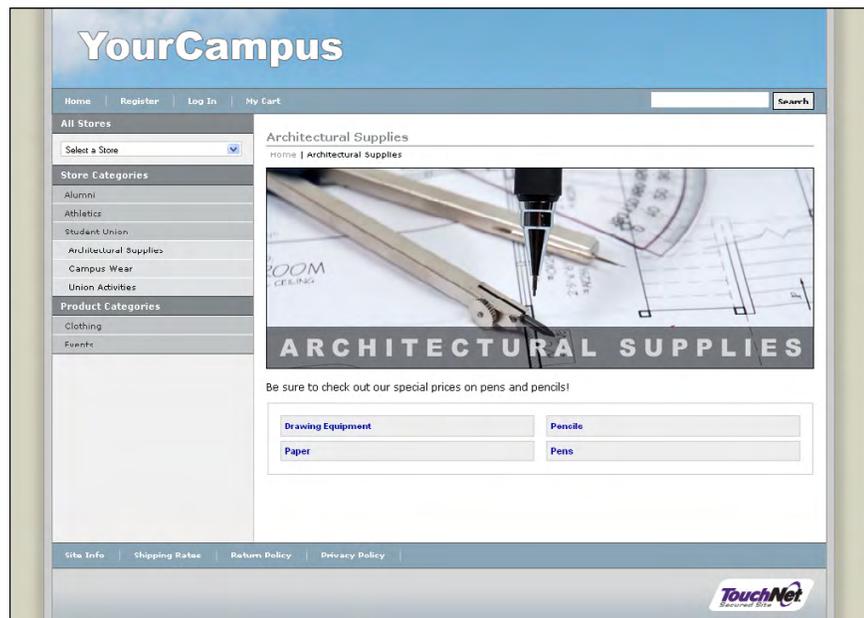
Stores have their own special announcement field (separate from the mall's special announcement field). With the default layout (which displayed top-level products and categories in a thumbnail grid), the special announcement appears below the breadcrumbs and above the thumbnails. With the store splash page layout, the special announcement appears below the splash image.

Here is an example of the special announcement appearing on the default store layout:



With the default store layout, the special announcement appears above the store and category thumbnails.

And here is an example of the special announcement appearing with the splash page layout:



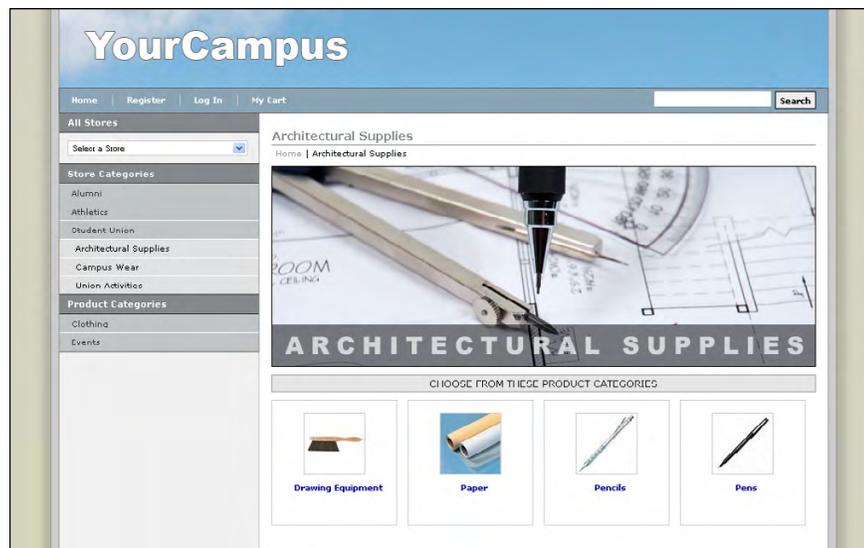
With the splash page layout, the special announcement appears below the splash image.

You can use the special announcement field to provide shoppers with key information about a store. For example, you can use this field to tell shoppers about a special shopping deal.

Using HTML with Special Announcements

The special announcement field accepts HTML. This presents many options for enhancing the look of announcements (such as adding bold text or changing the text color). Advanced users with experience coding HTML can even add additional design elements via the special announcement field (such as HTML tables or images).

Here is an example of a store home page in which HTML was used with the special announcement field and the default store layout (top-level products and categories as thumbnails). HTML was used to add an additional image—a splash page image—to the store home page and has combined this image with the standard thumbnail images:



In this example, the splash page image was added via the mall's special announcement field and combined with the category thumbnails that were provided with the default store layout.

By introducing new HTML to store home pages, you can potentially add major new elements to the store home pages that can enhance the shopping experience for your customers.

Bottom Navigation Menu for Stores

The bottom navigation menu for stores is similar to the menu displayed for the uStores mall; however, for stores, this menu contains two additional links: "Shipping Rates" and "Return Policy." Plus, the "Contact Us" link can be modified with the store contact e-mail address configured on the Store General Settings page.

Note: For information about the standard links that appear in the bottom navigation menu (Site Info, Privacy Policy, Help, Accessibility, and Contact Us), see "[Bottom Navigation Menu for the Mall](#)" on page 37.

Here is an example of the bottom navigation menu:



The bottom navigation menu for stores contains more links than the mall version.

The store-level bottom navigation menu links are described in the following tables:

Bottom Navigation Links: What Do They Look Like?

Link Name	Is the link optional?	Can the link text be customized?	Where can the link be configured?
Shipping Rates	Only for stores in single-store mode.	No	No link configuration.
Return Policy	Only for stores in single-store mode.	No	Enable button and link text field on Store General Settings page.
Contact Us	No	No	Each store can have it's own "Contact Us" e-mail address. This e-mail address can be configured with the Store Contact Email Address field on the Store General Settings page.

Bottom Navigation Links: What Do They Do?

Link Name	What happens when the link is selected?	Can the info page be edited?	Comments
Shipping Rates	A modal window appears that contains the Shipping Rates page.	Only by editing the shipping classes.	The Shipping Rates page is automatically generated and displays the shipping classes and rates. No additional content on this page is customizable.
Return Policy	A modal window appears that contains the Return Policy page.	The Return Policy page can be customized by using the Return Policy HTML field on the Store General Settings page.	The Return Policy page displays the active store's return policy. TouchNet strongly recommends that each store develop a return policy.
Contact Us	A new message is opened in the customer's default e-mail client	Not applicable.	When shoppers select the Contact Us link, their default e-mail software application will be launched so that the shopper can send a message to the contact e-mail address configured for the store. If a store contact e-mail address has NOT been configured for the store, the e-mail address configured for the mall will be used. If a contact e-mail address has not been configured for either the store or the mall, the "Contact Us" link will not appear.

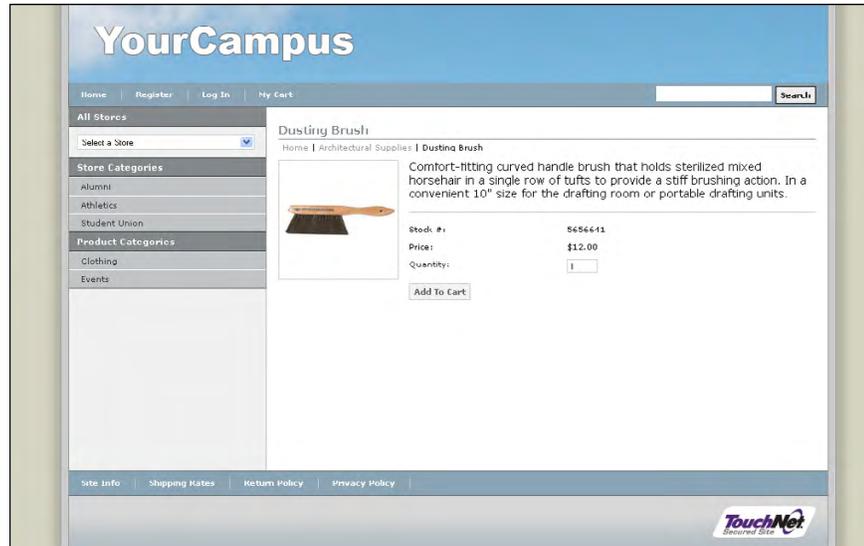
For information about the optional (and customizable) links in the bottom navigation menu for stores in single-store mode, see **"Optional Page Elements" on page 78**.

For information about modal windows, see ["Modal Windows" on page 41](#).

Product Layout

The layout of product detail pages closely follows the layout for the stores to which the products belong. In addition, a product image appears on each product detail page. By default, product images can be a maximum of 250 pixels wide by 250 pixels high. The product description (long description) appears to the right of the product image. This description can contain up to 30,000 characters.

Here is a sample product page:



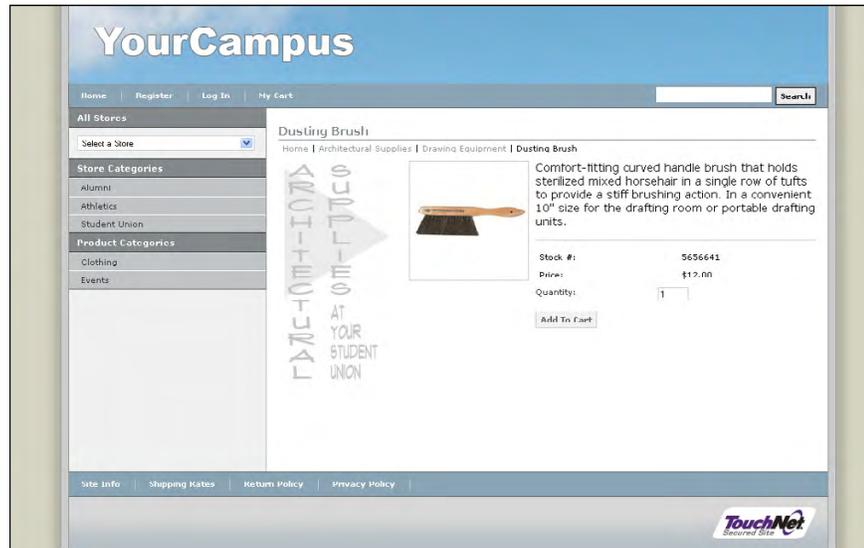
A product image appears to the left of the product description on the product detail pages.

If any product options are available, such as size or color, these options appear on the product page.

Using Store Banners

If the store has been configured to use a store banner, the banner will appear on the product pages. This banner appears to the left of the product image.

Here is a sample product page for a store in which a store banner has been configured:



If a store side banner is used, it appears to the left of the product image on the product detail pages.

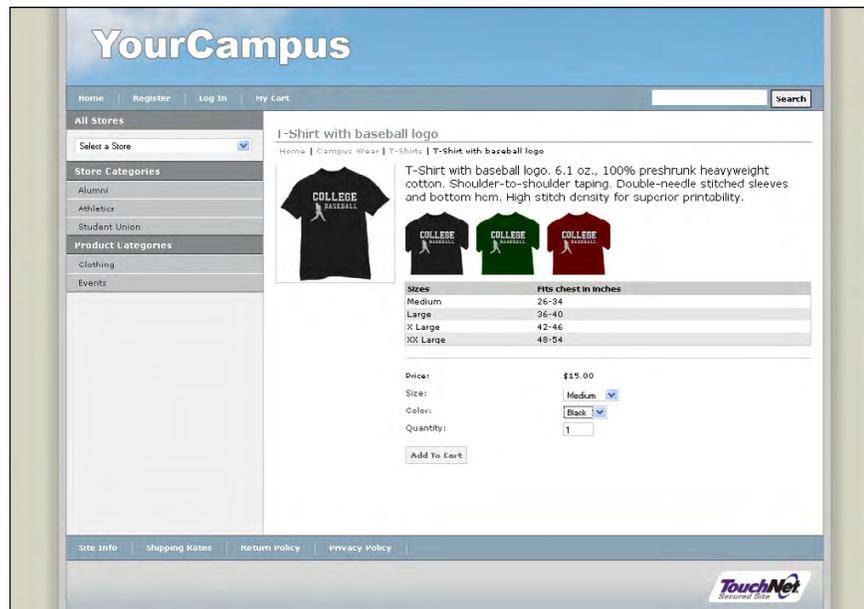
In the previous examples, notice how the product name appears in the title bar. The name of the store is reduced in size and appears in the breadcrumbs, so shoppers can use the breadcrumb links to backup to a category or the store home page.

If you would like to increase exposure of the store name on the product pages, you can configure the store to use a store banner; however, notice how a store banner takes up valuable horizontal real estate on the product pages. You will need to decide whether the use of a store banner is appropriate for your store.

Using HTML in the Product Description

The product description (long description) accepts HTML. This presents many options for enhancing the look of product pages (such as adding bold text or changing the text color). Advanced users with experience coding HTML can even add additional design elements via the long description field (such as HTML tables or images).

Here is an example of a product detail page that uses HTML in the product description.

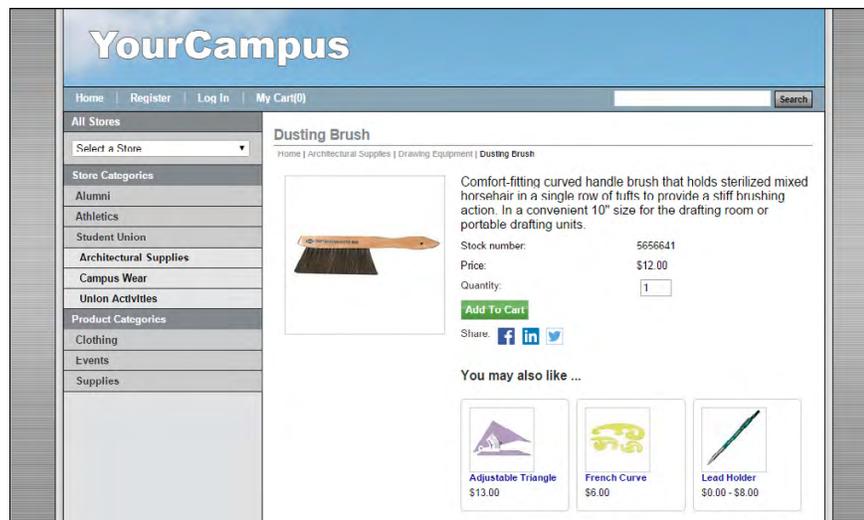


By using HTML in the product description, you can provide shoppers with more robust product information.

By introducing new HTML to a product page, you can provide shoppers with important additional information. In the example above, thumbnail images were used so shoppers would see samples of each color option. In addition, a table was added to provide information about the shirt sizes.

Related Products

For customers who view the Product Details page in uStores, the product can be configured to display links (and prices and thumbnails) for related products that the customer may also be interested in purchasing.



The Product Details page with related products.

Configuration for related products takes place on the Products page of the Marketplace Operation Center, as described in ["Using the Products Page" on page 276](#).

2.7 What Shoppers See: Single-Store Mode

Stores in the uStores mall must use the configuration and layout settings that have been established at the administrative level. However, stores may exist for a wide range of purposes and the mall configuration and layout might not always be appropriate for all stores. Some stores might exist to sell physical products, another might exist for conference registrations, and yet another might have been created for accepting alumni donations. These stores might require customized approaches that fit their intended audiences.

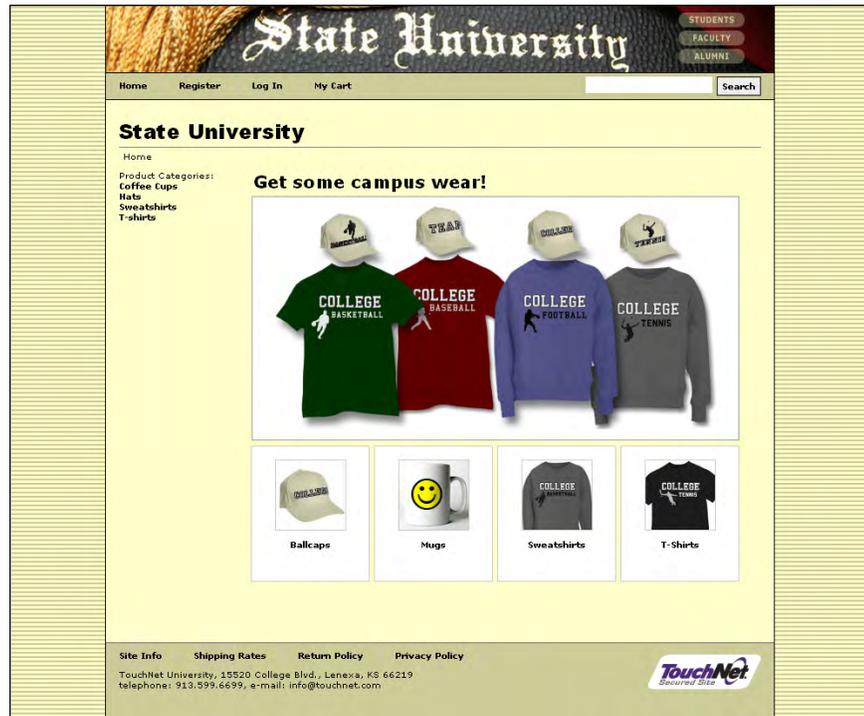
For example, maybe the term "shopping cart" doesn't work for a store that was established for taking alumni donations. Maybe you'd prefer to change the "Add to Cart" button to say "Make a Gift," and maybe you want to change the "Checkout" button to say "Complete Donations Now." These types of changes are possible for stores in single-store mode.

In addition, a store might have a branding strategy that is different than the strategy being used by the uStores mall. This strategy might involve using different fonts, different colors, and a different header image. This strategy might even involve making changes to the width of page elements or the position of those page elements. These types of changes are possible in single-store mode.

In this section, we'll discuss the options available in single-store mode that affect what shoppers see. Some of these options simply require the use of settings in the Marketplace Operations Center. Other options require advanced skills, such as knowledge of HTML and CSS.

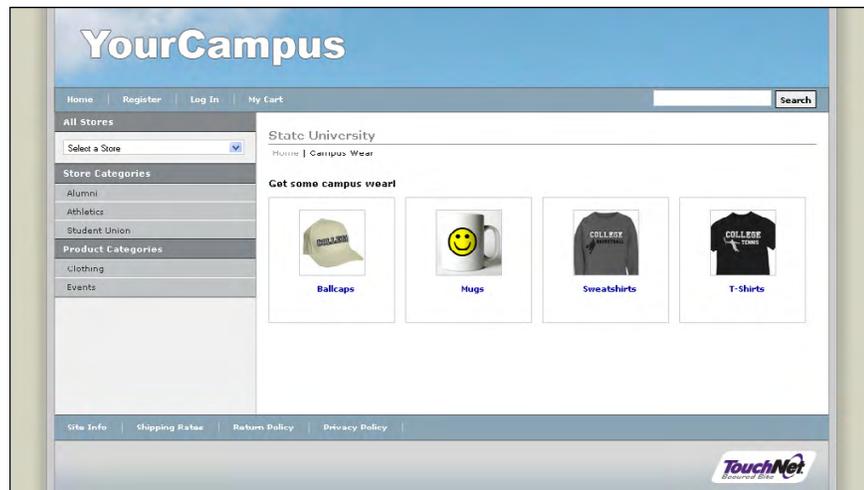
Single-Store Example

Here is an example of a store in single-store mode that has been customized for a branding strategy that is different than the campus's uStores mall:



This store is displayed in single-store mode.

Compare this store with the following store, which appears as part of the campus's uStores mall:



This store is part of the uStores mall.

Notice how different colors and images have been used for the store in single-store mode. These modifications were accomplished with a combination of style sheet edits and the use of extra HTML.

Store managers may opt to take this approach in order to maintain the branding that store customers are accustomed to seeing. This branding may include the use of specific header images, font families, font sizes, font

colors, background colors, and background images. Even additional page HTML and images may be necessary to maintain store branding requirements. These types of customizations are possible when using Marketplace's single-store mode.

Navigating to Stores in Single-Store Mode

Stores in single-store mode do not appear as part of the uStores mall (unless the Store-Is-Viewable-In-Mall option has also been turned on). These stores do NOT appear in the mall's left navigation menu, they do NOT appear in the All Stores dropdown menu on the uStores mall home page, and they do NOT appear on the All Stores tab on the mall home page. In addition, the products for these stores cannot be placed in mall product categories, and the products cannot be located using the mall's search functionality.

For customers to navigate to stores that have been set up in single-store mode, you will need to provide them with the store URL (e.g., via a link on a web page or via an e-mail message with the link included) OR you will need to turn on the Link-to-Single-Store-From-Mall option, which allows the store to work in single-store mode but provides the customary links to the store from within the uStores mall.

Note: For more about the Store-is-Viewable-In-Mall option, see "[The Store-Is-Viewable-in-Mall Option](#)" on page 191, and for more information about the Link-to-Single-Store-From-Mall option, see "[The Display-the-Store-In-This-Mode Option](#)" on page 191. For detailed information about store URLs, see "[Linking to a Store](#)" on page 241

The Left Navigation Menu

Stores in single-store mode do not have uStores mall's left navigation menu (unless the Store-Is-Viewable-In-Mall option has also been turned on). The left navigation menu disappears when single-store mode is turned on.

Here are examples of a store as it would look in the mall AND how the same store would look once single-store mode has been turned on:



This store is part of the uStores mall.



Single-Store mode has been turned on for this store (but no additional customizations have been made).

In the above examples, you should notice that the left navigation menu disappears for the store in single-store mode, which forces the remaining page elements to the left. In this case, the store manager may choose to make additional customizations to the store so that the entire horizontal width of the content area is used more effectively. These customizations might involve uploading a wider splash image or building new HTML content for the left side via the optional left navigation field.

Note: For more about building a new left navigation menu for a store in single-store mode, see ["The Header, Left Nav, and Footer Fields" on page 82.](#)

The Home Button

For stores in the uStores mall, the home button simply takes customers to the mall's home page. For stores in single-store mode, however, the home button works differently: it takes customers to the home page for the STORE.

By design, we have designed Marketplace's single-store mode so that stores can truly stand apart from the uStores mall. Therefore, for these stores, the home button no longer targets the mall home page, which would be inconsistent with the construction of independent stores.

In some instances, however, store managers may wish to reap the benefits of placement within the uStores mall while also maintaining a standalone store front. These store managers can use the Store-Is-Viewable-In-Mall option, as described in ["The Store-Is-Viewable-in-Mall Option" on page 191.](#)

Optional Page Elements

A store manager may decide that some page elements are irrelevant for a store in single-store mode. For example, a store manager might decide that the "Quantity" column on the shopping cart and checkout pages isn't appropriate for a store that takes alumni donations. Several page elements fall into this category and can be optionally displayed for stores in single-store mode.

Here is a sample page with optional page elements:



The red ellipses show the optional page elements.

Store managers can show/hide optional page elements by going to the Single Store Settings page of the Operation Center:

[merchant name] > Stores > [store name] > Store Settings > Single Store

Here is a list of the optional page elements for single-store mode:

- **Quantity Column**—In the shopping cart, as well as the checkout pages, a column for "Quantity" appears. This column indicates the quantity of each item that the customer is ordering. If this field is irrelevant for your store, you can remove this column.
- **Promotional Code Field**—(Not shown above) During the checkout process, a field for entering a promotional code appears. If this field is irrelevant for your store, you can remove the promotional code field.
- **Shipping Rates Link**—In the bottom navigation bar of Marketplace uStores, a link for "Shipping Rates" appears. If this link is irrelevant for your store, you can remove this link. When shoppers select the Shipping Rates links, a web page is displayed that shows the applicable shipping rates for the store that the shopper is viewing. The shipping rate page is generated automatically based on the configured shipping classes and shipping rates for the store.
- **Return Policy Link**—In the bottom navigation bar of Marketplace uStores, a link for "Return Policy" appears. If this link is irrelevant for your store, you can remove this link. When shoppers select the Return Policy link, a web page is displayed that provides information about the store's return policy. TouchNet strongly recommends that each store develop a return policy. For more information, see **"General Settings" on page 162**.
- **Register and Login Links**—In the top navigation bar of Marketplace uStores, 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 users). If these fields are irrelevant for your store, you can remove these fields.

And here are the optional page elements for single-store mode that can be customized with alternate text:

- **Privacy Policy Link**—When shoppers select the Privacy Policy link, a web page is displayed that provides information about the campus policy toward user privacy. TouchNet strongly recommends that you develop policies regarding the privacy of shoppers' data and the use of unsolicited bulk e-mail.
- **Help Link**—When shoppers select the Help link, a web page is displayed that provides help information about how to use the site.
- **Accessibility Link**—When shoppers select the Accessibility link, a web page is displayed that provides information about the campus policy toward user accessibility. TouchNet strongly recommends that you develop policies regarding user accessibility.

By turning on/off the display of these page elements for a store in single-store mode, the store manager can make the store better meet the expectations of its intended audience.

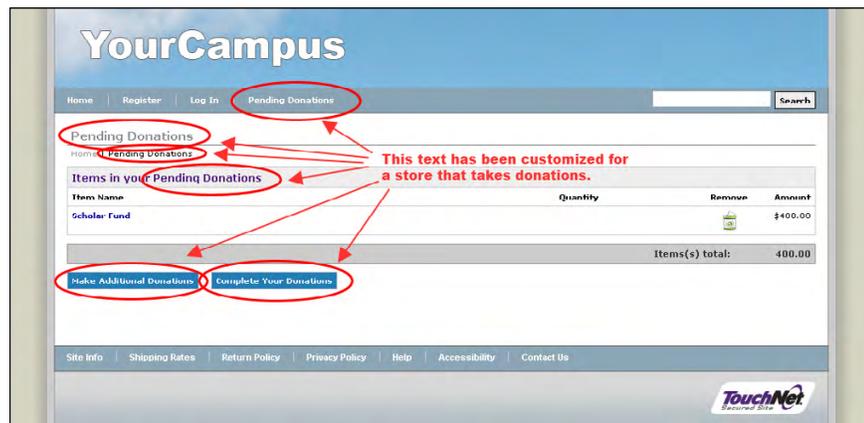
For information about turning on/off the optional page elements, see **"Single-Store Settings" on page 181**. For more information about using

alternative text with the Privacy Policy, Help, and Accessibility links, see ["Alternate Text Fields" on page 80](#).

Alternate Text Fields

Store managers may use single-store mode for making simple changes to button and link text. For example, a store manager might decide that language such as "Add to Cart" or "buyer" is not appropriate for a store that was created for accepting alumni donations. In this case, "Make a Gift" or "Donate Now" might be good alternatives to "Add to Cart," and the word "Donor" might be a good alternative for "Buyer."

Here is an example of shopping cart that has been customized with alternate text for a store that takes donations:



The red ellipses show the alternate text on this shopping cart page.

Store managers can edit the Alternate Text fields by going to the Single Store Settings page of the Operation Center:

[merchant name] > Stores > [store name] > Store Settings > Single Store

Here is a list of the alternate text fields that can be altered, along with examples of alternate text:

- **Alternate "Add to Cart" Text**—On product detail pages (as well as on product category pages that use the "detailed" layout), the words "Add to Cart" appear on buttons. A store manager setting up a store for taking conference registrations might choose to change this text to "Register Now," while the alternate text "Make a Donation" might be more appropriate for a store that takes alumni donations.
- **Alternate "Shopping Cart" Text**—At various places in the Marketplace shopping application, the words "shopping cart" appear. A store manager setting up a store for taking conference registrations might choose to change this text to "Pending Registrations," while the alternate text "Pending Gifts" might be more appropriate for a store that takes alumni donations. (Your entry in this field will also replace instances of "My Cart" in the top navigation bar.)
- **Alternate "Continue Shopping" Text**—As part of the Shopping Cart page, a "Continue Shopping" button appears that allows customers to

return to the store they were shopping in previously. A store manager setting up a store for taking conference registrations might choose to change this text to "Additional Registrations," while the alternate text "Make Another Donation" might be more appropriate for a store that takes alumni donations.

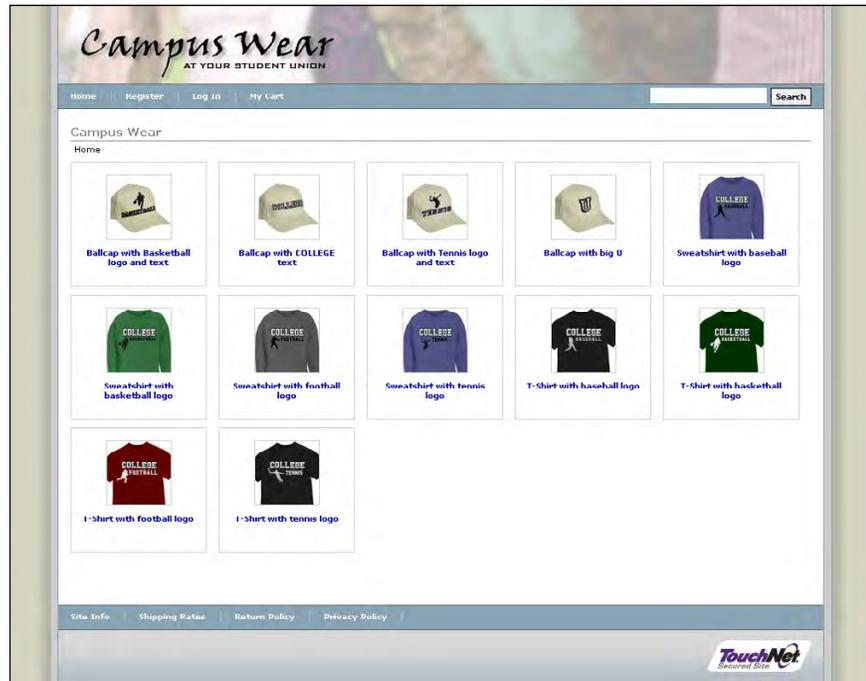
- **Alternate "Check Out" Text**—The Shopping Cart page includes a "Check Out" button that can be used to initiate the checkout process. A store manager setting up a store for taking conference registrations might choose to change this text to "Complete the Registration Process," while the alternate text "Complete Your Donation" might be more appropriate for a store that takes alumni donations.
- **Alternate "Order" Text**—At various places in the Marketplace shopping application, the word "order" appears. A store manager setting up a store for taking conference registrations might choose to change this text to "Reservation," while the alternate text "Donation" might be more appropriate for a store that takes alumni donations.
- **Alternate "Buyer" Text**—At various places in the Marketplace shopping application, the word "buyer" appears. A store manager setting up a store for taking conference registrations might choose to change this text to "Registrant," while the alternate text "Donor" might be more appropriate for a store that takes alumni donations.

By using single-store mode, the store manager can then make various customizations that help the store better meet the expectations of its intended audience.

Header Image

Stores in single-store mode have the option using their own header image in the header area of their web pages. While stores in the mall display the mall's header image in the header, stores in single-store mode can replace the mall header image with their own header image.

Here is an example of a store in single-store mode that has been customized with a header image:



A sample store with its own header image.

By using a header image, a store can give greater visibility to its store name and its branding.

Using a header image for a store in single-store mode is a two-step process, first the store manager must turn on the Show-Store-Header-Image option on the Single Store Settings page of the Operation Center:

[merchant name] > Stores > [store name] > Store Settings > Single Store

And then the store manager must upload a header image on the store's Image Settings page in the Operation Center:

[merchant name] > Stores > [store name] > Store Settings > Images

The use of a header image is typically an important part of developing the look and feel for a store in single-store mode.

The Header, Left Nav, and Footer Fields

Extra HTML can be added to stores in single-store mode. This HTML can be used for a wide range of purposes: for example, you can add additional text to store headers, you can add additional images, you can add navigation buttons, you can add informational tables, and you can add contact info to the footer. You can make these changes and many more edits. The limit is your own imagination.

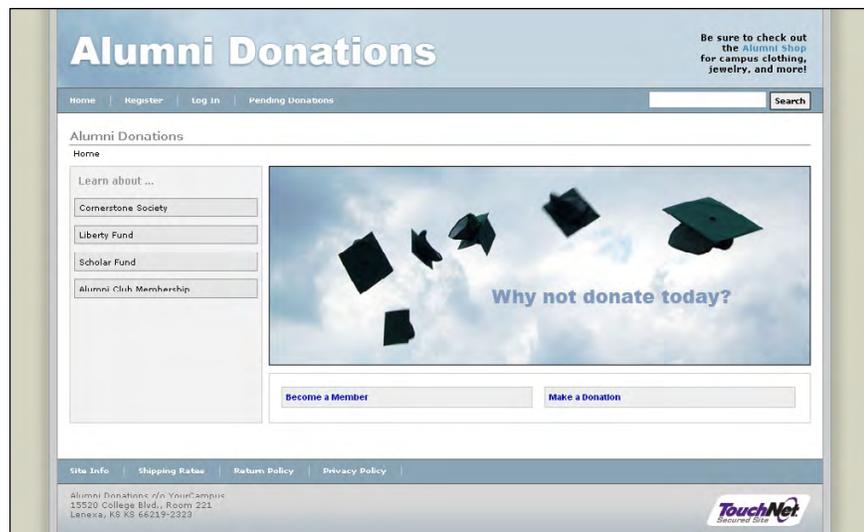
Important! The use of HTML in the header, left navigation and footer fields requires knowledge of CSS and HTML. We strongly recommend that only experienced web designers attempt to make these edits. Improperly formatted CSS or HTML may prevent customers from using stores. Please see the *Marketplace uStores Layout Guide* for more information about using the single-store mode's HTML fields.

The ability to add HTML to the header, left navigation, and footer fields provides store managers with a potentially powerful means of adding content to stores. It also provides web designers with the means of customizing the look and feel of stores so that store branding can be emphasized.

Store managers can add HTML to the header, left navigation, and footer fields by going to the Single Store Settings page of the Operation Center:

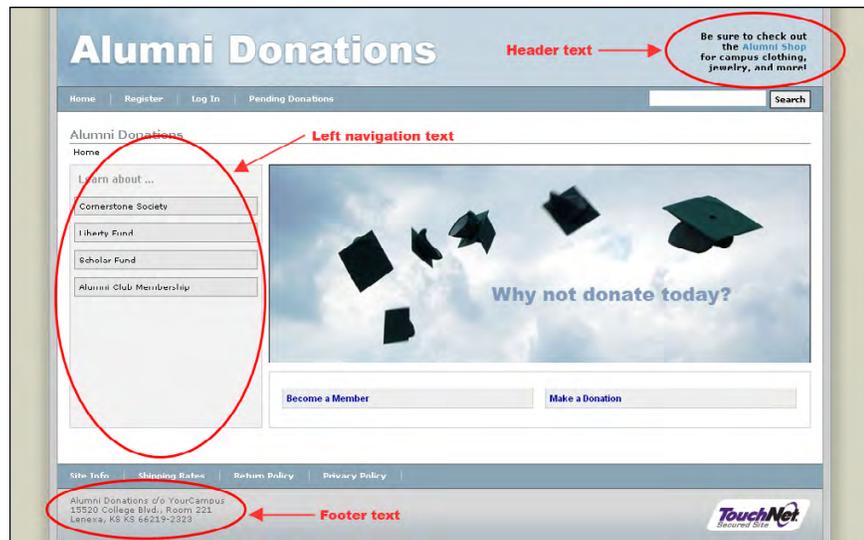
[merchant name] > Stores > [store name] > Store Settings > Single Store

Here is an example of a store in which extra HTML was added to the header, left navigation, and footer fields:



This store adds HTML to its pages via the header, left navigation, and footer fields.

And this example points out where the extra HTML is located in the previous example:



These callouts point out where HTML was added to this store page.

Note: In this example, extra HTML was used to add text and a link in the header. In the left navigation area, extra HTML and CSS modifications were used to build the new navigation menu. This menu contains direct links to the details pages for four products. In the footer, extra HTML was used to add the school address.

To order to use the header, left navigation, and footer fields for adding HTML, you will need to make CSS modifications.

For more information about single-store style sheets and CSS, see "[Single-Store Style Sheets](#)" on page 84.

Single-Store Style Sheets

The style sheets for stores in single-store mode can be downloaded and uploaded by store managers. Once a store manager has downloaded a store style sheet, the store manager can modify the style sheet and then upload and activate the style sheet for the store.

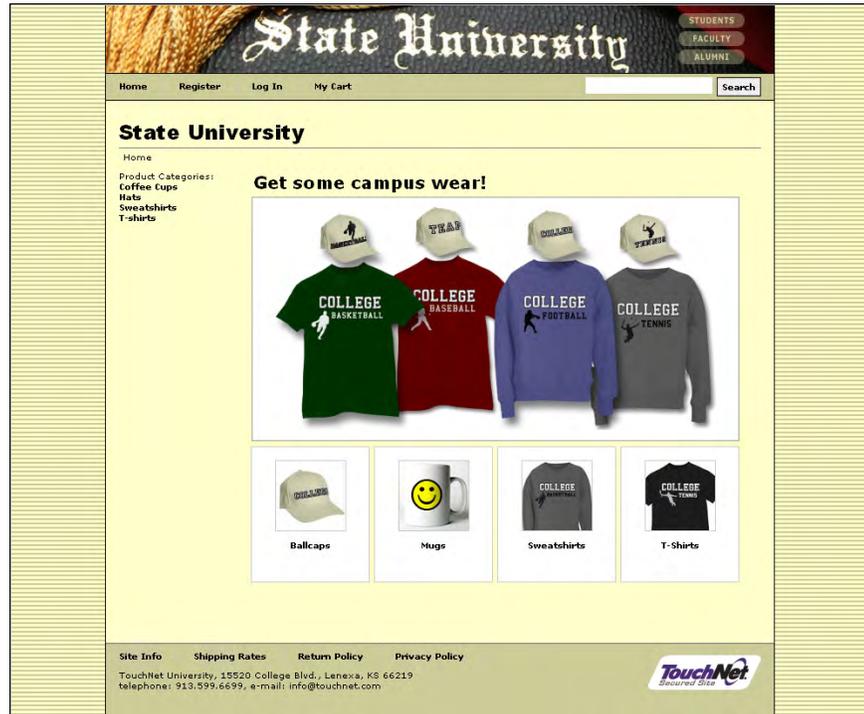
[merchant name] > Stores > [store name] > Store Settings > Single Store Style Sheets

Style sheet modifications can be used for a wide range of purposes. Some store managers may simply use style sheet edits to make simple changes to font families or font sizes, while other store managers may use style sheet edits to completely overhaul the look and feel of a store. The latter type of style sheet modification may involve using background colors and images that reflect the store branding. This type of change may be used to make a store look considerably different than the stores that use the mall look and feel.

For example, you can choose whether the site should be centered or left justified. You can choose whether the header and footer should span the entire browser window or be limited to a set pixel width. You can change background colors, font families, font sizes, link colors, and many other page elements.

Important! Any major changes to the style sheets should be performed by an experienced web designer. Faulty CSS code can cause stores to stop loading correctly in the web browsers of your customers.

Here is an example of a store in single-store mode that has been customized with style sheet changes.



The style sheets have been modified for this store.

The following list indicates the range of changes that can be made to the look and feel of stores through style sheet changes:

Modifying site layout

- Using a centered layout
- Using a left-justified layout
- Modifying the width of the content areas

Modifying background colors

- Modifying the header background color
- Modifying the footer background color
- Modifying the background color of the top navigation menu
- Modifying the background color of the left navigation buttons

- Modifying the background color of the bottom navigation menu
- Modifying the main content background color
- Modifying the margin colors
- Modifying the width and color of borders

Modifying link colors

- Modifying the link color used in the breadcrumbs
- Modifying the link color used in the top and bottom navigation menus
- Modifying the link color used in the main content area
- Modifying the link color used in the footer

This is a small sampling of the types of changes that can be accomplished by making style sheet changes. More advanced users with experience coding CSS can make more far-reaching changes to the store's look and feel, particularly when combining customized CSS with customized HTML (as is allowed with the header, left navigation, and footer fields, as well as the special announcement field).

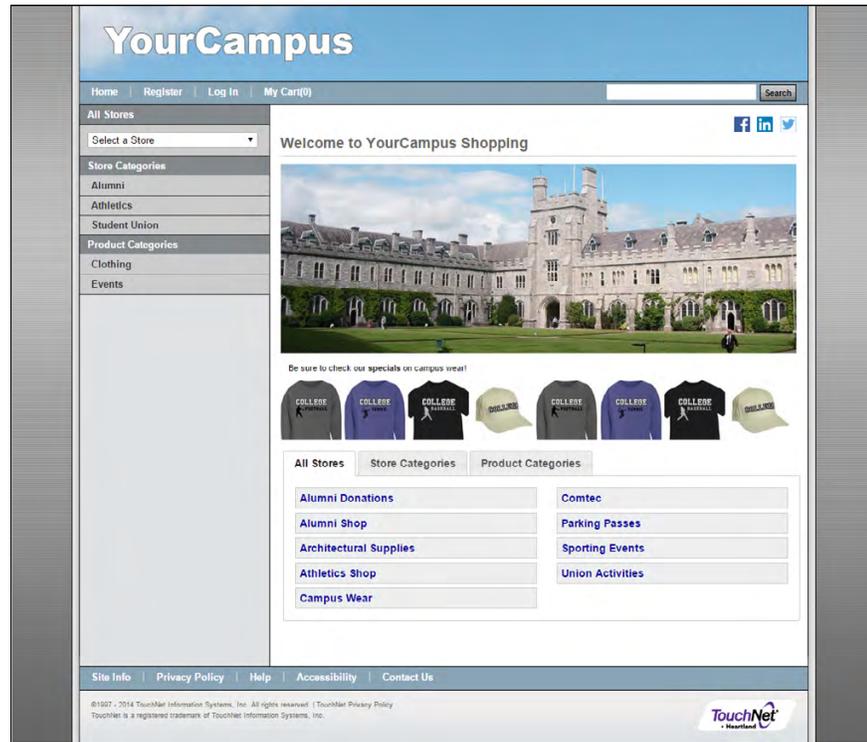
For more information about editing style sheets, see the *Marketplace uStores Layout Guide*.

2.8 What Shoppers See: Social Media

Social media integration is available for Marketplace uStores (as well as Mobile Marketplace). When this functionality is turned on and configured for display, customers will see links for social media functionality. The following social media types are available: Facebook, LinkedIn, and Twitter.

Mall Home Page

Here is an example of social media functionality appearing on a mall home page. If social media has been turned on at the System Administrative level and configured for display on mall pages, social media links will appear on the mall home page.

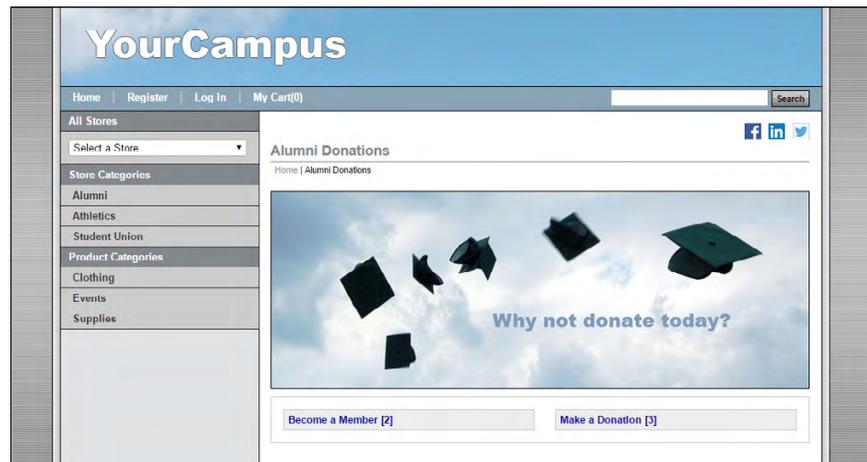


Social media functionality can be configured to appear on the mall home page.

For more information about social media configuration, see **"Social Media Settings" on page 126.**

Store Home Page

Here is an example of social media icons appearing on a store home page. If social media has been turned on at the System Administrative level and configured for display on mall pages, social media links will appear on store home pages.

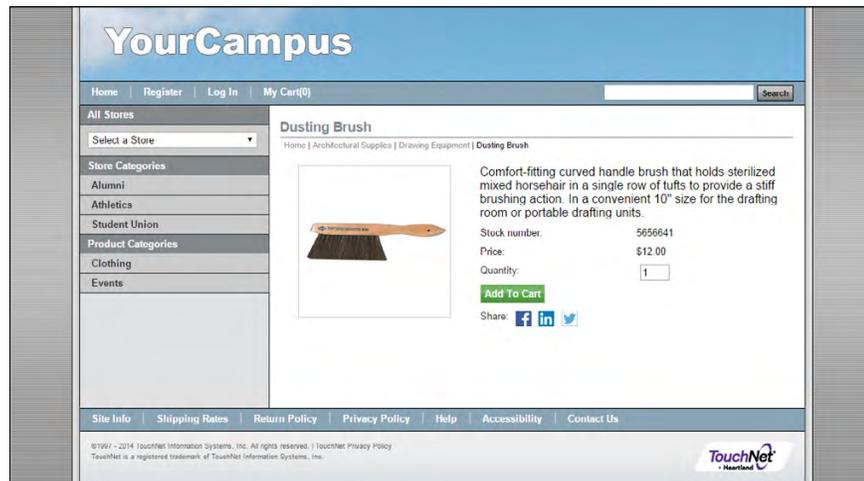


Social media icons appear on store home pages.

However, social media settings can be configured separately for stores in single-store mode. For more information about single-store mode configuration, see ["Single-Store Settings" on page 181](#).

Product Details Page

Here is an example of social media "share" links appearing on a Product Details page. To appear on the Product Details page, social media must be turned on in the Product Settings in the Marketplace Operations Center.



Social media icons can be configured to appear on the Product Details page.

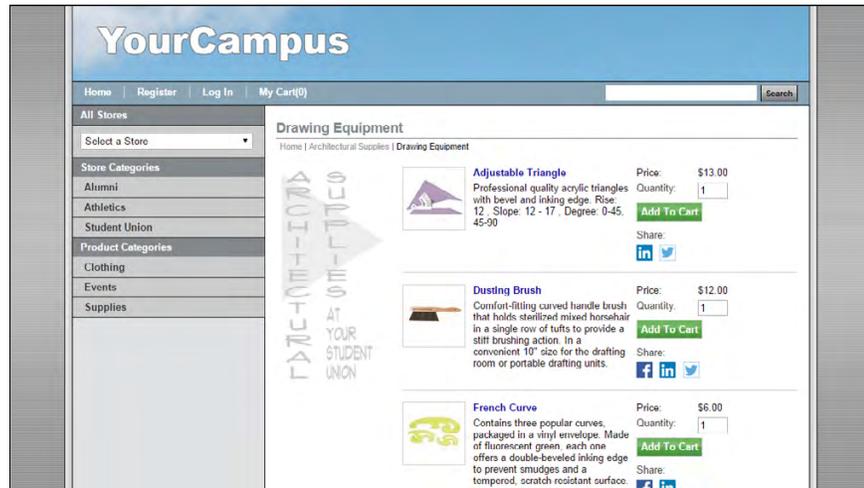
When a customer selects one of the social media "share" links, a pop-up window will appear for the selected social media type. The customer can enter information to be posted to their social media page or to be sent to specific e-mail addresses. This functionality varies depending on the selected social media type.

Note: If the customer is not currently logged into the selected social media type, they will be prompted to log in.

For more information about configuring product settings for social media, see ["Editing Products" on page 283](#).

Product Category Page (Detailed Layout)

Here is an example of social media "share" links appearing on a store-level product category page—detailed layout. To appear on the product category page (detailed layout), social media must be turned on in the Product Settings in the Marketplace Operations Center. Only products for which social media has been turned on will appear with social media "share" icons.



Social media links can be configured to appear when the detailed layout is used with the store-level Product Category page.

When a customer selects one of the social media "share" links, a pop-up window will appear for the selected social media type. The customer can enter information to be posted to the social media page or to be sent to specific e-mail addresses. This functionality varies depending on the selected social media type.

For more information about configuring product settings for social media, see **"Editing Products" on page 283**.

Part 3:
Administrative and
Merchant Setup

3.0 Administrative and Merchant Setup

TouchNet Marketplace gives you a vast and varied tool set for creating online stores and uPay payment pages. This setup begins with administrative settings and the creation of users and merchants.

The following table describes how uStores and uPay are affected by system administrative setup:

How is system administrative setup used by ...		
	uStores?	uPay?
Administrative settings	These settings determine how the uStores shopping mall will look and function. These settings involve the site name, images, style sheets, store categories, product categories, delivery methods, cache settings, tax account codes, accounting codes, special announcements, and much more.	These settings have no effect on uPay sites—except for Accounting Codes and the default state and country. Accounting codes established at the administrative level are available for uPay sites to use.
User settings	Various user types can be established, including chief administrators, administrators, merchant managers, and accountants. User groups and user authentication can be established.	Various user types can be established, including chief administrators, administrators, merchant managers, and accountants.
Merchants	Before you can create a Marketplace store or a uPay site, you must create a Marketplace merchant. Each merchant in Marketplace can have one or more stores and one or more uPay sites. Settings are associated with merchants that affect their stores and uPay sites.	

This section will help you move quickly through administrative setup. This setup must be completed by an administrator user.

You must complete the administrative settings before you bring any part of your Marketplace 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 507 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.

3.1 Planning Ahead

Administrators completing the global setup of Marketplace will 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 an administrator may need when beginning administrative setup.

Planning for Administrative Settings

Administrative settings are primarily about the global setup of uStores. (The only administrative settings that affect uPay are tax account codes and the default state and country.) Administrative settings determine how the uStores mall will function. These settings will also determine the look of the uStores mall and how users will shop there.

Important! Administrators must complete the setup of delivery methods before products can be added to stores.

The following planning summary discusses some of the main issues to be considered when planning for Marketplace.

Planning Summary for Administrative Settings

Shopping Site Basics	<ol style="list-style-type: none"> 1. What should the shopping site be named? 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	<ol style="list-style-type: none"> 6. What should we use as our home page splash graphic? 7. What URL will we link to from our mall header image, 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?
Look and Feel	<ol style="list-style-type: none"> 10. Should we customize the mall style sheet for campus colors, fonts, and other matters of look and feel? 11. Should we customize the checkout style sheet? 12. Do we need to make a standard set of supplementary style sheets available for all stores to use?
Categories	<ol style="list-style-type: none"> 13. Will we use category links on the shopping site's home page? 14. What product categories need to be created? 15. What store categories need to be created?

Delivery Methods	16. What major carriers and delivery services do we want stores to have the option of using for shipping? (Delivery methods MUST be set before products can be added to stores.)
Taxes	17. Are different levels of taxes charged on different types of products in our locale? 18. Should stores 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)	19. What general ledger codes should be used to track revenue? 20. What general ledger codes should be used for tracking revenue from taxes? 21. 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?

Planning for Administrative Users

There are four types of administrative users: chief administrators, administrators, accountants, and merchant managers. You will need to determine which user types you will need to create. In addition, you will need to consider whether any stores will need to limit customers to those in particular user groups (in which case private stores can be created in which users must be authenticated before they can shop at these stores).

Planning Summary for Administrative Users

Administrators	1. Who should be set up as the backup chief administrator? 2. Who else should be setup as an administrator?
Accountants	3. Does anyone ONLY need access to reports on total revenue by merchant?
Merchant Managers	4. Who needs to manage on-campus commerce for campus-affiliated groups (departments, organizations, etc.)?
User Groups	5. Do any user groups need to be established so that private stores can be created?

Merchants

Marketplace's use of merchants 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 or a uPay site, you must create a Marketplace merchant. Settings are associated with this merchant that affect its stores and uPay sites.

Planning Summary for Merchants

Merchant creation	1. What departments and campus organizations need to establish stores or uPay sites?
Merchant basics	2. Which Payment Gateway host system account will be used with each merchant? 3. What should the default return check fee be for ACH transactions? 4. How many days must a fulfiller wait before fulfilling ACH orders? 5. What should the ACH agreement say for uPay transactions? 6. Should credit cards be authorized at order time?
Accounting codes	7. Do accounting codes need to be created for use by all the merchants's stores and uPay sites?
Users	8. Who should be assigned to manage each merchant?
Tax account codes	9. Do merchant-level tax account codes need to be established?

3.2 System Administration Settings

Administrative settings are primarily about the global setup of uStores. (The only administrative settings that affect uPay are tax account codes.) Administrative settings determine how the uStores mall will function. These settings will also determine the look of the uStores mall and how users will shop there.

Important! Administrators must complete the setup of delivery methods before products can be added to stores.

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 Settings page, make the following selections in the left navigation menu:

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

Marketplace General Settings	
Marketplace global settings are configurable for stores and uPay sites.	
Print Page 	
General Settings	
Store Mall Name:	Marketplace 6.5
Store Special Announcement (5,000 chars max): (HTML Allowed)	
Administrative Settings	
Secure shopping pages (use https):	<input type="checkbox"/>
Secure checkout and user account pages (use https):	<input type="checkbox"/>
Show mall product categories:	<input checked="" type="checkbox"/>
Show total number of enabled products next to category links:	<input type="checkbox"/>
Require security code for credit cards for stores:	<input checked="" type="checkbox"/>
Require pin number for campus cards for stores:	<input type="checkbox"/>
Registered user can save payment methods:	<input checked="" type="checkbox"/>
Registered user can save shipping addresses:	<input checked="" type="checkbox"/>
Send \$1.00 credit card authorization upon recurring payment setup (temporarily encumbers credit card):	<input checked="" type="checkbox"/>
Default state/province:	Kansas
Default country:	United States
Default time zone:	Eastern Standard Time - US/Eastern (-5:00)
Host System configured in Payment Gateway:	Marketplace
Email Messages	
Default email address for Contact Us link in mall footer:	mall65default@touchnet.com
Thank You Statement (500 chars max):	
ACH Agreement	
ACH Agreement text for stores: (HTML Allowed)	Authorization Agreement for Electronic Payment (ACH DEBIT) 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 authorize the following debit transaction(s) to my account(s) based on the terms and
Return Policy Settings	
Text link for Return Policy in store footer and checkout:	Term and Conditions
Invoice Me	
Alternate name for Invoice Me payment method:	Invoice Me Later
Payment Gateway Defined Payment Method Id :	102

Complete the following fields:

General Settings

Store Mall Name

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

Store Special Announcement

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 5000 characters in this field. These characters may include HTML and/or CSS, which can be used to change the appearance of the special announcement.

HTML entered in this field must be properly formatted. It will undergo a validation process and any improperly formatted HTML will not be accepted. We recommend you become proficient in authoring HTML before you attempt to add HTML to this field.

Important! In order to ensure that Marketplace remains a secure environment for processing commerce transactions, fields that accept HTML in the Operation Center will not accept HTML comments, form tags, iframe tags, object tags, and some additional code—including JavaScript.

For more information about using HTML or CSS, please see the *Marketplace 6.5 uStores Layout Guide*.

Administrative Settings

"Secure shopping pages (use https)" and "Secure checkout and user account pages (use https)"

These checkboxes determine when shoppers switch to secure mode while shopping. You can check either or both boxes. TouchNet strongly recommends that you always use https security with the checkout and My Account pages.

If you check the "Secure checkout and user account pages" box, shoppers enter secure pages whenever they enter the checkout process or view their account information on the My Account pages.

If you check the "Secure shopping pages" box, shoppers enter secure pages as soon as they begin to browse in stores or categories. This provides https security on all uStores mall page.

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.

Show mall product categories

If you check this box, shoppers will see links in the left navigation menu for mall-level product categories. Shoppers will also see the Product Categories tab on the home page.

Show total number of enabled products next to category links

Select this box to show shoppers how many products are in a category (or in a subcategory). Showing the number of products in each category can help shoppers choose which categories to browse. The number will be used with both mall-level product categories and store-level product categories. The number will not appear in the left navigation menu. Nor will this number appear on the Product Category tab on the mall home page.

Require the security code for credit cards for stores

Use this checkbox to require uStores shoppers who are using a credit card to enter their credit card verification value during the checkout process. Depending on the credit card processor, a lower transaction rate may be available for these transactions.

Require pin number for campus cards for stores

Use this checkbox to require uStores shoppers who are using a campus card to enter their pin number during the checkout process.

"Registered user can save payment methods" and "Registered user can 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.

Send \$1.00 credit card authorization upon recurring payment setup (temporarily encumbers credit card)

If you check this box, Marketplace will send a \$1.00 credit card authorization when customers set up recurring payment schedules. This authorization temporarily encumbers the customer's credit card for \$1.00.

By sending this \$1.00 credit card authorization, you confirm that the credit card has a valid number and can be encumbered for at least \$1.00. After the credit card is authorized, Marketplace immediately reverses the \$1.00 encumbrment.

Default Cashier ID

For Banner by Ellucian customers, the Default Cashier ID field appears. For information about this field, see "[Default Cashier ID](#)" on page 513.

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.

Default time zone

The Default time zone field establishes the time zone that will be used for transactions, reports, and other Operations Center functionality.

Host system configured in Payment Gateway

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

Email Messages**Default email address for Contact Us link in mall footer**

A Contact Us link appears in the uStores bottom navigation bar. When customers click this link, their default e-mail software application will be launched and the e-mail address configured in this field will populate the TO field for the message. A similar field exists for each store (on the Store General Settings page). If this field has been configured for a store and the customer is on a store-specific page (such as the store home page, a store product page, or a store category page), the store contact e-mail address will be used for the "Contact Us" link; however, in this situation, the "Default contact email address for the site" will still be used for pages that are NOT store-specific, such as the mall home page, mall category pages, the shopping cart page, and the checkout pages.

If the default e-mail contact address has not been established, then the "Contact Us" link is not displayed.

The person whose address you list here might receive e-mail messages from shoppers about individual stores or products, as well as about the site itself. If you want all shopper e-mail messages to go to this address, ask your store

managers not to configure a store contact e-mail address for their stores. Be sure to keep this e-mail address current.

Thank You Statement

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.

ACH Agreement

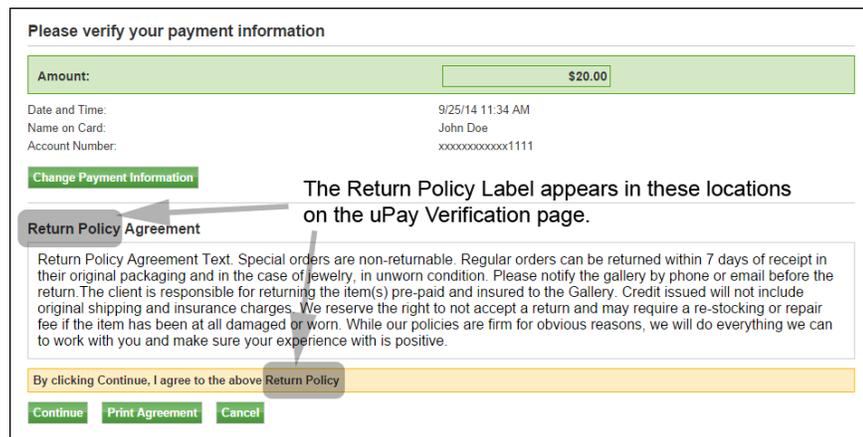
ACH Agreement text for stores

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.

Return Policy Settings

Text link For Return Policy in store footer and and checkout

The words "Return Policy" appear in the bottom navigation menu for stores, as well as during the checkout process. If this language does not fit the needs of your store, you can use the "Text for Return Policy" field to enter alternative text.



Please verify your payment information

Amount:

Date and Time: 9/25/14 11:34 AM
 Name on Card: John Doe
 Account Number: xxxxxxxxxxxx1111

[Change Payment Information](#)

[Return Policy Agreement](#)

The Return Policy Label appears in these locations on the uPay Verification page.

Return Policy Agreement Text. Special orders are non-returnable. Regular orders can be returned within 7 days of receipt in their original packaging and in the case of jewelry, in unworn condition. Please notify the gallery by phone or email before the return. The client is responsible for returning the item(s) pre-paid and insured to the Gallery. Credit issued will not include original shipping and insurance charges. We reserve the right to not accept a return and may require a re-stocking or repair fee if the item has been at all damaged or worn. While our policies are firm for obvious reasons, we will do everything we can to work with you and make sure your experience with is positive.

By clicking Continue, I agree to the above [Return Policy](#)

[Continue](#) [Print Agreement](#) [Cancel](#)

Here is an example of the Return Policy section that will appear to customers on the Review Order page of the uStores checkout process.

This field is NOT for the body text that appears for customers as the Return Policy Agreement (either on the Review Order page of the checkout process or on the Return Policy Agreement modal window). The body text for the Return Policy agreement is maintained on the General Settings page of stores, as described in "[General Settings](#)" on page 162.

Departmental Charge

For Banner by Ellucian customers, fields for Departmental Charge appear. For information about these fields, see ["Using Departmental Charges" on page 529](#).

Invoice Me**Alternate name for Invoice Me payment method**

You can modify how the name of the Invoice Me payment method is displayed to customers by entering text in this field.

Payment Gateway User Defined Payment Method ID

In order for "Invoice Me" 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.

Site Info Settings

Enable Site Info Link:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Text For Site Info Link:	<input type="text"/>
Site Info Link URL:	<input type="text"/>
- OR -	
Site Info Text (50,000 chars max): (HTML Allowed)	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>

Privacy Link Settings

Enable Privacy Link:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Text For Privacy Link:	<input type="text"/>
Privacy Link URL:	<input type="text"/>
- OR -	
Privacy Text (50,000 chars max): (HTML Allowed)	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>

Help Link Settings

Enable Help Link:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Text For Help Link:	<input type="text"/>
Help Link URL:	<input type="text"/>
- OR -	
Help Text (50,000 chars max): (HTML Allowed)	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>

Accessibility Link Settings

Enable Accessibility Link:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Text For Accessibility Link:	<input type="text"/>
Accessibility Link URL:	<input type="text"/>
- OR -	
Accessibility Text (50,000 chars max): (HTML Allowed)	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>

HTML can be used in the Privacy, Help, and Accessibility text fields.

Site Info, Privacy Link, Help, & Accessibility Settings

Enable [Site Info/Privacy/Help/Accessibility] Link

Separate sections for Site Info, Privacy, Help, and Accessibility allow you to manage these links and the informational pages that the links reference. By enabling each of these links, you determine if these links will be displayed in the bottom navigation menu. Stores in single-store mode can be configured with their own status for the Privacy, Help, and Accessibility links.

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 shoppers from the Privacy Policy link in uStores.

In addition, TouchNet strongly recommends that you develop policies regarding user accessibility. These policies should be available for shoppers from the Accessibility link in uStores.

Text for [Site Info/Privacy/Help/Accessibility] Link

The text for the Privacy, Help, and Accessibility links can be customized to meet the meetings of your installation of Marketplace. The alternate text that you enter in these fields will appear in the bottom navigation menu in uStores.

[Site Info/Privacy/Help/Accessibility] Link URL

An entry in the [Privacy/Help/Accessibility] URL field determines what happens when the shopper selects the corresponding link in the bottom navigation menu of uStores. If an entry is made in this field, a separate browser window will be used for loading the web page targeted by the URL. If no entry is made in this field, the entry in the [Privacy/Help/Accessibility] Text field will be displayed in a modal window.

Note: When you enter a URL, be sure to include "http://" at the beginning of the URL. For example, enter "http://www.statecollege.edu/policies/privacy.htm"; do NOT enter "www.statecollege.edu/policies/privacy.htm". If you do not include "http://" in the URL, the targeted web page will not load in the customer's browser.

[Site Info/Privacy/Help/Accessibility] Text

You can maintain the privacy policy page, the help page, and the accessibility page by using these fields.

You can enter up to 50,000 characters in each of these fields. These characters may include HTML.

HTML entered in this field must be properly formatted. It will undergo a validation process and any improperly formatted HTML will not be

accepted. We recommend you become proficient in authoring HTML before you attempt to add HTML to this field.

Important! In order to ensure that Marketplace remains a secure environment for processing commerce transactions, fields that accept HTML in the Operation Center will not accept HTML comments, form tags, iframe tags, object tags, and some additional code—including JavaScript.

For more information about using HTML or CSS, please see the *Marketplace 6.5 uStores Layout Guide*.

Images

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

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

The uStores Images page opens (shown below).

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

The uStores 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 Header Image section, click the "Upload Header Image" link. A pop-up Image Upload box opens.

Note: The header image will appear in the header 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 header image links" section, you can specify a URL for your header image and the alternate text that should appear when the shopper passes the cursor over the header image.

If you enter a URL here, your header image 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 header image 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.

Note: For an example of using a splash image and a header image, see ["What Shoppers See: The Mall" on page 32](#).

Image Specifications

- You can only use GIF, JPG, or PNG format images.
- Splash images are best displayed at a pixel size of 680 (width) x 250 (height).
- Header images are best displayed at a pixel size of 960 (width) x 100 (height).
- All images must have file sizes of 250K or less.

More About Header Images

With the default layout of uStores, the header area looks like this:



The mall header image appears in the header area.

The header area is 960 pixels wide. The mall header image appears flush left within the header area. If you have uploaded a header image that is less than 960 pixels wide by 100 pixels high (which is the recommended size),

you will see part of the background that has been applied to the header area. By default, the background color of the header area is white. This background color can be changed by editing the *marketplace.css* style sheet. For more about downloading and uploading style sheets, see "[Mall Style Sheets](#)" on page 132.

Here is an example of how the header will look if the mall header image is smaller than 960 pixels wide by 100 pixels wide.



In this example, the mall header image is much smaller than the header area.

In this situation, we recommend you take one of the following actions:

- Upload a new header image that is 960 pixels wide by 100 pixels high.
- Upload a new header image that uses a transparent background. This will allow the header's background to show through the transparent portion of the header image, which will make the header image blend into the header area.
- Edit the style sheet so that the header background color blends into the mall header image.

Important! Upon upgrade from Marketplace 5.x to Marketplace 6.x, the header size is increased from 800 pixels wide to 1024 pixels wide. We recommend that you view uStores in a browser soon after the upgrade and then take one of the actions described above so that the header image and header background work well together.

Store Categories

By using store categories, you build the left navigation menu. Customers can then use these categories to navigate to stores. Store categories provide a means for organizing stores into logical groups. This is especially important if your campus has a large number of stores.

Store categories are created by administrators. Administrators name and manage these categories. Store categories work well for grouping all the stores created by a campus department or organization. For example, an alumni group may have several stores, and this group may wish for their stores to be grouped into a store category named "Alumni."

Administrators do NOT place stores into store categories. It is up to store managers to choose whether to place their stores into store categories.

Note: For an example of store categories in the left navigation menu, see "[Left Navigation Menu](#)" on page 34.

To set up mall-level store categories, follow these steps.

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

Marketplace Store Categories

This page allows you to configure the mall level store categories. A category is shown if stores have been assigned. Categories assigned to stores can not be deleted.

[Add Store Category](#) [Store Category List](#)

Store Categories

Id	Name	Stores	Actions
1	Alumni	2	Edit
0	Athletics	2	Edit
3	English Department	0	Edit Delete
4	Music Department	1	Edit
2	Student Union	4	Edit

The Store Categories page

- Click the Add Store Category link. The Add Store Category page appears.

Add Store category

This page allows you to add a store category.

[Back To Store Categories](#)

Category Information

Category Name:

[Save](#)

The Add Store Category page.

- Enter a name for the store category.
- Click Save.

Note: After mall-level store categories have been created, it is the responsibility of store managers to place their stores into these categories, as described in "[General Settings](#)" on page 162.

Store Category Tips

- Check with store managers to hear what store categories would help them most. Also, tell store managers when new store categories are added or changed so they can make sure stores 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, and then remove unused categories later.
- Avoid giving a category the same name as a store or as a product category. If category names and store names are the same, navigation may be confusing for shoppers.

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

Managing Store Categories

You can edit a store category name by clicking the Edit link of the corresponding category. You can then edit the store name and upload a store category logo.

A store category thumbnail image can be uploaded with the Edit Store Category page.

Store category thumbnail images will appear on the Store Categories tab of the uStores mall home page. By default, store category thumbnail images are displayed on the mall home page in an area that is 48 pixels wide by 48 pixels high.

Note: You can upload images larger than the recommended size; however, only the upper left corner (48 pixels wide by 48 pixels high) of these images will be displayed.

Deleting a Store Category

On the Store Categories page, you can remove a store category by clicking the Delete button of the corresponding category. 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.

Mall Product Categories

uStores mall product 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 in product categories.

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

These categories are listed in the left navigation menu of the mall home page and in the tabbed section on the uStores mall home page. For examples of the product category pages, see "[Product Categories Layout](#)" on page 47.

Note: Only an administrator can set up uStores product categories.

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

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

Id	Name	Products	Actions
1	Clothing	21	Edit Add Sub-Level Category
30	Clothing - Ballcaps	2	Edit Add Sub-Level Category
35	Clothing - Sweatshirts	1	Edit Add Sub-Level Category
34	Clothing - T-Shirt	1	Edit Add Sub-Level Category
3	Events	15	Edit Add Sub-Level Category

The Marketplace Product Categories 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. For examples of the product category layout pages, see "[Product Categories Layout](#)" on page 47.

- **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 > Product Categories.
- 2 Click the Edit link for the category you want to set up. The Edit Product Category page opens.

Edit Product 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 Product Categories](#)

Parent Category:	Clothing
------------------	----------

Category Information

Name:	Ballo caps
-------	------------

[Rename](#)

Layout

Product Layout:	Detailed ▼ View layout samples
-----------------	---

[Update Layout](#)

Side Banner Image

Best results is using an image with the recommended size W x H: 150 x 300 pixels

No Images

[Upload Side Banner](#)

Thumbnail Image

Best results is using an image with the recommended W x H: 80 x 80 pixels

No Images

[Upload Thumbnail Image](#)

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 Side Banner to this category, click the Upload Side Banner button, browse to your image file, and then click the Upload Now button.

Note: The category side banner appears at the left side of the uStores category pages. For more about category logos, see "[Product Categories Layout](#)" on page 47.

- 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.

Important! It is your responsibility to ensure that you have all necessary rights for the images you upload. Images that you did not create (such as images on other web sites) are typically protected by copyright law and should not be uploaded for use in Marketplace unless you have received permission from the copyright holder.

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 the 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 > Product Categories, and click the Product Category List 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.

Marketplace Product Category List

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

Back To Product Categories

Category List

Top-Level Category Name	Sort Key
Clothing	<input style="width: 50px;" type="text"/>
Events	<input style="width: 50px;" type="text"/>

Save

Sub Category List

Clothing

Sub Category Name	Sort Key
Ballcaps	<input style="width: 50px;" type="text"/>
Sweatshirts	<input style="width: 50px;" type="text"/>
T-Shirt	<input style="width: 50px;" type="text"/>

Save

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 Product Category

To link directly to a specific site-level product 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.

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 left navigation menu, go to Marketplace Home > System Administration > Settings > Delivery Settings > Delivery Methods. The Marketplace Delivery Methods page appears.

Marketplace 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 "UPS Next Day Air", not "UPS" or "Next Day Air".

[Add Delivery Method](#)

Delivery Methods

Name	Actions
None	Edit Delete
Walk-In	Edit Delete
USPS First-Class Mail	Edit Delete
USPS Priority Mail	Edit Delete
USPS Express Mail	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.

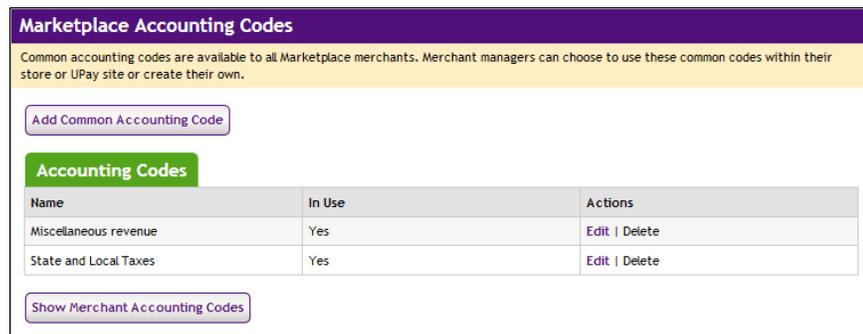
For instance, administrators can create accounting codes for each tax class. This will allow you to transfer tax revenue information to the general ledger system.

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.

Adding Accounting Codes as an Administrator

In the left navigation menu, go to Marketplace Home > System Administration > Settings > Accounting Codes. The Marketplace Accounting Codes screen opens.



Marketplace 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](#)

Accounting Codes

Name	In Use	Actions
Miscellaneous revenue	Yes	Edit Delete
State and Local Taxes	Yes	Edit Delete

[Show Merchant Accounting Codes](#)

- 1 Click the Add 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.

For Banner, Colleague, and PeopleSoft Customers

For more information about adding accounting codes, choose your general ledger system: [Banner](#), [Colleague](#), or [PeopleSoft](#).

Editing Accounting Codes as an Administrator

- 1 In the left navigation 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.

For Banner, Colleague, and PeopleSoft Customers

For more information about editing accounting codes, choose your general ledger system: [Banner](#), [Colleague](#), or [PeopleSoft](#).

Viewing Merchant Accounting Codes as an Administrator

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

The available accounting codes are set up in the Accounting Codes options. (See "[Accounting Codes](#)" on page 119.) For other details on accounting codes, see "[General Ledger Information](#)" on page 507.

To assign a tax account code:

- 1 In the left navigation menu, go to Marketplace Home > System Administration > Settings > Tax Account Codes. The Tax Account Codes screen opens.

Marketplace Tax Account Codes

Select an Accounting Code for each tax call to use with General Ledger integration.

Tax Account Codes

Tax Class Id	Tax Class Name	Accounting Code
0	no tax	<input type="text"/>
1	default tax rate	State and Local Taxes <input type="text"/>
2	higher tax rate	State and Local Taxes <input type="text"/>

- 2 For each tax class, select an accounting code from its dropdown list.
- 3 Click the Save button.

For Banner, Colleague, and PeopleSoft Customers

For more information about assigning accounting codes to tax classes, choose your general ledger system: [Banner](#), [Colleague](#), or [PeopleSoft](#).

About Tax Classes and Tax Rates

A tax class determines the tax rate charged for a purchased product or for 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.

Note: The higher tax rate is not available with the Marketplace tax service (introduced in Marketplace 6.5). For more about tax methods, see "**Tax Configuration**" on page 154.

Store managers or store clerks decide which tax class to charge for each product. They also decide which tax class to use for each delivery method.

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 left navigation 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 by Store Display Name. To change the store listing order, enter two-digit numbers (01, 02, 03, etc.) in the Sort Key field for each store.

Stores

Store Id	Store Display Name	Store Name	Sort Key
3	Alumni Donations	Alumni Donations	<input type="text"/>
2	Alumni Shop	Alumni Shop	<input type="text"/>
7	Architectural Supplies	Architectural Supplies	<input type="text"/>
5	Athletics Shop	Athletics Shop	<input type="text"/>
1	Campus Wear	Campus Wear	01
9	Parking Passes	Parking Passes	<input type="text"/>
8	Sporting Events	Sporting Events	<input type="text"/>
6	Union Activities	Union Activities	<input type="text"/>

- 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.

- Click the Save 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 Control Menu: Marketplace Home > System Administration > Settings > Digital Files. The Marketplace Digital File Settings page opens.

Marketplace Digital File Settings

These settings determine the maximum allowable size for digital files, as well as the total allocated server storage space for each store.

Mall Allocation Information

**** All sizes are in bytes. ****

Total Size Available for Digital Files:	10,485,760
Total Amount Used By All Stores:	5,593,388
Percent Allocated To Stores:	100
Maximum File Size:	<input type="text" value="10000001"/>

Merchant Allocation Information

Merchant	Store Name	% of Total File Allocation	Size Of Files	Total Allocated For Store Use
Student Union				
	Architectural Supplies	<input type="text" value="0"/>	0	0
	Campus Wear	<input type="text" value="0"/>	0	0
	Union Activities	<input type="text" value="0"/>	0	0
Alumni				
	Alumni Donations	<input type="text" value="100"/>	5,593,388	10,485,760
	Alumni Shop	<input type="text" value="0"/>	0	0
Athletics				
	Athletics Shop	<input type="text" value="0"/>	0	0
	Sporting Events	<input type="text" value="0"/>	0	0
Parking Passes				
	Parking Passes	<input type="text" value="0"/>	0	0
	Parking Passes Too	<input type="text" value="0"/>	0	0
Music Department				
	Concert Choir	<input type="text" value="0"/>	0	0

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

Field definitions:

Mall Allocation information

Total Size Available for Digital Files

The Total Size Available for Digital Files field 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 10,000,000 bytes (10 MB). If you would like to change this limit, you must

edit the *critical.prp* file. See the *Marketplace 6.5 Install Guide* for more information about editing the *critical.prp* file.

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

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.

Merchant Allocation Information

% of Total File Allocation

Percent of "Total Size Available for Digital Files" that is available to an individual store. The total of all percentages entered in this column for all merchants must add up to 100.

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.

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.

Text Messaging

The Text Messaging page can be used for configuring the URL for each text message carrier. Marketplace generates text messages with its e-mail message engine; therefore, carrier URLs must be configured. TouchNet

provides text message carrier configuration for many of the most frequently used carriers.

Your Marketplace administrator is responsible for maintaining the text message carrier configuration. New text message carriers can be added, while existing ones can be edited and deleted.

To view the Text Messaging page, go to Marketplace Home > System Administration > Settings > Communications. The Marketplace Communications page then opens.

Marketplace Communications

Add, edit, or delete text message carriers.

Print Page

Text Messaging

Enable Text Messaging: Yes No

[Save](#)

Add Message Carriers

Carrier Name		Carrier URL (do not add @)	Action
<input style="width: 90%;" type="text"/>	@	<input style="width: 90%;" type="text"/>	Add

Message Carriers

Carrier Name		Carrier URL	Action
Alltel	@	message.alltel.com	Change Delete
AT&T	@	att.net	Change Delete
AT&T	@	txt.att.net	Change Delete
Boost Mobile	@	myboostmobile.com	Change Delete
Nextel	@	messaging.nextel.com	Change Delete
Qwest Wireless	@	qwestmp.com	Change Delete
Sprint	@	messaging.sprintpcs.com	Change Delete
T-Mobile	@	tmomail.net	Change Delete
US Cellular	@	email.uscc.net	Change Delete
Verizon	@	vtext.com	Change Delete
Virgin Mobile USA	@	vmobl.com	Change Delete

The Text Messaging page is used to set up text messaging carriers.

In order for text messaging to be available to customers, an administrator must select Yes for "Enable text message alerts" and configure the carriers.

To Add a New Text Message Carrier

To add a new message carrier, you must enter a carrier name in the Carrier Name text box and a carrier URL in the Carrier URL box. Then select the Add New link.

For example to add Verizon Wireless for text messaging, you might enter **Verizon** in the Carrier Name text box (this name is displayed to customers when they select their text messaging carrier in their user profile) and **vtext.com** for the Carrier URL.

Adding text message carriers is just part of the setup process for text message carriers. The contents of text messages are maintained by each store. Store managers complete these setup steps, as described in "[Text Messaging](#)" on page 179.

To Edit an Existing Message Carrier

To edit an existing text message carrier, click the Change link for the corresponding carrier. Once you click this link, the Carrier Name and Carrier URL fields become editable. Enter your changes and then click the Save Changes link.

To Delete an Existing Text Message Carrier

To delete an existing text message carrier, simply click the Delete link for the corresponding carrier.

Social Media Settings

Marketplace allows you to configure social media integration for use by customers in uStores (and in Mobile Marketplace). Social media integration is available for Facebook LinkedIn, and Twitter.

A user with the administrator user role can use the Marketplace Social Media Settings page to turn on social media integration, to determine where social media links will appear, to select which social media to display, and to configure the URLs that will be used when a customer selects each social media link.

To view the Marketplace Social Media Settings page, go to Marketplace Home > System Administration > Settings > Social Media. The Marketplace Social Media Settings page then opens.

Marketplace Social Media Settings Print Page

This page allows you to indicate whether social media can be enabled for Marketplace.

Social Media General Settings

These global settings determine whether each social media type will be available for further consideration within the Marketplace Operation Center.

Facebook	<input checked="" type="radio"/> Yes <input type="radio"/> No
LinkedIn	<input checked="" type="radio"/> Yes <input type="radio"/> No
Twitter	<input checked="" type="radio"/> Yes <input type="radio"/> No

Social Media Mall Settings

These settings affect the display of social media on the mall home page and stores within the mall view (does not include stores that display in single-store mode).

Name	Display In Header?	Display In Footer?	URL (format: https://www.SocialMediaExample.com)	Sort Key
Twitter	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="text" value="https://www.twitter.com/Touchnet"/>	<input type="text" value="1"/>
Facebook	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="text" value="https://www.facebook.com/pages/Touchnet-Info"/>	<input type="text"/>
LinkedIn	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="text" value="https://www.linkedin.com/company/57321?trk=tyah&"/>	<input type="text"/>

The Marketplace Social Media Settings page allows you to turn on and configure integration for each social media type.

The Social Media General Settings

The settings in this section are global settings that determine whether each social media type will be available for further consideration within the Marketplace Operation Center. If you choose No for any of the social media types, configuration for that social media type will be grayed out in the Operations Center—and thus cannot be configured for use by uStores customers (and by Mobile Marketplace customers).

The Social Media Mall Settings

The settings in this section affect the display of social media on the mall home page and on store home pages. Stores in single-store mode have their own configuration settings, which are described in **"Single-Store Settings" on page 181**. Social media configuration for products is discussed in **"Editing Products" on page 283**.

You can designate whether social media links should appear at the top of the main content area (Display in the Header?) or the bottom (Display in the Footer?). Also, you can display social media links in both the header and footer.

If you select Yes for displaying a social media type in either the header or footer, you must enter a URL. This URL will be used when a customer clicks the social media icon. For example, each school typically has their own Facebook page, so you should determine the URL for your school's Facebook page and then enter this value in the URL field of the Social Media Mall Settings section. Likewise, if you select to display LinkedIn

and Twitter links, you must determine the URLs for your school's LinkedIn and Twitter sites.

In addition, you can use the Sort Key column to determine the display order for the social media icons.

Registered User Maintenance

In some situations, registered users for uStores may have saved payment methods to their profiles but then not used those payment methods for an extended period of time. Schools can determine how long unused payment profiles will be retained. Administrators can enter a date on the Registered User Maintenance page and all payment profiles that have not been used since that date will be deleted.

To view the Registered User Maintenance page, go to Marketplace Home > System Administration > Settings > Registered User Maintenance. The Registered User Maintenance page then appears.

You can delete payment profiles by using the Registered User Maintenance page.

To delete payment profiles, enter a date or use the calendar button to open the calendar widget and select a date.

Click the Get Number of Profiles That Will Be Deleted button to view a message that describes how many user-saved payment methods will be deleted.

Click the Delete User-Saved Payment Methods button to delete payment methods immediately.

Important! To help prevent the accidental deletion of all payment profiles, Marketplace requires that the date entered for deleting payment profiles be at least 90 days before the current date.

Cache Settings

Marketplace keeps information in memory about a number of products and "Items for Sale."

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

The product and "Items for Sale" cache sizes determine the number of products and "Items for Sale" for which Marketplace will store information in memory.

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

Products and "Items for Sales" that are frequently viewed by buyers are more likely to be available from 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, follow these steps:

- 1 In the left navigation 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 "Items for Sale" cache, then click the Update button.

Marketplace 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](#)

Store Product Cache

Store Location: <http://172.16.3.2:8080/ustores60/>

Maximum Cache Size	1000
# of Products in Cache	5
Total # of Requests	88
# of Cache Hits	82
# of Cache Misses	6
# of Cache Removals	0
Cache Hit Ratio	93.18%

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

New Maximum Product Cache Size:*

[Update Product Cache](#)

Store Items for Sale Cache

Store Location: <http://172.16.3.2:8080/ustores60/>

Maximum Cache Size	100
# of Item for Sale in Cache	4
Total # of Requests	206
# of Cache Hits	200
# of Cache Misses	6
# of Cache Removals	0
Cache Hit Ratio	97.09%

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

New Maximum Item for Sale Cache Size:*

[Update Item for Sale 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 "Items for Sale," 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 "Item for Sale" 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 "Items for Sale" 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.

Field definitions:

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.

of Products in Cache

The number of different products or "Items for Sale" that have been added to the cache as a result of buyers browsing to these products.

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 "Items for Sale").

of Cache Hits

The number of times the product or "Item for Sale" requested was found in the cache.

of Cache Misses

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

of Cache Removals

The number of times a product or "Item for Sale" in the cache has been removed from the cache. This occurs when the number of different products or "Items for Sale" 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.

The Marketplace Application Integration Map page (Marketplace Home > System Administration > Settings > System Integration Map) shows the URLs for the application servers and transaction manager values.

The Marketplace Connection Details page (Marketplace Home > System Administration > Settings > Site Connection Details) shows status information regarding the connection to uStores and uPay.

3.3 Mall Style Sheets

By editing the uStores style sheets, you can take greater control of how the uStores mall is displayed.

Important! Any major changes to the mall style sheets should be performed by an experienced web designer. Faulty CSS code can cause the mall to stop loading correctly in the web browsers of your customers.

System administrators can download and upload style sheets that determine the look-and-feel of the uStores mall by using the Mall Style Sheet Settings page in the System Administration section of the Operation Center:

System Administration > Settings > Style Sheets

The Marketplace Style Sheets page then appears.

Marketplace Style Sheets

To customize the layout of Stores, you can download and upload mall style sheets.

Main Style Sheet

Use this style sheet

The following style sheet controls how the mall and stores are displayed. You can download this style sheet. Your revised version of the style sheet can be uploaded. Once uploading a style sheet, you can choose which style sheet to use (the default version or the revised version) by selecting the corresponding radio button. (Filename: marketplace.css)

<input type="radio"/>	Default main style sheet	Download
<input checked="" type="radio"/>	Revised main style sheet	Download Upload

Cart Style Sheet

Use this style sheet

The following style sheet controls how the cart is displayed. You can download this style sheet. Your revised version of the style sheet can be uploaded. Once uploading a style sheet, you can choose which style sheet to use (the default version or the revised version) by selecting the corresponding radio button. (Filename: checkout_stylessheet.css)

<input checked="" type="radio"/>	Default cart style sheet	Download
<input type="radio"/>	Revised cart style sheet	Download Upload

Supplementary Style Sheets

Use this style sheet

You can upload supplementary Stores mall style sheets. By selecting the corresponding checkboxes, you tell Marketplace to use these style sheets. Multiple supplementary style sheets can be used at the same time. (Limit of 5)

<input checked="" type="checkbox"/>	tweaks.css	Download Upload Remove
Upload a supplementary style sheet:		Upload

[Save](#)

Administrators manage style sheets by using the Mall Style Sheet Settings page.

The following types of style sheets can be used with the uStores mall:

- **Main Style Sheet**—The main style sheet controls how the mall and stores are displayed. You can download this style sheet. Your revised version of the style sheet can be uploaded. After you have uploaded a revised style sheet, you can then activate the style sheet by choosing the radio button for the revised style sheet. You can also revert to the default main style sheet. (Required filename: *marketplace.css*.)
- **Cart Style Sheet**—The cart style sheet controls how the cart and checkout pages are displayed. You can download this style sheet. Your revised version of the style sheet can be uploaded. After you have uploaded a revised style sheet, you can then activate the style sheet by choosing the radio button for the revised style sheet. (Required filename: *checkout_stylessheet.css*.)
- **Supplementary Style Sheets**—The system administrator can also upload up to five supplementary style sheets as necessary. These style sheets for various purposes. They might be used to provide new styles for use with HTML added via the mall "special announcement" field or the product descriptions that appear on uStores product detail pages.

Avoid Replacing the Default Style Sheets

Marketplace includes functionality that allows you to upload revised style sheets. However, to help you minimize the amount of work that must be done each time a service pack is released, we suggest you avoid uploading replacements for the default style sheets. We suggest you instead upload "supplementary" style sheets that override property values specified in the default style sheets.

Here are the default style sheets that you should avoid replacing:

- uStores mall level – main style sheet (marketplace.css)
- uStores mall level – checkout style sheet (checkout_stylesheet.css)

If you avoid replacing the default style sheets, you will find that the fixes provided by style sheet modifications in service packs will typically take effect upon the installation of the service packs, and as a result, your default style sheets will stay up to date with the changes that we make to Marketplace.

Important! We strongly recommend that you avoid replacing the main style sheet (marketplace.css) and the checkout style sheet (checkout_stylesheet.css). If you instead use "supplementary" style sheets, your installation of Marketplace will use the style sheet fixes provided by service packs.

Modifying Style Sheets

Use the following steps for downloading, modifying, and uploading style sheets for uStores:

- 1 Click the Download button for the "Default" style sheet" that you would like to edit (or if you have already uploaded a style sheet, click the Download button for the "Revised" style sheet that you need to edit).

Your browser's save window will then appear.

- 2 Save the file.
- 3 Open the downloaded style sheet in the editor of your choice.
- 4 Edit the styles as necessary.

Your browser's save window will then appear.

Important! To ensure that Marketplace remains a secure environment for processing commerce transactions, some commonly used CSS code is not allowed in uploaded style sheets. For critical information about the validation process, see "[Validation of Style Sheets](#)" on page 136. And for a complete list of all allowed CSS, see the *Marketplace uStores Layout Guide*, which can be downloaded from the TouchNet Client Community.

- 5 Save the style sheet.
- 6 Use the following file names:

- The main style sheet must be named **marketplace.css**.
- The cart style sheet must be named **checkout_stylesheet.css**.

Note: The above file names must be used or Marketplace will not allow you to upload your revised style sheets.

- 7 Click the Upload button for the corresponding style sheet type.
The Marketplace CSS Upload window appears.
- 8 Click the Browse button and locate the style sheet that you modified.
- 9 Click the Upload Now button.

As part of the upload process, Marketplace validates the uploaded style sheet. Any CSS code that Marketplace considers to be invalid will not be accepted. A list of errors will be returned. You must fix these errors before Marketplace will accept your style sheet. We recommend you become proficient in authoring CSS before you attempt to upload style sheets.

Important! For critical information about the validation process, see ["Validation of Style Sheets" on page 136](#).

- 10 Select the corresponding "Revised" radio button in order to activate your modified style sheet.
- 11 Click the Save button.

Using Supplementary Style Sheets

As an alternative to modifying the main style sheet (or the cart style sheet), you can use the "Supplementary Style Sheets" feature to upload additional style sheets to be used by the uStores mall. Supplementary style sheets can be used to override the styles in the main style sheet.

When the uStores mall loads in the customer's browser, the main style sheet will load first and then the supplementary style sheets (thus overriding the mall style sheet).

Supplementary style sheets might come in handy if you want to separate uStores styles into multiple style sheets or if you want to introduce new styles to be used with configuration fields that allow you to add HTML to various uStores pages (such as the Announcement field, which can be used to add HTML to the mall home page, or the Product Description field, which can be used to add HTML to Product Detail pages).

You can upload up to five supplementary style sheets for use by your uStores mall. Use the checkboxes in the "Use this style sheet" column to select which supplementary style sheets should be active and then select the Save button.

Like the main style sheet, supplementary style sheets must pass a validation process before they can be uploaded. For more information about the validation process, see ["Validation of Style Sheets" on page 136](#).

Validation of Style Sheets

As part of the upload process, Marketplace validates the uploaded style sheet. Any CSS code that Marketplace considers to be invalid will not be accepted. A list of errors will be returned. You must fix these errors before Marketplace will accept your style sheet. We recommend you become proficient in authoring CSS before you attempt to upload style sheets.

In addition, to ensure that Marketplace remains a secure environment for processing commerce transactions, some commonly used CSS code is not allowed in uploaded style sheets.

This code includes (but is not limited to) the following:

- Position attributes with values of "absolute" or "relative"
- JavaScript
- Comments
- And any other code that TouchNet determines may potentially represent a security threat.

If any code in your style sheet does not pass the validation process, Marketplace will prompt you to edit the corresponding lines of your style sheet.

For more information about using Marketplace style sheets, including a list of all allowable CSS properties, please see the *Marketplace uStores Layout Guide*, which can be downloaded from the TouchNet Client Community.

Style Sheet Image Management

If a style sheet references any images, an administrator can upload these images by using the Style Sheet Image Management section of the Mall Style Sheet Settings page:

Marketplace Home > System Administration > Settings > Style Sheets

When this page appears, scroll down until the Style Sheet Image Management section is visible.

Style Sheet Image Management

To upload images in association with the mall and the style sheets listed above the context is as follows: ../style_images/mall/background_primary.gif

Context path:

Images

Image Name	Action
container-back.png	<input type="button" value="View"/> <input type="button" value="Remove"/>
content-back.png	<input type="button" value="View"/> <input type="button" value="Remove"/>
title.png	<input type="button" value="View"/> <input type="button" value="Remove"/>

Administrators manage images by using the Mall Style Sheet Settings page.

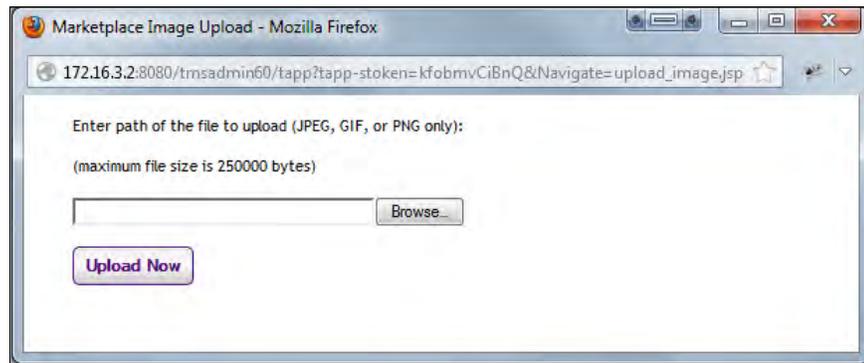
The top part of the Style Sheet Image Management section describes the context path for images. You will need to use this context path in order to reference the images that you upload.

The lower part of the Style Sheet Image Management section lists the images that have been uploaded. You can use the View button to open the Marketplace View Style Image window with the corresponding image displayed. You can use the Remove button to remove the reference to the image from the Marketplace database.

To upload an image, follow these instructions:

- 1 Select the Upload Image button.

The Marketplace Image Upload window then appears.



The Marketplace Image Upload window allows for a single image to be uploaded.

- 2 Select the Browse button.
- 3 Locate the image to be uploaded.
- 4 Select the Upload Now button.

The image name now appears in the Style Sheet Image Management section of the Mall Style Sheet Settings page. You can use the View button to the right of the image name to view this image.

Important! Be sure to make note of the context path described in the Style Sheet Image Management section. You must have this context path in order to reference an uploaded image from a style sheet.

Important! It is your responsibility to ensure that you have all necessary rights for the images you upload. Images that you did not create (such as images on other web sites) are typically protected by copyright law and should not be uploaded for use in Marketplace unless you have received permission from the copyright holder.

3.4 Administrative Users

Administrative users are responsible for the overall structure and settings used by uStores and uPay. These users are not responsible for creating stores or products or uPay sites, but they are responsible for setting up the environment that will be used by stores and uPay sites.

Important! We strongly suggest assigning more than one user the role of Chief Administrator so that if one Chief Administrator forgets their password another can still login. **Very important!**

The following descriptions summarize what each administrative user can do.

Administrative User Roles

User Role	What They Can Do
Chief administrator	<ul style="list-style-type: none"> • Manage administrative site settings • Upload header and splash page images • Create and maintain store categories • Create and maintain product categories • Name delivery methods • Create accounting codes and assign an accounting code for taxes • Modify the store listing order • Enable text message alerts • Configure the storage allocation for each store for digital products and specify the maximum file size • Delete unused payment methods saved by uStores registered users • Update store cache settings • Download, upload, and activate style sheets • Grant the chief administrator, administrator, accountant, and merchant manager roles to other users • Add uStores user groups • Manage uStores user authentication settings • Add new merchants • Review Marketplace financial reports <p>Note: 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.</p>
Administrator	<ul style="list-style-type: none"> • An administrator can do everything a chief administrator can, except add other chief administrators.
Accountant	<ul style="list-style-type: none"> • Review the Revenue by Merchant report. <p>Note: An accountant cannot make any changes to settings or assign user roles.</p>

User Role	What They Can Do
Merchant manager	<ul style="list-style-type: none"> • Manage general merchant settings • Grant the store manager and uPay site manager user roles to other users • Add stores and uPay sites for the assigned merchant • Edit general settings for stores created under the assigned merchant • Add accounting codes and assign the accounting code used for taxes • Review Marketplace financial reports

Adding Administrative Users

All users that have been added to U.Commerce are potential Marketplace users. If a user has not yet been added to U.Commerce, that user must be added to U.Commerce with U.Commerce's User Management application before that user can be configured with Marketplace roles.

Typically, not all U.Commerce users will have access to User Management in U.Commerce, so you may find the duty of creating a new U.Commerce user will need to be handed off to a User Management administrator.

Once a user has been added to U.Commerce, then an administrator can grant Marketplace roles to the user. For more information about granting Marketplace roles to users, see ["Editing Users" on page 140](#).

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

Editing Users

After U.Commerce users have been created, a Marketplace administrator can grant Marketplace roles to these users.

For information about how to edit store user roles, see ["Editing Store Users" on page 205](#), and for information about how to edit uPay site user roles, see ["Editing uPay Site User Roles" on page 493](#).

When you make changes to users, 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 Marketplace 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.

Chief administrators and administrators should follow these steps for editing users at the administrative level:

- 1 From the left navigation menu, navigate to Marketplace Home > System Administration > User Settings > Users. The "Marketplace Users by Role" page appears.
- 2 Look through the list of users for the one you would like to edit. If you do not see the user that you would like to edit, click the "View U.Commerce Users" button to see all U.Commerce users (even those who have not yet been granted Marketplace roles).
- 3 Click the Edit User link in the Action column of the user you would like to edit. The Edit User page appears.

On the Edit User page, the roles Chief Administrator, Administrator, and Accountant appear in the "Assigned Marketplace Roles" section. A checkbox for each merchant appears in the "Assigned as Merchant Manager" section.

Edit User

Add or remove user roles. The user will see changes at the next login.

Back To Marketplace Users
Back To All Marketplace Users

User Status

Status	Enabled
--------	---------

User Information

U.Commerce Username:	TNDV.gjohnson
First Name:	Gary
Last Name:	Johnson
U.Commerce Email:	gjohnson@touchnet.com
Email:	rstillwagon@touchnet.com

Save

Marketplace Roles

Assigned Marketplace Roles	Available Roles
Remove	Add
<input type="checkbox"/> Chief Administrator	- none -
<input type="checkbox"/> Administrator	
<input type="checkbox"/> Accountant	

Assigned as Merchant Manager	Available Merchants
Remove	Add
<input type="checkbox"/> Alumni	<input type="checkbox"/> English Department
<input type="checkbox"/> Athletics	<input type="checkbox"/> Music Department
<input type="checkbox"/> Student Union	<input type="checkbox"/> Parking Passes

Save

- 4 To add a role, click the checkbox for that role.

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

- 5 To remove a role, click the Remove checkbox for that role.
- 6 Click the Save button.

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 357](#).

For instructions on how 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 363](#).

3.5 Merchants

In Marketplace, the word "merchant" refers to a department or other campus entity (such as a campus organization) that needs to process payments.

Marketplace 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 stores or uPay sites can be created, a Marketplace administrator must create one or more merchants. When each store or uPay site is created, it is created as belonging to a merchant. Settings are associated with this merchant that affect its stores and uPay sites.

The merchant's settings include the wait period for ACH payments, the text for ACH agreements for uPay sites, return check fees, and more.



About Merchant Settings

Once an administrator creates a merchant, a new entry appears for the merchant in the left navigation menu. This entry contains all the links for maintaining the merchant settings. These settings are shared by all the stores and uPay sites that belong to this merchant.

While the initial merchant setup is accomplished at the administrative level, the subsequent maintenance of the merchant is performed on a new level—the merchant level. The administrator must name a merchant manager to be responsible for maintenance of the merchant settings.

In the sections to follow, we'll start with a discussion of how an administrator creates a merchant and then move to a discussion of how a merchant manager uses the merchant-level settings to maintain the merchant.

Adding Merchants

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 left navigation menu, navigate to Marketplace Home > System Administration > Merchants > Add New Merchant. The Add New Merchant page appears.

Add New Merchant

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

Merchant Information

Merchant Name:	<input type="text"/>
Payment Gateway Host System Account:	-- None -- <input type="button" value="v"/>

Credit Card Information

Credit Card is authorized at order time:	<input type="checkbox"/>
--	--------------------------

ACH Payment Settings

Default Return Check Fee: (ACH Fees are in USD \$)	<input type="text"/>
Wait period in days fulfiller must wait before fulfilling orders: (Also applies to Store and uPay refund requests)	<input type="text"/>
ACH Agreement Text For uPay Sites: (HTML Allowed)	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>

Merchant Manager User

To assign Merchant Manager to an existing Marketplace user, select user from Marketplace User.

Marketplace User:	<input type="button" value="v"/>
-------------------	----------------------------------

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.

- **Credit Card is authorized 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.

- **Default Return Check Fee**—This fee affects returned checks for ACH transactions.
- **Wait period in days fulfiller must wait before fulfilling orders**—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.
- **Marketplace User**—When you set up a merchant, you must choose a merchant manager. All existing U.Commerce users appear in the Marketplace User dropdown menu.

3 Click the Submit button.

Merchant Settings

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

- 1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Settings. The Merchant Settings page appears.

Alumni 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 Information

Merchant Id:	1
Merchant Name:	<input type="text" value="Alumni"/>
Payment Gateway Host System Account Name:	MP Host System
Payment Gateway Host System Account ID:	2

To update all TMS Merchants Host System Account Information, select Update Host System Account.

Update Host System Account

Credit Card Information

Authorize Credit Card at Order Time:	<input type="radio"/> Yes <input checked="" type="radio"/> No
--------------------------------------	---

ACH Payment Settings

ACH Fees are in USD (\$)

Default Return Check Fee:	<input type="text" value="3.00"/>
Wait period in days fulfiller must wait before fulfilling orders: (Also applies to Store and uPay refund requests)	<input type="text" value="3"/>

ACH Agreement Text For uPay Sites: (HTML Allowed)	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.
--	---

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.
- **Authorize Credit Card at Order Time**—Use this option in order to encumber the customer's credit card at the time an order is submitted (during the uStores checkout process). By using this option, you determine if 1) the credit card information is valid and 2) sufficient funds are available. In addition, if auto authorization 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.
- **Default Return Check Fee**—This fee affects returned checks for ACH transactions.
- **Wait period in days fulfiller must wait before fulfilling orders**—This wait period affects both purchases in uStores sites and refund requests in uPay sites. Enter the number of days to wait before fulfilling a uStores order paid for using the ACH payment method (or before a uPay transaction can be refunded). 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.
- **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.

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. However, you can update Marketplace with the current payment information for the Host System Account—as stored in Payment Gateway—by clicking the Update Host System Account button on the Merchant Settings page. For more information, see "[Updating the Host System Account](#)" on page 146.

Updating the Host System Account

In addition to the standard merchant settings, the payment information for linked payment methods for the Host System Account can be updated with the Merchant Settings page (navigate to Marketplace Home > [merchant] > Settings). Look for the Merchant Information section at the top of the page.

If changes have been made to payment information for linked payment methods in Payment Gateway for the Host System Account being used by the merchant, you will need to update Marketplace to use this new

payment information. Any merchant manager can update the payment information by selecting the Update Host System Account button.

When this button is selected, the Host System Account payment information for ALL Marketplace merchants is updated.

Important! If the Host System Account payment information has changed in Payment Gateway, you must update Marketplace to use this updated information or payments may fail.

Deleting a Merchant

A merchant manager can delete a merchant by following these steps.

- 1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Settings. The Merchant Settings page 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 left navigation menu has also been removed.

Note: A merchant can only be deleted if no orders have been placed with the merchant's stores AND no payments have been taken with the merchant's uPay sites.

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.

Merchant 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.

Adding Accounting Codes as a Merchant manager

- 1 In the left navigation menu, go to Marketplace Home > [Merchant Name] > Accounting Codes. The Merchant Accounting Codes screen opens.

Alumni 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.

Available Common Accounting Codes

Miscellaneous revenue
State and Local Taxes

[Add >>](#)

[Add Accounting Code](#)

Enabled Common Accounting Codes

Name	In Use	Actions
None currently enabled.		

Current Accounting Codes

Name	In Use	Actions
Parking Permit Fee	Yes	Edit Delete

- 2 The accounting codes listed in the Available Common Accounting Codes box were created by a Marketplace administrator. To make a common code available for use by the merchant and its stores, select the accounting code name and click the Add button.
- 3 To add a new code, click the Add New Accounting Code button. 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.

Add A New Accounting Code

[Back To Alumni Accounting Codes](#)

Accounting Code:

New Accounting Code Name:

[Add](#)

Current Accounting Code Names In Use

Accounting code names must be unique, case-insensitive. Listed below are existing names.

Parking Permit Fee

- 4 In the Account Code field, enter the accounting 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.

For Banner, Colleague, and PeopleSoft Customers

For more information about adding accounting codes, choose your general ledger system: [Banner](#), [Colleague](#), or [PeopleSoft](#).

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 left navigation 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.

- 3 Update the Account Code or the Account Code Name fields as needed.
- 4 Click the Save button.

For Banner, Colleague, and PeopleSoft Customers

For more information about editing accounting codes, choose your general ledger system: [Banner](#), [Colleague](#), or [PeopleSoft](#).

Merchant Tax Account Codes

Marketplace administrators can set up tax account codes; however, merchant managers can override the administrative tax account accounts by setting up merchant level tax account codes.

You will first need to set up the general ledger accounting codes that can be used by the merchant, as described in "[Merchant Accounting Codes](#)" on [page 147](#). Once these accounting codes are established you can then assign these accounting codes to tax classes.

To assign a tax account code, follow these steps:

- 1 In the left navigation menu, go to Marketplace Home > [merchant] > Tax Account Codes. The Merchant Tax Account Codes page opens.

Alumni Tax Account Codes

You can override the Mail settings for all Stores in this Merchant by selecting an accounting code for each tax class.

Tax Account Codes	
Tax Class Name	Accounting Code
no tax	<input type="text"/>
default tax rate	<input type="text"/>
higher tax rate	<input type="text"/>

- For each tax class, select an accounting code from the Accounting Code dropdown list.
- Click the Save button.

For Banner, Colleague, and PeopleSoft Customers

For more information about assigning accounting codes to tax classes, choose your general ledger system: [Banner](#), [Colleague](#), or [PeopleSoft](#).

Adding Managers

All users that have been added to U.Commerce are potential Marketplace users. If a user has not yet been added to U.Commerce, that user must be added to U.Commerce with U.Commerce's User Management application before that user can be configured with Marketplace roles.

Typically, not all U.Commerce users will have access to User Management in U.Commerce, so you may find the duty of creating a new U.Commerce user will need to be handed off to a User Management administrator.

Merchant managers can assign the merchant manager role, the store manager role, or the uPay site manager role by following these steps:

Note: Only a merchant manager can add a store manager or a u Pay site manager.

- From the left navigation menu, navigate to Marketplace Home > [merchant] > Users. The "Merchant Users by Role" page appears. This page will show users who have already been granted the merchant manager role (or the store manager role or the uPay site manager role).

Alumni 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.

[View All Marketplace Users](#)

Merchant Managers

Show 25 entries Search:

Full Name	U.Commerce Username	Action	Action
Ash, Melissa		Enabled (Disable)	Edit User
Gaynor, Brett		Enabled (Disable)	Edit User
Johnson, Gary	TNDV.gjohnson	Enabled	Edit User
Johnson, Gary	tndv.gjohnson	Enabled (Disable)	Edit User
Johnson, Gary		Enabled (Disable)	Edit User
Snyder, Scot		Enabled (Disable)	Edit User

Showing 1 to 6 of 6 entries First Previous 1 Next Last

Store Managers

Full Name	U.Commerce Username	Action	Action
Alumni Donations			
Johnson, Gary	TNDV.gjohnson	Enabled	Edit User
Johnson, Gary	tndv.gjohnson	Enabled (Disable)	Edit User
Ash, Melissa		Enabled (Disable)	Edit User

- 2 Click the "View U.Commerce Users" button to see all U.Commerce users (even those who have not yet been granted Marketplace roles).
- 3 Click the Edit User link in the Action column of the user you would like to edit. The Edit User page appears.

On the Edit User page, look for the "Assigned as Merchant Manager" section and the name of the merchant for which you would like to name a merchant manager.

Edit User

Add or remove user roles. The user will see changes at the next login.

Back To Marketplace Users
Back To All Marketplace Users

User Status

Status	Enabled
--------	---------

User Information

U.Commerce Username:	TNDV.gjohnson
First Name:	Gary
Last Name:	Johnson
U.Commerce Email:	gjohnson@touchnet.com
Email:	rstillwagon@touchnet.com

Save

Marketplace Roles

Assigned Marketplace Roles	Available Roles
Remove	Add
<input type="checkbox"/> Chief Administrator	- none -
<input type="checkbox"/> Administrator	
<input type="checkbox"/> Accountant	
Assigned as Merchant Manager	Available Merchants
Remove	Add
<input type="checkbox"/> Alumni	<input type="checkbox"/> English Department
<input type="checkbox"/> Athletics	<input type="checkbox"/> Music Department
<input type="checkbox"/> Student Union	<input type="checkbox"/> Parking Passes

Save

- 4 Select the checkbox for the merchant.

Note: Only chief administrators and administrators can grant the merchant manager role.

- 5 Click the Save button.
- 6 Notify the user that you have given them a new Marketplace role.

Editing Managers

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

Note: Only merchant managers can edit store managers and uPay site managers.

- 1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Users. The Marketplace Merchant User Settings page 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
-----------	----------	--------

- Click the Edit User link to the right of the person for which you want to edit roles. The following page appears:

Edit User [gjohnson]

Add or remove user privileges for stores or uPay sites. The user will see changed options at the next login.

[Back To Merchant Users by Role](#)

Currently Store Manager Of	Stores Available To Manage
Remove	Add
<input type="checkbox"/> Campus Books	- none -
<input type="checkbox"/> Campus Events	
<input type="checkbox"/> Campus Wear	
Currently uPay Site Manager Of	uPay Sites Available To Manage
Remove	Add
- none -	- none -

[Save](#)

The Currently Store Manager Of column displays a list of the stores that the user is currently assigned to manage for this merchant. Additional store that can be assigned to this user are displayed in the Store Available To Manage column.

The Currently uPay Site Manager Of column displays a list of the uPay sites that the user is currently assigned to manage for this merchant. Additional uPay sites that can be assigned to this user are displayed in the uPay Sites Available To Manage column.

- 3 To assign a store or uPay site to the user, select the Add checkbox for that store or uPay site. To un-assign a store or uPay site from the user, click the Remove check box for that store or uPay site.
- 4 Click the Save Changes button.

3.6 Tax Configuration

Marketplace offers two methods for computing taxes. Store managers have the ability to choose which tax option best meets the needs of their store. Administrators need to understand the tax options because a Marketplace administrator is responsible for configuring tax rates. The following table describes the two tax methods and the pros and cons of these methods.

Tax Method	Pros	Cons
<p><i>Campus-maintained Tax Rates:</i> The campus maintains the files that specify the tax rates. (This is the only tax method available in Marketplace 6.0 and earlier.)</p>	<ul style="list-style-type: none"> • The campus can take control as necessary over the applicable tax rates (for example, for a one-day zero-tax holiday). • Allows for three tax rates: No tax, default tax, and higher tax. 	<ul style="list-style-type: none"> • A Marketplace administrator is responsible for maintaining tax rates for all cities, counties, and states where tax will be charged. • Tax rates can be applied at city, county, and state level, but not at the ZIP code level.

Tax Method	Pros	Cons
<p><i>Marketplace Tax Service:</i> Marketplace utilizes a tax service that maintains the tax rate files. (This tax method is new in Marketplace 6.5.)</p>	<ul style="list-style-type: none"> • The tax service maintains the tax rates for all USA states and territories. • Tax rates are updated monthly. • Tax rates are applied at a ZIP+4 level, thus providing greater accuracy. 	<ul style="list-style-type: none"> • Only two tax rates are available: No tax and default tax (i.e., a higher tax rate is not available).

Important! By default, stores use the campus-maintained tax method (in which the campus is responsible for managing the tax rate files). Therefore it is important that the Marketplace administrator configure the campus-maintained tax rate files—or otherwise communicate with all store managers the importance of selecting the Marketplace tax service. If the administrator has not configured the tax rate files and a store manager has not selected the Marketplace tax service, then no tax will be withheld for that store.

The following instructions only apply for campus-maintained tax rates. For the Marketplace tax service, the tax rate files cannot be edited.

The location of the tax rate files

The tax rate files used by the campus-maintained tax rate method reside on the server where the Marketplace database components were installed. (In contrast, the Marketplace Tax Service files reside on the TouchNet DataCenter servers and are not part of the Marketplace installation.)

For on-campus installations of Marketplace, a Marketplace administrator must contact the IT group that is responsible for the installation of Marketplace and request these two files:

- *city_county.dat*
- *taxrates.dat*.

These files can be found in this folder:

touchnet\marketplace\sys\stmstax\data

For TouchNet DataCenter installations of Marketplace, a Marketplace administrator must contact TouchNet Customer Care and request the tax files.

Important! If your installation of Marketplace is in the TouchNet DataCenter, you must contact TouchNet Customer Care to request the *taxrates.dat* file and the *city_county.dat* file.

Editing the city_county.dat file

The *city_county.dat* file simply associates each city with its county in every state where you will charge tax. 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.

The *city_county.dat* file contains a list of all cities in your state, identified by county.

- 1 Use a text editor to open the *city_county.dat* file.
- 2 In the file, list all cities in your state, identified by county. Follow this format:

```
|STATE|City|County
```

The state should be entered using its two-character postal abbreviation. The three parts of the entry must each be separated by a vertical pipe character.

- 3 Save and close the file.

Example

This example shows the first three entries in the *city_county.dat* file for the state of New York.

```
|NY|Abbott|Cattaraugus  
|NY|Abell Corners|Madison  
|NY|Academy|Albany
```

Editing the taxrates.dat file

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.

Important! You should ensure the *taxrates.dat* file contains tax rates for the default delivery locations used by every store configured in Marketplace.

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
```

Part 4:
Building and
Managing Stores

4.0 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.

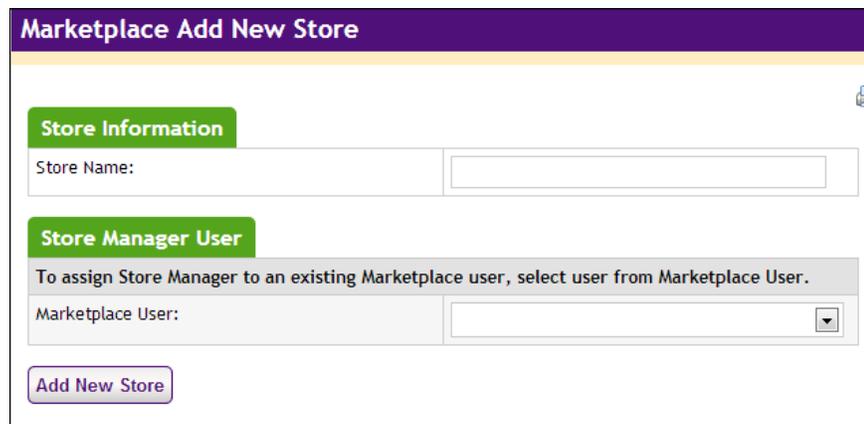
4.1 Adding a New Store

Stores are set up by merchant managers. Before setting up a new store, the merchant manager needs to have considered how the store will be configured. Here are some of the main questions to consider:

- What name should be used for the store?
- Who will be the store manager?
- What should the store's return policy say?
- What should the store's order e-mail messages say?
- Will the store use general ledger reporting? And if so, what accounting codes should be used? Should new accounting codes be created?

To add a new store, a merchant manager should follow these steps:

- 1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > Add New Store. The Marketplace Add New Store page appears.



The screenshot shows the 'Marketplace Add New Store' form. It has a purple header with the title 'Marketplace Add New Store'. Below the header, there are two main sections. The first section is titled 'Store Information' and contains a text input field for 'Store Name:'. The second section is titled 'Store Manager User' and contains a dropdown menu for 'Marketplace User:' with a downward arrow. Below these sections is a purple button labeled 'Add New Store'.

- 2 Enter the store name. This name will be displayed in the Operations Center and in reports. The store manager can change the name later if necessary.
- 3 To assign a store manager, select a U.Commerce user from the Marketplace User dropdown list. (All U.Commerce users are available in this list.)

- 4 Click the Add New Store button. The store is created and the General Settings page appears.

For more information about store general settings, see "[General Settings](#)" on page 98.

4.2 Store Settings

Each store's general settings can be changed easily whenever necessary by the merchant manager or store manager. Unlike changes to mall features, changes to store settings don't affect other stores or the design of the mall'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 Classes](#)" on page 212. Without at least one shipment class, products cannot be added to the store.

General Settings

The process of configuring a store begins when a merchant manager creates a new store. After a store is created, the merchant manager can turn over the configuration of the store to a store manager.

To view the Store General Settings page, make the following selections in the left navigation menu:

Navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > General.

The Store General Settings page then appears.

Alumni Donations General Settings

Settings on this page change your store display and global options that will apply to products.

Print Page

General Settings

Store Id :	3
Store Name:	<input type="text" value="Alumni Donations"/>
Store Display Name:	<input type="text" value="Alumni Donations"/>
Store Contact Email Address:	<input type="text" value="joed@touchnet.com"/>
Store status:	Enabled Manage Status
Store Home Page Layout:	Splash (Top Level Categories and Splash Image) ▼
Applies only to this store and products Management Status	
Time Zone:	Central Standard Time - America/Chicago (-6:00) ▼

Special Announcement

Special Announcement for Stores: (5,000 chars max)
 (HTML Allowed)

Email Messages

Email Thank You Statement: (500 chars max)	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>
Email Order Announcement: (5,000 chars max)	Thank you for your donation!
Email Fulfillment Announcement: (5,000 chars max)	Thank you for your donation!
Email Cancel Order Announcement: (5,000 chars max)	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>
Email Refund Order Announcement: (5,000 chars max)	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>

Complete the following fields:

General Settings

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 241](#).

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.

Store Contact Email Address

A Contact Us link appears in the uStores bottom navigation bar. When customers click this link and they are on a store-specific page (such as the store home page, a store product page, or a store category page), the store contact e-mail address will be used for the "Contact Us" link. If the customer is on a page that is NOT store-specific (such as the mall home page, mall category pages, the shopping cart page, and the checkout pages), then the "Default store contact email address" configured at the administrative level will be used instead.

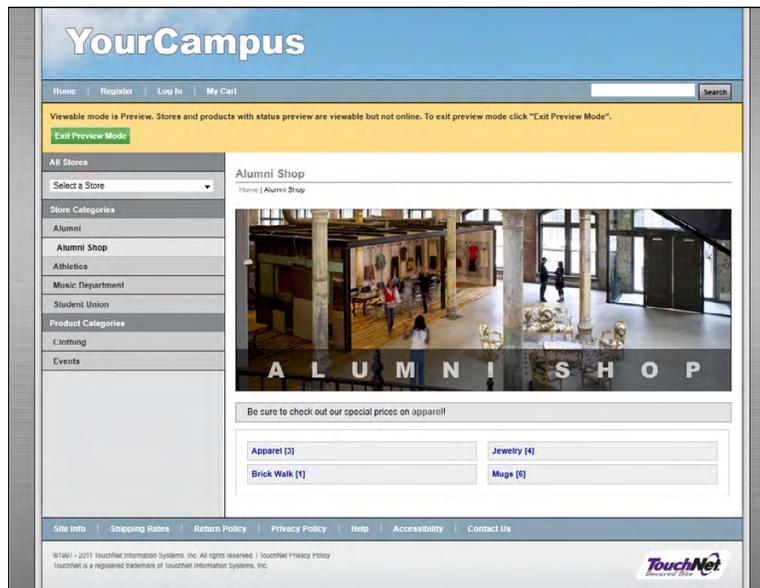
If the store contact e-mail address has not been established, then the administrative level e-mail address will be used. If neither contact e-mail address has been configured, the "Contact Us" link is not displayed.

The person whose address you list here might receive e-mail messages from shoppers about individual stores or products. Be sure to keep this e-mail address current.

Store Status

This field will say Disabled, Enable, or Preview. The status of the store can be changed by selecting the Manage Status link. For more about managing the status of a store, see ["Store Status Management" on page 173](#).

If a store is in preview mode, a link named "View" also appears in the uStore Status section. When you select this link, a new browser window is opened that displays the store.



Preview mode allows you to see what shoppers will see.

An orange status bar indicates that the store is being displayed in preview mode. You can navigate to categories and products within the store. You can leave preview mode by selecting the Exit Preview Mode button.

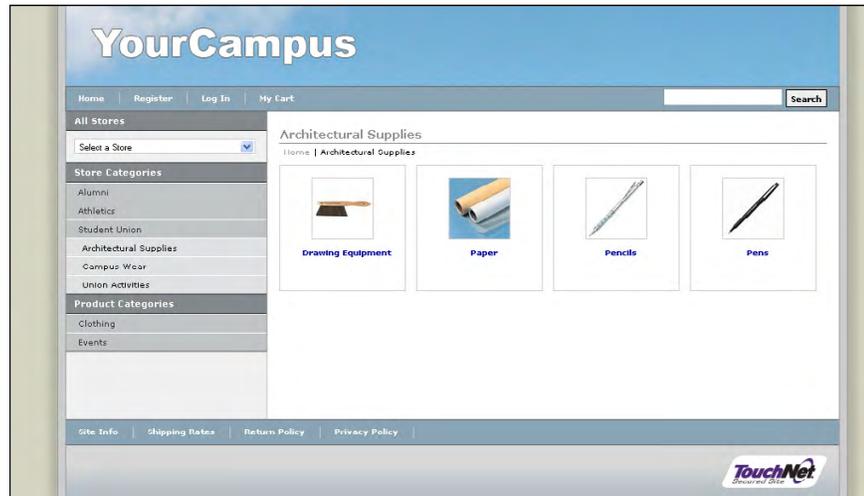
Stores in preview mode are not available for shoppers. Once a store is placed in preview mode, it can only be reached by using the preview link on the Store General Settings page.

Store Home Page Layout

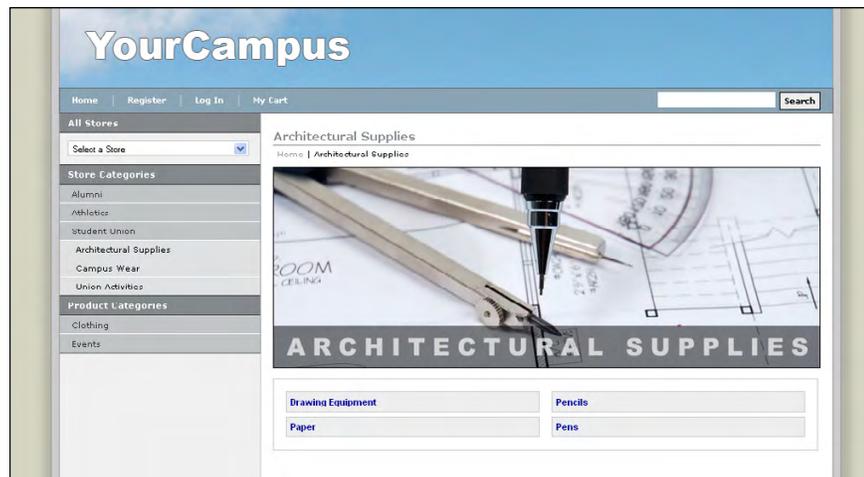
Choose a Store Home Page Layout from the dropdown list. Two options are available:

- **Default**—The default store layout displays thumbnails for each store product category. Products can also be displayed as thumbnails on the store home page.
- **Splash**—The splash page layout combines a splash page image with text links for store product categories.

The following examples show the two layout options for stores:



The default store layout displays thumbnails for each store product category on the store home page. Select products can also be displayed as thumbnails on the store home page.



The splash page layout combines a splash page image with text links for store product categories.

The default layout display of thumbnails is great if you have a small number of products because it allows you to display BOTH products and categories together on the store home page. However, the splash page layout only allows store product categories to be displayed in addition to the splash image, and therefore if you use the splash page layout for your store's home page, you MUST create categories for your store products because the links for the categories will be the ONLY means that shoppers have of navigating to your products (outside of using the mall's product categories or the mall's search functionality).

Important! 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.

Time Zone

Select the time zone that should be used in conjunction with the enabling and disabling of the store and its products. This field **ONLY** affects the enabling and disabling of the store and its products.

Special Announcement**Special Announcement for Stores**

The Special Announcement appears on your store's home page. Use it to let customers know about promotions, sales, store changes, etc. This field accepts HTML. For more information about the allowable HTML tags, see the *Marketplace uStores Layout Guide*.

Note: HTML entered in fields must be properly formatted. It will undergo a validation process and any improperly formatted HTML will not be accepted. We recommend you become proficient in authoring HTML before you attempt to add HTML to fields.

Important! In order to ensure that Marketplace remains a secure environment for processing commerce transactions, fields that accept HTML in the Operation Center will not accept HTML form tags, iframe tags, object tags, and some additional code—including JavaScript.

Email Messages**Email Thank You Statement**

The Email Thank You Statement appears on e-mail messages generated to customers after orders have been placed. This statement appears as the first line of the e-mail message. This statement is also used as the first line of order cancellation e-mail message. Characters entered in this field will appear as text in e-mail messages. (500 characters max.)

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. Characters entered in this field will appear as text in e-mail messages. (5,000 characters max.)

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.

Characters entered in this field will appear as text in e-mail messages. (5,000 characters max.)

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. Characters entered in this field will appear as text in e-mail messages. (5,000 characters max.)

Email Refund Order Announcement

The Email Refund Order Announcement appears on e-mail messages generated to customers after refunds have been issued. Use this announcement field to enter a paragraph that tells customers their refund request has been processed. Characters entered in this field will appear as text in e-mail messages. (5,000 characters max.)

Email Messages Invoice Me	
Email Order Announcement (Invoice Me): (5,000 chars max)	<input type="text"/>
Email Fulfillment Announcement (Invoice Me): (5,000 chars max)	<input type="text"/>
Email Cancel Order Announcement (Invoice Me): (5,000 chars max)	<input type="text"/>
Email To Be Paid Payment Status Change Announcement (Invoice Me): (5,000 chars max)	<input type="text"/>
Email Complimentary Payment Status Change Announcement (Invoice Me): (5,000 chars max)	<input type="text"/>
Email Payment Received Payment Status Change Announcement (Invoice Me): (5,000 chars max)	<input type="text"/>

More settings from the Store General Settings page.

Email Messages Invoice Me

Note: The following fields are available if Invoice Me has been activated on the Administrative General Settings page, as described in "[General Settings](#)" on page 98.)

Email Order Announcement

The Email Order Announcement appears on Invoice Me 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. Characters entered in this field will appear as text in e-mail messages. (5,000 characters max.)

Email Fulfillment Announcement

The Email Fulfillment Announcement appears on Invoice Me 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. Characters entered in this field will appear as text in e-mail messages. (5,000 characters max.)

Email Cancel Order Announcement

The Email Cancel Order Announcement appears on Invoice Me e-mail messages generated when orders are cancelled during the fulfillment process (for example, because an item is no longer available). Use this announcement field to enter a paragraph that tells customers their orders have been cancelled. Characters entered in this field will appear as text in e-mail messages. (5,000 characters max.)

Email To Be Paid Payment Status Change Announcement

The Email To Be Paid Payment Status Change Announcement appears on Invoice Me e-mail messages generated to customers after the status of the order has been changed to "To Be Paid" during fulfillment. Use this announcement field to enter a paragraph that tells customers a balance remains to be paid for the order. Characters entered in this field will appear as text in e-mail messages. (5,000 characters max.)

Email Complimentary Payment Status Change Announcement

The Email Complimentary Payment Status Change Announcement appears on Invoice Me e-mail messages generated to customers after a complimentary payment has been processed. Use this announcement field to enter a paragraph that tells customers a complimentary payment has been applied to their order. Characters entered in this field will appear as text in e-mail messages. (5,000 characters max.)

Email Payment Received Status Change Announcement

The Email Payment Received Status Change Announcement appears on Invoice Me e-mail messages generated to customers after a payment has been processed. Use this announcement field to enter a paragraph that tells customers their payment has been processed. Characters entered in this field will appear as text in e-mail messages. (5,000 characters max.)

Donation Notification	
To send donation notifications, enter email address. For multiple email addresses use a comma as a separator.	
Email addresses: (500 chars max)	<input type="text"/>
Digital Files	
Total Digital File Space Used By Store (bytes):	169
Total Size Available for Digital Files (bytes):	0
Admin Settings	
Allow Partial Refunds:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Allow The Refunding Of Shipping:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Allow Recurring Payments On Donation Product Type:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Accounting code is required to complete updates to the General Ledger.	
Perform General Ledger Updates:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Cashier ID:	<input type="text" value="153"/>
Default Accounting Code:	<input type="text" value="[common] State and Local Taxes"/> ▼
Return Policy Settings	
Return Policy: (5,000 chars max) (HTML Allowed)	<input type="text"/>
<input type="button" value="Save"/>	

More settings from the Store General Settings page.

Donation Notification

Email addresses

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 these e-mail addresses. Use a comma to separate these e-mail addresses.

Digital Files

Total Digital File Space Used By Store

Displays the total file space (in bytes) used by this store's digital products.

Total Size Available for Digital Files

Displays the total file space (in bytes) 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 122. If your store needs more total file space for digital products, contact the Marketplace administrator.

Admin Settings

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 a Refund" on page 384.](#))

Allow The Refund 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 Donation Product Type

To allow donors to use recurring payments with donation products, select Yes. This option must be enabled before donation products can be configured to offer recurring payments.

Perform General Ledger Updates

Select Yes to activate general ledger reporting for the store.

Important! If you are considering selecting Yes for Perform General Ledger updates, **please see ["General Ledger Information" on page 507](#) for detailed information on general ledger configuration.** The "General Ledger Information" section contains critical information for each supported general ledger system. You will NOT be able to complete general ledger configuration without following the instructions in the "General Ledger Information" section.

Cashier ID

For Banner by Ellucian customers, the Cashier ID field appears. For information about this field, see ["Configuring Store Settings" on page 518.](#)

Tender GL Dist Code

For Colleague by Ellucian customers, the Tender GL Dist Code field appears. For information about this field, see ["Configuring Store Settings" on page 545.](#)

Default Accounting Code

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. For

more information, choose your general ledger system: [Banner](#), [Colleague](#), or [PeopleSoft](#).

Return Policy Settings

Return Policy

A link to the Return Policy page appears in the bottom navigation menu for store pages. When shoppers select the Return Policy link, a modal window is displayed that provides information about the store's return policy. This text can be configured by using the Return Policy field. This same text also appears on the Review Order page of the checkout process.

The screenshot shows the 'Review Order' page with a breadcrumb trail: Home | Cart | Delivery Methods | Address | Payment Methods | Review | Receipt. It features two side-by-side boxes: 'Order Summary' and 'Contact Information'. The 'Order Summary' box lists: Item Total: \$10.00, Tax: \$0.56, Total: \$10.56. The 'Contact Information' box shows the email jdoe@touchnet.com and an 'Edit' button. Below these is the 'Return Policy Agreement' section for 'Campus Wear'. The text includes: 'Thanks for shopping. If you are not entirely satisfied with your purchase, we're here to help.' Under 'Returns', it states: 'You have 30 (change this) calendar days to return an item from the date you received it. To be eligible for a return, your item must be unused and in the same condition that you received it. Your item must be in the original packaging. Your item needs to have the receipt or proof of purchase.' Under 'Refunds', it states: 'Once we receive your item, we will inspect it and notify you that we have received your returned item. We will immediately notify you on the status of your refund after inspecting the item. If your return is approved, we will initiate a refund to your credit card (or original method of payment). You will receive the refund within 5-10 business days.' A yellow banner at the bottom of the agreement reads: 'By clicking Submit Order, I agree to the above Return Policy'. At the very bottom are 'Submit Order' and 'Print Agreement' buttons.

Here is an example of the Return Policy section that will appear to customers on the Review Order page of the uStores checkout process.

TouchNet strongly recommends that each store develop a return policy. This policy should cover all of your store's products. Note any individual differences as appropriate in the product descriptions.

This field accepts HTML. We recommend the use of `<h2>` tags for header text and `<p>` tags for body text. However, with the use of style sheet changes you can further modify the layout of return policy text.

Keep in mind that the HTML you enter in this field will appear on two different pages: 1) the Return Policy modal window and 2) the Return Policy Agreement section of the Review Order page during the checkout process. Therefore, any style sheet modifications will need to work for both pages.

For more information about the allowable HTML tags, see the *Marketplace uStores Layout Guide*.

Note: If the customer's cart contains products from multiple stores, the return policies for all the corresponding stores will be displayed in the Return Policy Agreement section of the Review Order page of the checkout process. Likewise, the return policies will be combined on the Return

Policy modal window (which appears when customers click the Return Policy link in the bottom navigation menu).

The screenshot shows a web interface titled "Store Category Assignments". It has two list boxes. The first list box, labeled "Current:", contains the item "Alumni". The second list box, labeled "New assignment:", contains the items "Athletics", "English Department", "Music", and "Student Union". Below these list boxes are two buttons: "Remove Current Selected" and "Add New Assignment".

The Store Category Assignments fields on the Store General Settings page.

Assigning a Store to a Mall-level Store Category

Stores can be assigned to mall-level store categories. Administrators are responsible for creating the mall-level store categories, as described on **"Store Categories" on page 109**. Store managers then select the appropriate categories for their stores.

The Marketplace Store Category Assignments fields appear at the bottom of the Store General Settings page. The available mall-level store categories appear in the New Assignment list box. To assign a store to a category, select the category name from the New Assignment list box and then click the Add New Assignment button. You can CTRL + click multiple store categories or SHIFT + click a range of store categories. After you click the Add New Assignment button, the selected categories will be moved to the Current list box.

Removing a Store from a Mall-level Store Category

Once assigned to mall-level store categories, stores can be easily removed from categories.

The current mall-level store category assignments are displayed in the Marketplace Store Category Assignments fields at the bottom of the Store General Settings page. The current assignments appear in the Current list box. To remove a category assignment, select the category name from the Current list box and then click the Remove Current Selected button. You can CTRL + click multiple store categories or SHIFT + click a range of store categories. After you click the Remove Current Selected button, the selected categories will be moved to the New Assignment list box.

4.3 Store Status Management

Store managers are responsible for managing whether stores are online or offline. Store managers can also delete stores. In addition, a store manager

can place a store in preview mode.

Store managers can change the status of a store or schedule a status change by using the Store Status Management page. To view the Store Status Management page, go to Marketplace Home > [Merchant] > Stores > [Store] > Store Settings > Status Management. The Store Status Management page then opens.

Store 1 Status Management

Settings on this page manage updating and scheduling store status

Print Page

Back To General Settings

Update Current Status

Store Status	Mobile Store Status	POS Store Status	Action
Enabled ▼	Enabled ▼	Enabled ▼	Delete

Store Outage Message

Store Outage Message for Stores: (500 chars max)

Save

Schedule Status Update

Schedule Store Status: 24-hour (example: 00 for Midnight) Store Time Zone: Central Standard Time	Current status: Enabled New status: <input type="text"/> Update Status Date: <input type="text"/> Update Status Hour: <input type="text"/>
--	--

Save Schedule

Scheduled Status Updates

No Scheduled Status Updates

Scheduled Status History

<input type="checkbox"/> Select All	Update	Scheduled Status	Scheduled Date	Scheduled Hour
<input type="checkbox"/>	STORE	Enabled	6/10/14	9:00

Delete History

The Store Status Management page allows you to schedule status changes.

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 Store Status Management page for the store and choosing the ONLINE status option. Unless you choose ONLINE, your store will remain offline and unavailable to shoppers.

Updating the Current Store Status

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

Important! Make sure the store settings have been finalized and products have been configured before you enable your store.

To update the current store status, use the following instructions:

- 1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Status Management. The [Store] Status Management page appears. The "Update Current Status" section allows you to change the store status immediately.

Update Current Status	
Store Status	Action
Enabled <input type="button" value="v"/>	Delete

- 2 Choose a status from Store Status dropdown list. The following choices are available:
 - **Enabled**—Once a store is enabled, the store is available for shoppers.
 - **Disabled**—When a store is disabled, shoppers will not be able to shop at this store. The store will not appear in the Marketplace uStores mall.
 - **Preview**—Stores in preview mode are not available to shoppers and do not appear in the Marketplace uStores mall. Once placed

in preview mode, a store can only be viewed by using the View link on the Store General Settings page. Preview mode can be used to view how a store will look and function before you bring the store online.

You can also schedule status changes for specific dates and hours. For more information, see "[Scheduling Status Updates](#)" on page 178.

Note: You can also change the current store status by using the Store Status dropdown menus on the Marketplace Operations Center home page.

Using Preview Status

You can use preview status functionality to view how a store will look and function before bringing the store online. Using preview status is particularly important if you have made modifications to the style sheet of a store in single-store mode: once you make the style sheet modifications, you can use preview mode to see the effects of the style sheet modifications.

After you have changed the status of a store to PREVIEW, you can view the store by navigating to Marketplace Home > [merchant] > Stores > [store] > Store Settings > General.

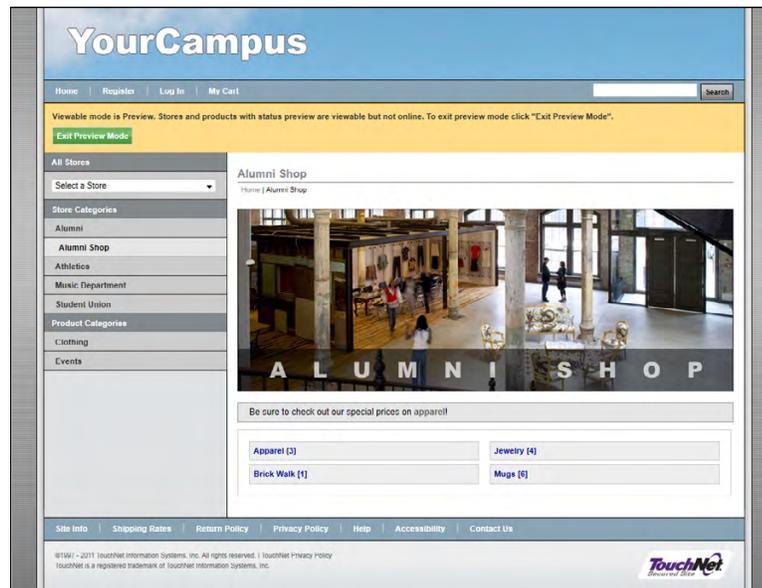
Store status:	<p>PREVIEW View Manage Status</p>
---------------	---

You can click the View link in the Store status row to launch a preview window.

If a store is in preview mode, a link named "View" appears in the uStore Status section. When you select this link, a new browser window is opened that displays the store.

Note: The View link is also available on the Marketplace Operations Center Home page and the Store Status Management page.

When you click the "View" link, a new browser window (or tab) is opened and the store home page is displayed.



Preview mode allows you to see what shoppers will see.

An orange status bar indicates that the store is being displayed in preview mode. You can navigate to categories and products within the store. You can leave preview mode by selecting the Exit Preview Mode button.

Stores in preview mode are not available for shoppers. Once a store is placed in preview mode, it can only be reached by using the "View" link in the Marketplace Operations Center.

Adding an Outage Message

If you disable a store, customers will not be able to navigate to the store via links automatically generated on the Marketplace mall. These links will no longer be available. However, customers may still navigate to the store by using a saved bookmark, a link in an e-mail message, a link in a search engine results page, or a link on a campus web page (or any other hyperlink). In this situation, the customer will see an outage message. If no outage message has been configured, this message says, "We're sorry. You have reached a page that is not available."

You can configure the text that will appear as the outage message. To configure this message, use the "Store Outage Message for Stores" field on the Store Status Management page.

This field does not accept HTML.

Scheduling Status Updates

In addition to immediately changing the status of a store by using the Store Status dropdown on the Store Status Management page, you can schedule a status update by using the Schedule Status Update section of this same page.

You can schedule a status change by using the Store Status Management page.

To schedule an update to store status, use the following instructions:

- 1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Status Management. The [Store] Status Management page appears.
- 2 Select a store status from the "New status" dropdown menu of the Schedule Status Update section. For more information about the store status options, see ["Updating the Current Store Status" on page 175](#).
- 3 Enter a date in the "Update Status Date" field (or select the calendar icon to choose a date using the calendar widget). If you enter a date, you must use this format: mm/dd/yy. For example, enter October 29, 2014 as **10/29/14**.
- 4 Select an hour from the Update Status Hour dropdown menu. This dropdown shows hours in military time. For example, to choose 11 p.m. as the Update Status Hour, select **23**.
- 5 Choose the Save Schedule button.

Once a status update has been scheduled, it appears in the Schedule Status Updates table.

Update	Scheduled Status	Scheduled Date	Scheduled Hour	Action
STORE	Disabled	1/10/13	1:00	Delete
STORE	Enabled	1/11/13	1:00	Delete

Scheduled Status History
No Scheduled Status History

Scheduled status updates appear in this table.

You can remove a scheduled status update by selecting the Delete link in the Action column. You can remove status history by selecting the items to delete and clicking the Delete History button.

Deleting a Store

To delete a store, use the Update Current Status section of the Store Status Management page.

Update Current Status	
Store Status	Action
Enabled <input type="button" value="v"/>	Delete

You can delete a store by using the Update Current Status section.

Simply select the Delete Store link. A prompt will ask you to confirm the deletion of the store.

4.4 Text Messaging

Store managers determine the content of text messages sent to their customers. This information is maintained on the Automatic Message Content page.

To view the Text Messaging page, go to Marketplace Home > [Merchant] > Stores > [Store] > Text Messaging. The Automatic Message Content page then opens.

Alumni Donations Text Messages		
Change the text of text messages that your users receive.		
Text Messages		
Text Message Usage	Text Message Subject Line	Action
Order Confirmation		Edit
Order Fulfillment	Your On-line Order	Edit
Order Cancellation	Order Cancellation	Edit
Refund Processed	Refund Processed	Edit

The Automatic Message Content page is used to maintain text message content.

There are four types of messages:

- Order Confirmation messages
- Order Fulfillment messages
- Order Cancellation messages
- Refund Processed messages

Note: In order for text messaging to be available for your customers, administrative setup must be done. This setup must be done in order to establish the text message carriers. You should check with a Marketplace administrator to determine if this setup has been completed. This administrative setup is described in ["Text Messaging" on page 124](#).

To Edit Text Message Content

To edit text message content, click the Edit link of the corresponding message type on the Automatic Message Content page. The Edit Text Message Content page then appears.

The Edit Text Message Content is used for editing text message content.

The following customizations can be made for each text message type:

- **Subject Line**—This subject line will be assigned to the text message. Please keep in mind that many devices do not display the subject line and any characters devoted to the subject line are subtracted from the maximum character allotment (160 characters) of the text message.
- **Text Message**—This text will be sent as the body of the message. The total maximum number of characters for a text message is 160; however, 78 characters are reserved for the Detail lines (as described below) when all the Detail lines are used. This means the Text Message field is typically limited to 82 characters maximum.
- **Specific details that appear in the text message**—You can determine which details to send with the text message. This information includes customer name, store name, order ID number, and the dollar total. Use the checkboxes to determine which fields to include with your text messages.

As you enter text for the subject line and the text message AND as you select the specific order details to include in the message, the **Maximum characters left** field keeps track of how many characters remain available. A maximum of 160 characters can be sent in text messages, so you must

pay attention to the number of characters that you are using. Marketplace will not allow you to exceed 160 characters.

4.5 Single-Store Mode

Marketplace provides opportunities for customizing stores through the use of single-store mode. These customizations can have a major impact on the customer experience, particularly the use of customized style sheets and optional HTML.

Stores may use single-store mode for simple changes to button text (e.g., changing "Add to Cart" to "Make a Gift" or changing the word "buyer" to "donor"), or single-store mode can be used to customize the look and feel of a store completely (e.g., with new background images and colors specified in a customized style sheet).

For examples of stores in single-store mode, see ["What Shoppers See: Single-Store Mode"](#) on page 74.

Single-Store Settings

To view the General Settings page, make the following selections in the left navigation menu:

Navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Single Store.

Store 1: Single Store Settings

Print Page

Settings determine accessibility and display for single stores. Single store does not apply to Mobile.

General Settings

Id :	1
Name:	Store 1
Use Single Store Mode:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Store Is Viewable In Mall:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Single Store Mode uses customized style sheets, layouts and links. Upon selection, store is entered but mall is exited. Navigation back into the mall is available only by the browser back button.	
When viewable in mall, display the store in this mode:	<input type="radio"/> Single store mode <input checked="" type="radio"/> Mall mode
Shown in pop-up to let shoppers know they are exiting the mall for a store in Single Store Mode (250 chars max):	<div style="border: 1px solid #ccc; height: 30px; width: 100%;"></div>

Display Settings

Show Cart Quantity:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show Promotional Code:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show Shipping Rates:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show Registration:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show Store Header Image:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show Store Name In Header:	<input type="radio"/> Yes <input checked="" type="radio"/> No

Social Media Settings

Name	Display In Header?	Display In Footer?	URL (format: https://www.SocialMediaExample.com)	Sort Key
Facebook	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input style="width: 90%;" type="text"/>	<input style="width: 50%;" type="text"/>
LinkedIn	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input style="width: 90%;" type="text"/>	<input style="width: 50%;" type="text"/>
Twitter	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input style="width: 90%;" type="text"/>	<input style="width: 50%;" type="text"/>

Complete the following fields:

General Settings

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 241](#).

Store Name

The Store Name appears in the Operations Center and in financial reports. You can change this value on the [store] General Settings page.

Use single store mode

To activate single-store mode, select the "Yes" radio button. Single-store mode allows you to establish stores that are not necessarily part of the uStores mall. Customization options are available for stores in single-store mode that are not otherwise available. These customizations involve look-and-feel options as well as modifications to selected button/link text. In addition, options are available for showing/hiding some of the page elements. For examples of using single-store mode, see ["What Shoppers See: Single-Store Mode" on page 74](#).

Store is Viewable in Mall

The "Store is Viewable in Mall" option determines if a link to the store appears in the uStores mall. If you select the "Yes" radio button, customers can reach the store either by using the store URL or by selecting the store link on the uStores mall. If customers reach the store by navigating directly with the URL (as described in ["Linking to a Store" on page 241](#)), the customers will see the single-store mode customizations. However, if customers reach the store by selecting a link on the uStores mall, the store will NOT use single-store mode customizations (unless the "When viewable in mall, display the store in this mode" option is also set to "Single store mode").

If you select the "No" radio button, customers will ONLY be able to reach the store by using the store URL.

When viewable in mall, display the store in this mode

If the "Store is Viewable in Mall" option has been set to Yes, you can use the "When viewable in mall ..." option to specify the display mode for the store when it is reached via a link on the uStores mall. If this option is set to "Mall mode," the store will appear WITHOUT single-store mode customizations. If this option is set to "Single store mode," the store will appear WITH single-store mode customizations. For more about this option, see ["The Display-the-Store-In-This-Mode Option" on page 191](#)

When linking to a store in single store mode from the mall, display the following text in a pop-up message to indicate shoppers are leaving the mall

Only applicable when "Link to Single Store From Mall" is Yes.

Display Settings**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.

Note: The Show Cart Quantity field does NOT affect whether the store pages ask the customer to select a quantity of the product that they are ordering. Donation products and digital download products do not ask for the customer to select a quantity; however, the "generic" product type, which is typically used for physical products (hats, t-shirts, etc.) and events (such as event registrations), does ask for the customer to select a quantity.

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 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 Header Image

In the header area of stores in single-store mode, you can add an image that replaces the mall-level header image. If you choose the "Yes" radio button, be sure to use the [Store] Images page to upload a store header image, as described in "[Images](#)" on page 206.

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.

Social Media Settings

Name

Three social media types are available: Facebook, LinkedIn, and Twitter. When this functionality is turned on (via the "Display in Header?" field and the "Display in Footer?" field), customers will see links for social media functionality appear on the store's home page.

Display in Header? and Display in Footer?

These fields affect the display of social media on the store's home page. Stores in single-store mode do not use the "Social Media Mall Settings"

established in the System Administrative settings (as described in "**Social Media Settings**" on page 126). Stores in single-store mode have separate configuration settings for social media.

You can designate whether social media links should appear at the top of the main content area (Display in the Header?) or the bottom (Display in the Footer?). If necessary, you can display social media links in *both* the header and footer.

URL

If you select Yes for displaying a social media type in either the header or footer, you must enter a URL. This URL will be used when a customer clicks the social media icon. For example, each school typically has their own Facebook page, so you should determine the URL for your school's Facebook page (or the store's Facebook page) and then enter this value in the URL field of the Social Media Mall Settings section. Likewise, if you select to display LinkedIn and Twitter links, you must determine the URLs for your school's LinkedIn site and its Twitter site (or your *store's* LinkedIn site and its Twitter site).

Sort Key

You can use the Sort Key column to determine the display order for the social media icons on the store home page.

Alternate Text Settings	
Alternate "Add to Cart" Text:	<input type="text" value="test"/>
Alternate "Shopping Cart" Text:	<input type="text"/>
Alternate "Continue Shopping" Text:	<input type="text"/>
Alternate "Checkout" Text:	<input type="text"/>
Alternate "Order" Text:	<input type="text"/>
Alternate "Buyer" Text:	<input type="text"/>
Layout Settings	
Header (10,000 chars max): (HTML Allowed)	<input type="text"/>
Left Navigation (10,000 chars max): (HTML Allowed)	<input type="text"/>
Footer (10,000 chars max): (HTML Allowed)	<input type="text"/>
Return Policy Settings	
Return Policy when disabled will remove the return policy from the footer and at checkout.	
Show Return Policy:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Use Mall Return Policy Label:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Return Policy Label:	<input type="text" value="Return Policy"/>

Alternate Text Settings

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.

Layout Settings

Header

The text or HTML entered in this field will appear in the header area of the Marketplace shopping application. This text will only appear for stores displayed in single-store mode. 10,000 characters maximum.

Left Navigation

The text or HTML entered in this field will appear in the left navigation area of the Marketplace shopping application. This text will only appear for stores displayed in single-store mode. 10,000 characters maximum.

Footer

The text or HTML entered in this field will appear in the footer area of the Marketplace shopping application. This text will only appear for stores displayed in single-store mode. 10,000 characters maximum.

Note: HTML entered in the header, left navigation, and footer fields must be properly formatted. It will undergo a validation process and any improperly formatted HTML will not be accepted. We recommend you become proficient in authoring HTML before you attempt to add HTML to these fields. For more information about using HTML or CSS, please see the *Marketplace uStores Layout Guide*.

Important! In order to ensure that Marketplace remains a secure environment for processing commerce transactions, fields that accept HTML in the Operation Center will not accept HTML form tags, iframe tags, object tags, and some additional code—including JavaScript.

Return Policy Settings

Enable Return Policy

By default, the Review Order page of the checkout process displays the Return Policy Agreement for your store. However, if display of the Return Policy Agreement is not appropriate for your store, you can turn off the display of the Return Policy Agreement in uStores by selecting No for the Enable Return Policy option.

The display of return policy is typically required by credit card regulations. However, if your store does not accept credit cards, or if the credit cards that you accept do not require the display of a return policy, then you may consider disabling the display of a Return Policy Agreement.

Important! Before you choose No for the Enable Return Policy option, we strongly recommend that you contact your credit card processor about credit card regulations and determine whether display of the return policy is required.

The screenshot shows the 'Review Order' page with a breadcrumb trail: Home | Cart | Delivery Methods | Address | Payment Methods | Review | Receipt. The page is divided into several sections:

- Order Summary:** A table showing Item Total (\$10.00), Tax (\$0.56), and Total (\$10.56).
- Contact Information:** A box containing the email address 'jdoe@touchnet.com' and an 'Edit' button.
- Return Policy Agreement:** A section with a green header 'Campus Wear'. It contains the following text:
 - Thanks for shopping. If you are not entirely satisfied with your purchase, we're here to help.
 - Returns:** You have 30 (change this) calendar days to return an item from the date you received it. To be eligible for a return, your item must be unused and in the same condition that you received it. Your item must be in the original packaging. Your item needs to have the receipt or proof of purchase.
 - Refunds:** Once we receive your item, we will inspect it and notify you that we have received your returned item. We will immediately notify you on the status of your refund after inspecting the item. If your return is approved, we will initiate a refund to your credit card (or original method of payment). You will receive the

At the bottom of the Return Policy Agreement section, there is a yellow bar with the text: 'By clicking Submit Order, I agree to the above Return Policy'. Below this bar are two buttons: 'Submit Order' and 'Print Agreement'.

Here is an example of the Return Policy section that will appear to customers on the Review Order page of the uStores checkout process.

Use Mail Return Policy text

Instead of using the text configured in the Text for Return Policy field in single-store settings (see below), you can use the text configured for the mall on the General Settings page.

Text For Return Policy

The words "Return Policy" appear in the bottom navigation menu for stores, as well as during the checkout process. If this language does not fit the needs of your store, you can use the "Text for Return Policy" field to enter alternative text.

This field is NOT for the body text that appears for customers as the Return Policy Agreement (either on the Review Order page of the checkout process or on the Return Policy Agreement modal window). The body text for the Return Policy agreement is maintained on the General Settings page of stores, as described in **"General Settings" on page 162**.

Privacy Link Settings	
Show Privacy Link:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Use Mall Privacy Link Settings:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Privacy Link Label:	<input type="text"/>
Privacy Link URL:	<input type="text"/>
Privacy Text (50,000 chars max): (HTML Allowed)	<div style="border: 1px solid #ccc; height: 100px;"></div>

Help Link Settings	
Show Help Link:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Use Mall Help Settings:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Help Link Label:	<input type="text"/>
Help Link URL:	<input type="text"/>
Help Text (50,000 chars max): (HTML Allowed)	<div style="border: 1px solid #ccc; height: 100px;"></div>

Accessibility Link Settings	
Show Accessibility Link:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Use Mall Accessibility Link Settings:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Accessibility Link Label:	<input type="text"/>
Accessibility Link URL:	<input type="text"/>
Accessibility Text (50,000 chars max): (HTML Allowed)	<div style="border: 1px solid #ccc; height: 100px;"></div>

You can use HTML in the Privacy, Help, and Accessibility fields

Privacy/Help/Accessibility Link Settings

Enable [Privacy/Help/Accessibility] Link

Separate sections for Privacy, Help, and Accessibility allow you to manage these links and the informational pages that the links reference. By enabling each of these links, you determine if these links will be displayed in the bottom navigation menu. Stores in single-store mode can be configured with their own status for the Privacy, Help, and Accessibility links.

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 shoppers from the Privacy Policy link in uStores.

In addition, TouchNet strongly recommends that you develop policies regarding user accessibility. These policies should be available for shoppers from the Accessibility link in uStores.

Use Mall Settings for [Privacy/Help/Accessibility Link] Link

For the Privacy, Help, and Accessibility links, you can either use the settings that were established at the mall-level (in which case, select "Yes") or establish override values for the store (in which case, select "No"). For more about the mall-level settings, see "[General Settings](#)" on page 98.

If you select "No," the values you enter for the next three fields will be used. If you select "Yes," the values for the next three fields are not used.

Text for [Privacy/Help/Accessibility Link] Link

The text for the Privacy, Help, and Accessibility links can be customized to meet the meetings of your installation of Marketplace. The alternate text that you enter in these fields will appear in the bottom navigation menu in uStores.

[Privacy/Help/Accessibility Link] URL

An entry in the [Privacy/Help/Accessibility] URL field determines what happens when the shopper selects the corresponding link in the bottom navigation menu of uStores. If an entry is made in this field, a separate browser window will be used for loading the web page targeted by the URL. If no entry is made in this field, the entry in the [Privacy/Help/Accessibility] Text field will be displayed in a modal window.

Note: When you enter a URL, be sure to include "http://" at the beginning of the URL. For example, enter "http://www.statecollege.edu/privacy.htm"; do NOT enter "www.statecollege.edu/privacy.htm". If you do not include "http://" in the URL, the targeted web page will not load in the customer's browser.

[Privacy/Help/Accessibility] Text

You can maintain the privacy policy page, the help page, and the accessibility page by using these fields.

You can enter up to 50,000 characters in each of these fields. These characters may include HTML.

HTML entered in this field must be properly formatted. It will undergo a validation process and any improperly formatted HTML will not be accepted. We recommend you become proficient in authoring HTML before you attempt to add HTML to this field.

Important! In order to ensure that Marketplace remains a secure environment for processing commerce transactions, fields that accept HTML in the Operation Center will not accept HTML comments, form tags, iframe tags, object tags, and some additional code—including JavaScript.

For more information about using HTML or CSS, please see the *Marketplace 6.5 uStores Layout Guide*.

The Store-Is-Viewable-in-Mall Option

Stores in single-store mode can be optionally viewed as part of the uStores mall. This option allows a store to reap the benefits of placement within the mall: the store will appear in the mall's left navigation menu (if the store has been assigned to a store category), the store will appear in the All Stores dropdown menu, and the store will appear on the All Stores tab on the mall home page. In addition, the products for these stores can be placed in mall product categories, and the store's products can be located using the uStores search functionality.

For an example of a store that uses the Store-Is-Viewable-In-Mall, see ["Single-Store Example" on page 74](#).

Store managers turn on the Store-Is-Viewable-In-Mall option on the Single Store Settings page of the Operation Center:

[merchant name] > Stores > [store name] > Store Settings > Single Store

The "Store is Viewable in Mall" option determines if a link to the store appears in the uStores mall. If you select the "Yes" radio button, customers can reach the store either by navigating directly with the store URL or by selecting the store link on the uStores mall.

If you select the "No" radio button, customers will **ONLY** be able to reach the store by using the store URL. The products for this store will not appear in mall product categories, and the store's products **CANNOT** be located using the uStores search functionality. For instructions on how to link to a store in single-store mode, see ["Linking to a Store" on page 241](#).

The Display-the-Store-In-This-Mode Option

The "When viewable in mall, display the store in this mode" option is available if the "Store is Viewable in Mall" option has been set to Yes. The "Store is Viewable in Mall" option determines if a link to the store appears in the uStores mall, which allows a store to reap the benefits of placement within the mall. In turn, the "When viewable in mall, display the store in this mode" option then determines in which mode the store is displayed when shoppers navigate to the store from the mall—mall mode or single-store mode.

If this option is set to "Mall mode," the store will appear **WITHOUT** single-store mode customizations when customers navigate to the store via a link on the uStores mall, which has the effect of making the store look like a

consistent part of the uStores mall—meaning the store loses button/link text changes, hidden page elements (which become visible again), extra HTML (added via the header, left nav, or footer fields), a store header image, and style sheet changes. The store will revert to using the mall's layout for all store pages, including the shopping cart and checkout pages. In addition, the Home button will take the customer to the mall home page. In short, the store will look and function like a regular mall store. However, if a customer navigates directly to the store using the "&SINGLESTORE=true" URL option (as described in "[Linking to a Store](#)" on page 241), the store will appear with all of its single-store mode customizations intact.

If this option is set to "Single store mode," the store will appear WITH single-store mode customizations when customers navigate to the store via a link on the uStores mall. That is, when a customer clicks on a store name link in the left navigation menu of the uStores mall, the customer will leave the mall and enter the store in single-store mode. The store will use all of its single-store-mode customizations. Please keep in mind this means the customer will not see any means on the store pages of navigating BACK to the mall. The store is in true single-store mode, including the cart and checkout pages.

Note: When customers click on a store name in the left navigation menu for a store in single-store mode, the store can optionally display a prompt (configured with the "When linking to a store in store mode from the mall ..." field) that warns customers they are now leaving the uStores mall. As part of this message, you should consider adding text that explains the following: 1) the customer will only be able to navigate back to the mall by using their browser's back button and 2) the customer will lose any items they have already placed in their shopping cart.

Store managers can use the "When viewable in mall, display the store in this mode" option by using the following navigation:

[merchant name] > Stores > [store name] > Store Settings > Single Store

This option was designed to allow the uStores mall to remain a central means of accessing all stores—even when some (or even ALL) stores are in single-store mode. We encourage you to use the uStores mall to present customers with a complete picture of all stores that have been created.

Setting this option to "Mall mode" works well for stores in which the single-store-mode customizations are cosmetic (for example, when style sheet edits change background colors and the page font). However, if the single-store-mode customizations alter the store to better meet the needs of the store's intended audience (for example, changing button text from "Add to Cart" to "Make a Donation"), then setting this option to "Single store mode" may be more appropriate.

Single-Store Style Sheets

The style sheets for stores in single-store mode can be downloaded and uploaded by store managers.

Once a store manager has downloaded a store style sheet, the store manager can modify the style sheet and then upload and activate the style sheet for the store. Store managers can download and upload style sheets by going to the Single Store Settings page of the Operation Center:

[merchant name] > Stores > [store name] > Store Settings > Single Store Style Sheets

Style sheet modifications can be used for a wide range of purposes. Some store managers may simply use style sheet edits to make simple changes to font families or font sizes, while other store managers may use style sheet edits to completely overhaul the look and feel of a store. The latter type of style sheet modification may involve using background colors and images that reflect the store branding. This type of change may be used to make a store look considerably different than the stores that use the mall look and feel.

Important! Any major changes to the style sheets should be performed by an experienced web designer. Faulty CSS code can cause stores to stop loading correctly in the web browsers of your customers.

Campus Wear Single Store Style Sheets

The following settings are used if the store is in single-store mode.

Main Style Sheet

Use this style sheet The following style sheet controls how the mall and stores are displayed. You can download this style sheet. Your revised version of the style sheet can be uploaded. Once uploading a style sheet, you can choose which style sheet to use (the default version, the revised version, or your customized version) by selecting the corresponding radio button. (Filename: marketplace.css)

<input checked="" type="radio"/>	Default main style sheet	Download
<input type="radio"/>	Revised main style sheet	Download
	Customized main style sheet	Upload

Cart Style Sheet

Use this style sheet The following style sheet controls how the cart is displayed. You can download this style sheet. Your revised version of the style sheet can be uploaded. Once uploading a style sheet, you can choose which style sheet to use (the default version, the revised version, or your customized version) by selecting the corresponding radio button. (Filename: checkout_stylesheet.css)

<input type="radio"/>	Default cart style sheet	Download
<input checked="" type="radio"/>	Revised cart style sheet	Download
	Customized cart style sheet	Upload

Single Store Style Sheet

Use this style sheet The following style sheet controls how the single store specific styles are displayed for single store. You can download this style sheet. Your revised version of the style sheet can be uploaded. Once uploading a style sheet, you can choose which style sheet to use (the default version, the revised version, or your customized version) by selecting the corresponding radio button. (Filename: single_store.css)

<input checked="" type="radio"/>	Default single store style sheet	Download
	Customized store style sheet	Upload

Supplementary Style Sheets

Use this style sheet The following supplementary style sheets are available for all stores in single-store mode to use. These style sheets are shared by all stores and can only be downloaded and uploaded at the administrative level. Use the checkbox to select which supplementary style sheets (if any) should be used with this store.

<input type="checkbox"/>	mall-override.css	Download
<input type="checkbox"/>	ferrismods.css	Download
<input type="checkbox"/>	tweaks.css	Download

Additional Store Style Sheets

Use this style sheet You can upload additional style sheets for use by this store. Only style sheets marked as "Use this style sheet" will be used with this store. (Limit of 5)

<input checked="" type="checkbox"/>	leftnavtextFix2.css	Download Upload Remove
<input checked="" type="checkbox"/>	extra3.css	Download Upload Remove
<input checked="" type="checkbox"/>	singlestore3.css	Download Upload Remove
Upload an additional style sheet:		Upload

[Save](#)

Store managers manage style sheets by using the Style Sheet Settings page.

The following types of style sheets can be used by stores in single-store mode:

- **Main Style Sheet**—The main style sheet controls most styles that are needed for displaying your store's home page, category pages, and product pages. You can download this style sheet, modify it, and then

upload your revised version of the file. Once you have uploaded a main style sheet, you must use the "revised" radio button to activate this style sheet. (Required filename: *marketplace.css*)

- **Cart Style Sheet**—The cart style sheet controls how your store's cart and checkout pages are displayed. You can download this style sheet, modify it, and then upload your revised version of the file. Once you have uploaded a cart style sheet, you must use the "revised" radio button to activate this style sheet. (Required filename: *checkout_stylesheet.css*)
- **Single Store Style Sheet**—The single store style sheet contains extra styles that are only used by stores in single store mode. You can download the default version of the single store style sheet, modify it, and then upload your revised version of this file. Once you have uploaded a single store style sheet, you must use the "revised" radio button to activate this style sheet. (Required filename: *single_store.css*)
- **Supplementary Style Sheets**—Up to five supplementary style sheets can be saved at the administrative level. These style sheets can be selectively used by all stores. These style sheets cannot be edited by store managers, only by administrators. Use the checkboxes to select which supplementary style sheets should be used with your store.
- **Additional Store Style Sheets**—You can upload up to five additional style sheets for use by your store. Use the checkboxes to select which additional store style sheets should be used.

Avoid Replacing the Default Store Style Sheets

Marketplace includes functionality that allows you to upload revised store style sheets. However, to help you minimize the amount of work that must be done each time a service pack is released, we suggest you avoid uploading replacements for the default store style sheets. We suggest you instead upload "additional" style sheets that override property values specified in the default style sheets.

Here are the default store style sheets that you should avoid replacing:

- uStores store level – main style sheet (marketplace.css) – Each store has its own version of this file.
- uStores store level – checkout style sheet (checkout_stylesheet.css) – Each store has its own version of this file.
- uStores store level – single store style sheet (single_store.css) – Each store has its own version of this file.

If you avoid replacing the default store style sheets, you will find that the fixes provided by style sheet modifications in service packs will typically take effect upon the installation of the service packs, and as a result, your default style sheets will stay up to date with the changes that we make to Marketplace.

Important! We strongly recommend that you avoid replacing the main style sheet (marketplace.css), checkout style sheet (checkout_stylesheet.css), and the single store style sheet. If you instead use "additional" style sheets, your installation of Marketplace will use the style sheet fixes provided by service packs.

Modifying Style Sheets

Use the following steps for downloading, modifying, and uploading style sheets for your store:

- 1 Click the Download button for the "Default" style sheet" that you would like to edit (or if you have already uploaded a style sheet, click the Download button for the "Revised" style sheet that you need to edit).

Your browser's save window will then appear.

- 2 Save the file.
- 3 Open the downloaded style sheet in the editor of your choice.
- 4 Edit the styles as necessary.

Important! To ensure that Marketplace remains a secure environment for processing commerce transactions, some commonly used CSS code is not allowed in uploaded style sheets. For critical information about the validation process, see ["Single-Store Style Sheets" on page 193](#). And for a complete list of all allowed CSS, see the *Marketplace uStores Layout Guide*, which can be downloaded from the TouchNet Client Community.

5 Save the style sheet.

Use the following file names:

- The main style sheet must be named **marketplace.css**.
- The cart style sheet must be named **checkout_stylesheet.css**.
- The single store style sheet must be named **single_store.css**.

Note: The above file names must be used or Marketplace will not allow you to upload your revised style sheets.

6 Click the Upload button for the corresponding style sheet type.

The Marketplace CSS Upload window appears.

7 Click the Browse button and locate the style sheet that you modified.

8 Click the Upload Now button.

As part of the upload process, Marketplace validates the uploaded style sheet. Any CSS code that Marketplace considers to be invalid will not be accepted. A list of errors will be returned. You must fix these errors before Marketplace will accept your style sheet. We recommend you become proficient in authoring CSS before you attempt to upload style sheets.

Important! For critical information about the validation process, see ["Single-Store Style Sheets" on page 193](#).

9 Select the corresponding "Revised" radio button in order to activate your modified style sheet.

10 Click the Save button.

Using Additional Store Style Sheets

As an alternative to modifying the main style sheet or the single store style sheet (or the cart style sheet), you can use the "Additional Store Style Sheets" feature to upload additional style sheets to be used by your store.

When your store loads in the customer's browser, the main style sheet will load first, followed by the cart style sheet, the supplementary style sheets, the single store style sheet, and finally the "additional" store style sheets. Each style sheet can override the styles in style sheets that have previously loaded. For example, styles in a supplementary style sheet can override

styles in the main style sheet or the cart style sheet. Likewise, styles in an "additional" stylesheet can override styles in the main style sheet, the cart style sheet, supplementary style sheets, and the single store style sheet.

"Additional" store style sheets can also be used to provide new styles for additional HTML that you've added to pages via the numerous fields that allow HTML (such as the Header, Left Nav, and Footer HTML fields for stores in single-store mode).

"Additional store style sheets" might also come in handy if you want to separate store styles into multiple style sheets. You can upload up to five "additional" style sheets for use by your store. Use the checkboxes in the "Use this style sheet" column to select which style sheets should be active and then select the Save button.

Like all style sheets, additional store style sheets must pass a validation process before they can be uploaded. For more information about the validation process, see ["Single-Store Style Sheets" on page 193](#).

Validation of Style Sheets

As part of the upload process, Marketplace validates the style sheet to be uploaded. Any CSS code that Marketplace considers to be invalid will not be accepted. A list of errors will be returned. You must fix these errors before Marketplace will accept your style sheet. We recommend you become proficient in authoring CSS before you attempt to upload style sheets.

In addition, to ensure that Marketplace remains a secure environment for processing commerce transactions, some commonly used CSS code is not allowed by Marketplace in uploaded style sheets.

This code includes (but is not limited to) the following:

- Position attributes with values of "absolute" or "relative"
- JavaScript
- Comments
- And any other code that TouchNet determines may potentially represent a security threat.

If any code in your style sheet does not pass the validation process, Marketplace will prompt you to edit the corresponding lines of your style sheet.

For more about the validation process, see the *uStores Layout Guide*.

For more information about using Marketplace style sheets, including a list of all allowable CSS properties, please see the *Marketplace uStores Layout Guide*, which can be downloaded from the TouchNet Client Community.

Style Sheet Image Management

If the style sheet for a store in single-store mode references any images, a store manager can upload these images by using the Style Sheet Image Management section of the Single Store Style Sheet Settings page:

[merchant name] > Stores > [store name] > Store Settings > Single Store Style Sheets

When this page appears, scroll down until the Style Sheet Image Management section is visible.

Style Sheet Image Management

If you choose to upload images in association with the store and the style sheets listed above, your context will be as follows. An example would be: ../../style_images/store_1/background_primary.gif

Context path: ../../style_images/store_1/

Images

Image Name	Action
SaveOldSmokyT.jpg	<input type="button" value="View"/> <input type="button" value="Remove"/>

Store managers manage images by using the Single Store Style Sheet Settings page.

The top part of the Style Sheet Image Management section describes the context path for images. You will need to use this context path in order to reference the images that you upload.

The lower part of the Style Sheet Image Management section lists the images that have been uploaded. You can use the View button to open the Marketplace View Style Image window with the corresponding image displayed. You can use the Remove button to remove the reference to the image from the Marketplace database.

To upload an image, follow these instructions:

- 1 Select the Upload Image button.

The Marketplace Image Upload window then appears.

Uploading for Store: Campus Wear

Enter path of the file to upload (JPEG, GIF, or PNG only):

(maximum file size is 250000 bytes)

The Marketplace Image Upload window allows for a single image to be uploaded.

- 2 Select the Browse button.
- 3 Locate the image to be uploaded.
- 4 Select the Upload Now button.

The image name now appears in the Style Sheet Image Management section of the Single Store Style Sheet Settings page. You can use the View button to the right of the image name to view this image.

Important! Be sure to make note of the context path described in the Style Sheet Image Management section. You must have this context path in order to reference an uploaded image from a style sheet.

Important! It is your responsibility to ensure that you have all necessary rights for the images you upload. Images that you did not create (such as images on other web sites) are typically protected by copyright law and should not be uploaded for use in Marketplace unless you have received permission from the copyright holder.

4.6 Store User Roles

The store user roles include:

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

And here are descriptions of the duties that these user roles can take:

Store User Roles

User Role	What They Can Do
Store Manager	<ul style="list-style-type: none"> • Manage general store settings • Bring stores online and take stores offline (and schedule status changes) • Configure text messages • Configure stores to run in single-store mode • Upload splash and side banner images, and for stores in single-store mode, upload header images • Upload additional images for use with style sheets • Download, upload, and activate style sheets for stores in single-store mode • Configure shipping classes and rates • Configure store product categories • Add and edit products • Configure an additional donation to be offered during checkout • Schedule status changes for products • Move products between categories • Configure payment methods that are allowed with user groups • Configure user modifiers • Activate the Marketplace tax service and configure which states use this service • Grant the store clerk, fulfiller with refund/cancel rights, and fulfiller user roles to other users • View Marketplace financial reports for the store
Store Clerk	<ul style="list-style-type: none"> • Add and edit products in their assigned store and move products among categories

User Role	What They Can Do
Fulfiller with Refund/Cancel Rights	<ul style="list-style-type: none"> • Fulfill orders • Refund orders • Cancel orders • For orders made with an ACH payment method, override the waiting period and proceed with fulfillment
Fulfiller	<ul style="list-style-type: none"> • Fulfill orders
Store Accountant	<ul style="list-style-type: none"> • View Marketplace financial reports for the store. <p>Note: Accountants cannot make any changes to store site settings or assign user roles.</p>

Managing Store Users

Follow these steps to manage store users and their roles.

- 1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Store Users. The [Store] Users by Role page appears.

Alumni Donations Users by Role

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

[View U.Commerce Users](#)

Store Managers

Show 10 entries Search:

Full Name	U.Commerce Username	Marketplace Status	Action
Ash, Melissa		Enabled (Disable)	Edit User
Johnson, Gary	tndv.gjohnson	Enabled	Edit User
Johnson, Gary		Enabled (Disable)	Edit User
Stillwagon, Ron	tndv.rstillwagon	Enabled (Disable)	Edit User

Showing 1 to 4 of 4 entries First Previous 1 Next Last

Fulfillers With Cancel/Refund Rights

Show 10 entries Search:

Full Name	U.Commerce Username	Marketplace Status	Action
Johnson, Gary		Enabled (Disable)	Edit User
Stillwagon, Ron	tndv.rstillwagon	Enabled (Disable)	Edit User

Showing 1 to 2 of 2 entries First Previous 1 Next Last

Fulfillers

Show 10 entries Search:

Full Name	U.Commerce Username	Marketplace Status	Action
Stillwagon, Ron	tndv.rstillwagon	Enabled (Disable)	Edit User

Showing 1 to 1 of 1 entries First Previous 1 Next Last

- The Users by Role page 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 accountants. This page allows for the following actions:
 - Grant store user roles to U.Commerce Users**—Merchant managers and store managers can give other U.Commerce users the roles of store clerk, fulfiller, fulfiller with cancel/refund rights, and store accountant by choosing the "View U.Commerce Users" button near the top of the page and then editing roles for the corresponding users. For detailed instructions, see Section , "Adding Store Users" on page 204.
 - Send e-mail to the user**—You can send an e-mail message to a store user by clicking the user's name in the Full Name column. This action will open a new e-mail message in your default e-mail software application with the user's e-mail address inserted in the To field.
 - Enable or Disable the user**—You can edit the status of a user by clicking the Enabled or Disabled text link in the Marketplace Status column.

- **Edit user**—You can edit a user’s role by choosing the "Edit User" text link in the Action column. For detailed instructions, see Section , "Editing Store Users" on page 205.

Adding Store Users

All users that have been added to U.Commerce are potential Marketplace users. If a user has not yet been added to U.Commerce, that user must be added to U.Commerce with U.Commerce's User Management application before that user can be configured with Marketplace roles.

Typically, not all U.Commerce users will have access to User Management in U.Commerce, so you may find the duty of creating a new U.Commerce user will need to be handed off to a User Management administrator.

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

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

- 1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Users. The [Store] Users by Role page appears.
- 2 Click the View U.Commerce Users link near the top of the page. The U.Commerce Users page appears.
- 3 Find the corresponding user and then click the Edit User text link in the Action column. The Edit User page appears.

Edit User

Add or remove user roles. User changes will be effective at next login.

Back To Users

User Status

Status	Enabled
--------	---------

Disable
Remove All User Roles

User Information

U.Commerce Username:	TNDV.dwilliams
First Name:	
Last Name:	
U.Commerce Email:	
Email:	

Marketplace Roles

Assigned Roles	Available Roles
None	<input type="checkbox"/> Fulfiller with cancel/refund rights
	<input type="checkbox"/> Fulfiller
	<input type="checkbox"/> Store Clerk
	<input type="checkbox"/> Store Accountant

Remove Roles
Add Roles

Note: For more information about the store user roles, see "[Store User Roles](#)" on page 200.

- 4 To add a role to the user, click the checkbox for that role in the Available Roles column. The following roles are available: Fulfiller with cancel/refund rights, Fulfiller, Store Clerk, and Store Accountant.
- 5 Click the Add Roles button.
- 6 Notify the user that you have given them a new Marketplace role.

Editing Store Users

Follow these steps to edit user roles for store managers, store clerks, fulfillers, fulfillers with cancel/refund rights, and store accountants.

Note: Only store managers can edit these roles.

- 1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Users. The [Store] Users by Role page appears.
- 2 Find the corresponding user and then click the Edit User text link in the Action column. The Edit User page appears.

Edit User

Add or remove user roles. User changes will be effective at next login.

[Back To Users](#)

User Status

Status	Enabled
--------	---------

User Information

U.Commerce Username:	TNDV.gjohnson
First Name:	Gary
Last Name:	Johnson
U.Commerce Email:	gjohnson@touchnet.com
Email:	rstillwagon@touchnet.com

Marketplace Roles

Assigned Roles	Available Roles
Manager	<input type="checkbox"/> Fulfiller
<input type="checkbox"/> Fulfiller with cancel/refund rights	<input type="checkbox"/> Store Clerk
	<input type="checkbox"/> Store Accountant

[Save](#)

- 3 To add a role to the user, click the checkbox for that role in the Available Roles column. The following roles are available: Fulfiller with cancel/refund rights, Fulfiller, Store Clerk, and Store Accountant.

OR

To remove a role, click the checkbox for that role in the Assigned Roles column.

Note: For more information about the various user roles, see "[Marketplace Users](#)" on page 14.

- 4 Click the Save button.

4.7 Images

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

- 1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Images. The [Store] Image Settings page 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 Side Banner section.

- 2 Upload a side banner.

The side banner 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 header 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 style sheet (*marketplace.css*) has been modified to increase the width of this area, a wider side banner may

be acceptable. For more information about Marketplace style sheets, see the *Marketplace uStores Layout Guide*.

3 Upload your store header 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 header image (on the [Store] General Settings page). In this case, the store header 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 241). 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 header image will appear, not the store header 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 680 pixels; however, if the uStores style sheet (*marketplace.css*) has been modified to increase the width of this area, a wider splash image may be acceptable. Likewise, if the style sheet 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 style sheets, see the *Marketplace uStores Layout 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.

- Side banners are best displayed at a pixel size of 150 (width) x 300 (height).
- Store header images are best displayed at a pixel size of 960 (width) by 100 (height).
- Splash images are best displayed at a pixel size of 680 (width) x 280 (height).
- All images must have file sizes of 250K or less.

Important! It is your responsibility to ensure that you have all necessary rights for the images you upload. Images that you did not create (such as images on other web sites) are typically protected by copyright law and should not be uploaded for use in Marketplace unless you have received permission from the copyright holder.

4.8 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 left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Payment Methods. The Payment Methods page appears.

Parking Passes 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 Information

Host System Account:	MP Host System
----------------------	----------------

Default Payment Methods

Payment Method for New Products	Sort Key
<input type="checkbox"/> AmEx	<input type="text"/>
<input type="checkbox"/> Discover	<input type="text"/>
<input type="checkbox"/> INTERAC	<input type="text"/>
<input type="checkbox"/> MasterCard	<input type="text"/>
<input type="checkbox"/> Visa	<input type="text"/>
<input type="checkbox"/> webCheck	<input type="text"/>

- 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 360) 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 223.

Notes on Payment Methods

Marketplace uStores accepts credit cards, campus cards, Interac Online, Invoice Me, and electronic check (ACH). The payment methods that are available for a store depend on the configuration of the Payment Gateway host system account that is used by the corresponding Marketplace merchant.

Note: In addition, schools that use the Banner by Ellucian system for general ledger functionality can use departmental charge as a payment method.

Credit Cards Accepted by Marketplace

Credit Card Name	Name Displayed to Buyers
MasterCard	MasterCard
Visa	Visa
American Express	AmEx
Discover Card	Discover
JCB	JCB
Diners Club International	DinersClub
Carte Blanche	CarteBlanche

Credit Card Name	Name Displayed to Buyers
China UnionPay	ChinaUnionPay
DinaCard	Buyers will see icons for these cards if products for which Discover Card is accepted have been added to the shopping cart, but these customers will not see separate payment method selections for DinaCard and BC Card. To use these cards, cardholders must select Discover.
BC Card	

The credit card names displayed to customers are predefined in Payment Gateway and are not editable.

Store managers determine which payment methods to use for each product. For example, a host system account might be configured for MasterCard, Visa, American Express, and ACH, but an individual product might be configured to only use MasterCard and ACH (a subset of the available payment methods).

Marketplace displays icons for each available payment method on the Payment Method page of the checkout process. If Discover is selected as an accepted payment method for a product, customers will also see icons for DinaCard and BC Card, according to Discover Network requirements.

The payment period with recurring payments cannot exceed the expiration date on the customer's credit card.

Important! The Discover Network requires that all merchants that accept the Discover Card must also accept Diners Club, JCB, Carte Blanche, and China UnionPay. For details, please check your agreement with the Discover Network. When you set up payment methods for a product, you should keep this requirement in mind.

Campus Cards Accepted by Marketplace

Campus Card Name	Name Displayed to Buyers
CBORD	Configurable in Payment Gateway
Blackboard	

When these campus cards are configured in Payment Gateway, the name that will be displayed to customers can be configured. For example, if the school wants to use the name "State University Card," then this name can be entered on the Payment Methods page in Payment Gateway.

Interac Online

Name Displayed in Operations Center	Name Displayed to Buyers
INTERAC	Online Payment via INTERAC

Interac Online can only be used by Marketplace merchants that use Canadian banks. Buyers will also see the Interac Online icon, a trademark statement, and a link named "Learn More" that links to www.interaonline.com.

Electronic Check (ACH)

Name Displayed in Operations Center	Name Displayed to Buyers
webCheck	Electronic Check (ACH)

Electronic check (ACH) appears as "webCheck" in the Marketplace Operations Center; however, this payment method appears as "Electronic Check (ACH)" to uStores and uPay customers. Recurring payments with electronic check as the payment method can be set up for up to 99 years.

Important! Merchants that accept electronic check as a payment method should be familiar with NACHA regulations concerning the acceptance of ACH payments, specifically regarding the risk of fraudulent transactions.

Departmental Charge (Banner Only)

Name Displayed in Operations Center	Name Displayed to Buyers
Departmental Charge	Pay with Departmental Charge

Departmental charge must be configured in Payment Gateway as a User Define Payment Method. Then Marketplace can be configured to use this payment method for departmental charge. This payment method is only available as a payment type when the installation of Marketplace has been configured for integration with Banner by Ellucian. This payment method allows uStores customers to transfer budget funds between Banner general ledger accounts. It can be activated for specific user groups and specific products. When the buyer chooses to pay via departmental charge, the buyer must enter a Banner detail code in order to complete the transaction. For more about Departmental Charge, see "[Using Departmental Charges](#)" on page 529.

Invoice Me

Name Displayed in Operations Center	Name Displayed to Buyers
Configurable in Marketplace	Configurable in Marketplace

"Invoice Me" must be configured in Payment Gateway as a User Defined Payment Method. Then Marketplace can be configured to use this payment method for "Invoice Me." Schools can configure the name of this service that will be presented to customers (Admin General Settings).

This payment method can be assigned to specific user groups and products. When a customer chooses the Invoice Me payment method, no assets are exchanged in Payment Gateway. Rather the customer receives an e-mail message that has been configured for use with Invoice Me. The store manager can configure these e-mail messages to provide instructions regarding payments. (And therefore the e-mail message serves as the

"invoice.") Various e-mail messages can be configured for Invoice Me on the Store General Settings page. (For more about these e-mail messages, see **"General Settings" on page 162**. For these fields to appear, Invoice Me must be activated on the Administrative General Settings page, as described in **"General Settings" on page 98**.) When a payment is received, a fulfiller can update the payment status of an Invoice Me order.

4.9 Shipping Classes

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 classes configured for each store.

Shipping classes can be assigned to physically similar products in which similar shipping rates will apply. 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 classes 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 classes for your store.

- 1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Shipping Classes. The Store Shipping Classes page appears.

Campus Wear Shipping Classes

A shipping class is required for product setup. Available delivery methods and tax rates are set up by the administrator.

Add Shipping Class

Shipping Classes

Name	Actions	
regular	Rename Delete	

Shipping Class: regular

All charges are in USD (\$)

Delivery Method	Enable	Base Charge	Additional Item Charge	Shipping Address Required	Allowed Countries	Tax Class
None	<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>	N/A	default tax rate ▾
Walk-In	<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>	N/A	default tax rate ▾
USPS First-Class Mail	<input checked="" type="checkbox"/>	3.00	2.00	<input checked="" type="checkbox"/>	Select Countries	default tax rate ▾
USPS Priority Mail	<input checked="" type="checkbox"/>	18.00	8.00	<input checked="" type="checkbox"/>	Select Countries	default tax rate ▾
USPS Express Mail	<input checked="" type="checkbox"/>	5.00	3.00	<input checked="" type="checkbox"/>	Select Countries	default tax rate ▾

Default Delivery Location:
 City:
 State: ▾
 ZIP / Postal Code:
All U.S. States, Territories and Armed Forces must use ZIP+4 (format: XXXXX-XXXX).

Save regular Shipping Class

- 2 Click the Add Shipping button near the top of the page to set up a new shipping class. A pop-up window will appear in which you must enter the following information:

- **Shipping Class Name**—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 Classes link.

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

- **Default Delivery Location**—You must enter a City, State, and Postal Code. For default locations in the United States and its territories, you must enter a ZIP+4 in the ZIP/Postal Code field.

Important! You must know the ZIP+4 for the default delivery location before you can create a new shipping class.

After you enter the shipping class name, default delivery location, and select the OK button, you will be returned to the Store Shipping Classes page. The Shipping Class that you created will appear in its own Shipping Class table. You must now configure the delivery methods.

- 3 The Shipping Class tables list all the available delivery methods. Use the Shipping Class tables to configure the follow information:

- **Enable**—Choose the Enable checkbox to enable the corresponding delivery method.
- **Base Charge**—Enter a base charge for this delivery method. If just one item is ordered with this delivery method, then the base charge will be the shipping fee (plus applicable taxes). If multiple items are ordered with this delivery method from the same store, one item gets the "Base Charge" and then the "Additional Item Charge" applies to each additional item.
- **Additional Item Charge**— If multiple items are ordered with this delivery method from the same store, one item gets the "Base Charge" and then the "Additional Item Charge" applies to each additional item.
- **Shipping Address Required**—Use this checkbox to require the customer to enter a shipping address when they select this delivery method. For any delivery method in which the item will be physically mailed, you will want to select this checkbox. However, if the item will not be physically mailed, such as items that the customer will pick up or items can downloaded, then you may choose to not require a shipping address.
- **Allowed Countries**—You can select the countries for which the delivery method applies. For example, you cannot ship an item outside the USA using USPS Express Mail. So if you will be allowing international delivery, then you must set up one or more delivery methods that work with the allowed countries.
- **Tax Class**—Choose a tax class to use with the delivery method. 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.

Note: The higher tax rate is not available when the Marketplace tax service is used.

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 about tax classes, see **"Tax Account Codes " on page 120.**

Accounting Code Override

This field appears if general ledger reporting has been turned on for the store. For more information about assigning an override accounting code to a delivery method, choose your general ledger system: [Banner](#), [Colleague](#), or [PeopleSoft](#).

Important! The available delivery methods are determined by configuration at the Marketplace administrative level. If the delivery method that you would like to offer is not available, you must contact a Marketplace administrator to request that delivery method be added, as described in "**Delivery Methods**" on page 117.

- 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.

If the customer is not required to enter a shipping address with the delivery method, then Marketplace will charge the tax based upon the default delivery location associated with the applicable shipping class for the product.

Important! In order for a store manager to turn on the Marketplace tax service, all shipping classes for that store must use ZIP + 4 in the default delivery location for each shipping class.

- 5 Click the Save button.

About Taxes and Shipping Addresses

If a product (or its shipping) is configured for tax, the applicable rate is based upon the shipping address entered by the customer during the uStores checkout process. If the customer was not required to enter a shipping address with the delivery method, then Marketplace will charge the tax based upon the default delivery location associated with the applicable shipping class for the product.

Important! If your store is using campus-maintained tax rates, you should check with the Marketplace administrator to ensure that a tax rate for the default delivery location of your store is included in the *taxrates.dat* file.

Note: If a product does not require shipping and you want the tax for this product to be based on the customer's shipping address—instead of the default delivery location—then we recommend that you use the Require Shipping Address checkbox. When this checkbox is selected, the customer will always be required to enter a shipping address when they choose the corresponding delivery method; and therefore the tax will be calculated based on the shipping address.

As with any tax situation, you should contact your tax consultant to determine the applicable taxes.

Changing Delivery Methods

In each shipping class, you have enabled the 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.

<input checked="" type="checkbox"/> Select All	Country
<input checked="" type="checkbox"/>	Afghanistan
<input checked="" type="checkbox"/>	Aland Islands
<input checked="" type="checkbox"/>	Albania
<input checked="" type="checkbox"/>	Algeria
<input checked="" type="checkbox"/>	American Samoa
<input checked="" type="checkbox"/>	Andorra
<input checked="" type="checkbox"/>	Angola
<input checked="" type="checkbox"/>	Anguilla
<input checked="" type="checkbox"/>	Antarctica
<input checked="" type="checkbox"/>	Antigua and Barbuda
<input checked="" type="checkbox"/>	Argentina

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.

4.10 Store Product 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 left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Categories. The Category Settings page appears.

Id	Name	Products	Actions
19	Drawing Equipment	5	Edit Add Sub-Category
22	Paper	3	Edit Add Sub-Category
20	Pencils	4	Edit Add Sub-Category
21	Pens	4	Edit Add Sub-Category

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

Enter the category name and choose a layout for the category page:

- **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 page appears:

Architectural Supplies Category Listing Order

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

[Back To Categories](#)

Category List

Top-Level Category	
Sub-Category Name	Sort Key
Drawing Equipment	<input style="width: 100%;" type="text"/>
Paper	<input style="width: 100%;" type="text"/>
Pencils	<input style="width: 100%;" type="text"/>
Pens	<input style="width: 100%;" type="text"/>

[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 page appears:

Architectural Supplies 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 Information

Category Name:	<input type="text" value="Paper"/>
----------------	------------------------------------

[Rename](#)

Layout

Product Layout:	<input type="text" value="Thumbnails"/> <input type="button" value="View layout samples"/>
-----------------	--

[Update Layout](#)

Side Banner

No Images

Best results is using an image with the recommended W x H: 150 x 300 pixels

[Upload Side Banner](#)

Thumbnail Image



Best results is using an image with the recommended W x H: 80 x 80 pixels

[Upload Thumbnail Image](#)
[Remove 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 5.4 , "Managing Products in a Store" on page 276).

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 category side banner, the store's side banner will appear instead.

The category side banner appears at the left side of the page. The thumbnail image appears beside the category name in lists of subcategories.

Image Specifications

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

Important! It is your responsibility to ensure that you have all necessary rights for the images you upload. Images that you did not create (such as images on other web sites) are typically protected by copyright law and should not be uploaded for use in Marketplace unless you have received permission from the copyright holder.

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: Do not include bracket characters in the URL.

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, follow these steps:

- 1 Go to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Categories. The Categories page appears.
- 2 Locate the category that you would like to edit and click the Edit link for that category in the Actions column. The Edit Store Category page appears.
- 3 Look for the Product Sort Order section near the bottom of the page.



The Product Sort Order section allows you to change the product listing order.

- 4 Click and drag the products to rearrange the listing order.
- 5 Click the Save button.

4.11 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 left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Allowed Groups. The Store Group Settings page appears.

Architectural Supplies Allowed Groups

A "group" is a particular category of shoppers. Groups are defined by the Marketplace administrator. You can allow only certain groups to make purchases from your store.

Groups Allowed

<input checked="" type="checkbox"/> Everybody
<input checked="" type="checkbox"/> Registered Users
<input checked="" type="checkbox"/> Students
<input type="checkbox"/> Alumni
<input type="checkbox"/> Staff

Non Member Settings

Non-Members allowed to view products in the Store

Message displayed to Non-Members when trying to access the store or trying to purchase one of the products. (2,000 chars max)
(HTML Allowed)

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.

4.12 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 left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Groups Payment Methods. The Payment Method Settings page appears.

Architectural Supplies Group Payment Methods

Select the payment methods that each group can use.

Payment Methods

Group	Payment Methods Allowed
Registered Users	<input checked="" type="checkbox"/> AmEx <input checked="" type="checkbox"/> Discover <input type="checkbox"/> INTERAC <input checked="" type="checkbox"/> MasterCard <input checked="" type="checkbox"/> Visa <input checked="" type="checkbox"/> webCheck
Students	<input checked="" type="checkbox"/> AmEx <input checked="" type="checkbox"/> Discover <input checked="" type="checkbox"/> INTERAC <input checked="" type="checkbox"/> MasterCard <input checked="" type="checkbox"/> Visa <input checked="" type="checkbox"/> webCheck
Everybody	<input checked="" type="checkbox"/> AmEx <input type="checkbox"/> Discover <input type="checkbox"/> INTERAC <input checked="" type="checkbox"/> MasterCard <input checked="" type="checkbox"/> Visa <input checked="" type="checkbox"/> webCheck

- 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.

Note: When you disable a user group (by unchecking a user group on a store's Allowed Groups page), the selected payment methods are stripped away for that user group. If you subsequently reenable the same user group, you will need to reselect the allowed payment methods.

4.13 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 Promotion 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 left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Promotions. The Promotions page appears.

Architectural Supplies Promotions

Promotions require the buyer to enter a promotional code. When a promotion expires, archive it to reuse its promotional code.

Add Promotion

Store Promotion Product Promotion Category Promotion

Current Promotions

No Current Promotions

Future Promotions

Code	Name	Start Date	End Date	Actions
CMP2013	Spring Computer Sale	3/25/13	3/29/13	Archive
WNT2013	Winter Sale	1/21/13	2/1/13	Archive

Expired Promotions

No Expired Promotions

Archived Promotions

No Archived Promotions

- 2 Click the link for the type of promotion to add.
If you chose a Store-Wide Promotion, the following page appears.

Add Store Promotion

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

[Back To Promotions](#)

Promotion Information

If a promotion code is not provided, a system generated numeric promotion code will be assigned

Promotion Code:	<input type="text"/>
Name of Promotion:	<input type="text"/>
Promotion Description:	<input style="width: 100%; height: 40px;" type="text"/>

Promotion Discount

Promotion Type:	Percentage Off Per Item <input type="button" value="v"/>
-----------------	--

All amounts are in USD (\$)

For percentage off promotions enter the percentage as a whole number. 10 for 10%. For amount promotions enter the amount. 5 for \$5.00

Value Off:	<input type="text"/>
------------	----------------------

Promotion Usage

From: <input type="text"/>	To: <input type="text"/>
----------------------------	--------------------------

Allow Unlimited Usage

Promotion Email

Email Addresses receiving Promotion:	<input style="width: 100%; height: 40px;" type="text"/>
--------------------------------------	---

Delimiter used to separate Email Addresses:	<input type="text"/>
---	----------------------

Send Email to specified Email 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
<input type="checkbox"/> Adjustable Triangle
<input type="checkbox"/> Computer
<input type="checkbox"/> Dusting Brush
<input type="checkbox"/> French Curve
<input type="checkbox"/> Lead Holder
<input type="checkbox"/> Lettering Guide
<input type="checkbox"/> Mechanical Pencil
<input type="checkbox"/> Pentel 1000
<input type="checkbox"/> Pilot Fineliner
<input type="checkbox"/> Sketch Paper Roll
<input type="checkbox"/> T Square
<input type="checkbox"/> Technical Pen
<input type="checkbox"/> Vellum Roll
<input type="checkbox"/> Waterproof Marker
<input type="checkbox"/> White Foam Board
<input type="checkbox"/> Wooden Drafting Pencil

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

Categories to Include
<input type="checkbox"/> Drawing Equipment
<input type="checkbox"/> Paper
<input type="checkbox"/> Pencils
<input type="checkbox"/> Pens

- 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 page appears.

Architectural Supplies Send Promotion Email

Include your promotional code and store name in the email. The buyer will need the code at checkout.

Promotion added.

[Back To Promotions Management](#)

Current Promotion

Promotion Code:	PNP2012
Promotion Name:	Pencils and Pens Sale

Promotion Email

To send promotion notifications, enter email address. For multiple email addresses use a comma as a separator.

Email Addresses:	<input type="text" value="example@touchnet.com"/>
Subject:	<input type="text"/>
Message:	<div style="border: 1px solid #ccc; height: 100px;"></div>

Test Email

Preview the promotion email before sending it to your email list. Test email will include "Test Promotion Email -" in the subject line. For multiple address use a comma as a separator.

Test Email Address:	<input type="text"/>
---------------------	----------------------

[Send Test Email](#)
[Send Promotion Email](#)

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 left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Promotions. The Promotions page appears.

- Click the promotion code link for the promotion you want to change. The Promotion Details page appears.

Alumni Donations Promotion Details

Change promotion details and review promotion use statistics.

[Back To Promotions](#)

Promotion Details

Promotion Applies To:	All Products in Store
Promotional Code:	aasdf
Name:	<input type="text" value="Big Sale!"/>
Description:	<div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;">For a limited time only, get 0.1% off!</div>
Promotion Discount	
Discount:	0.1% Off Each Item
Promotion Usage	
From: <input type="text" value="3/12/13"/>	To: <input type="text" value="3/25/13"/>
Unlimited Usage:	true

[Update Promotion](#)

Promotion Email

<input type="text" value="All Users"/>	Edit Promotion Email
--	--------------------------------------

Promotion Totals

Number of People Redeeming	Number of Orders	Quantity Ordered	Items Original Ordered Amount	Items Sales Ordered Amount	Discount Amount
0	0	0	\$0.00	\$0.00	\$0.00

Redemption Rate

Number of People Redeeming	Number of Promotions Sent	Ratio
0	1	0.00%

- 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.

- From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Promotions. The Promotions page 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 left navigation menu, go to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Promotions. The Promotions page appears.
- 2 Click the promotion code link to see its statistics in the Promotion Details screen.

4.14 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.

Important! Marketplace does not encrypt user modifier data in storage or mask this data in reports. Therefore, sensitive material should not be collected using the user modifier fields. For example, collecting Social Security Numbers with a user modifier field would increase the risk of the misuse of this information (i.e., identity theft).

The following three 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.
- **Text Entry**—The shopper is asked to enter a text response to a prompt. This response can be either required or optional. For example, the shopper might be asked an optional demographics question, such as their current occupation. Or the shopper might be required to enter a text response to a prompt. For example, the shopper might be required to enter their year of graduation.

- **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).

In addition, Marketplace provides a way for managing multiple modifiers:

- **Table Builder**—The Table Builder organizes modifiers in a table format, making it more convenient for customers to enter information for multiple modifiers during the uStores checkout process. Each column of the table represents a user modifier that is set up and controlled independently from the table.

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 left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > User Modifiers. The Add Store User Modifiers page appears. Any existing user modifiers are listed at the bottom of this page.

Architectural Supplies User Modifiers

Modifiers can be configured for information collection about the buyer.

Add Modifier

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

Add Modifier Group

Type	Example
Table Builder	Example

Current Modifiers

Name	Sort Key	Type	Format What is this?	Actions
No modifiers are currently configured for this store				

- 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 user 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.

The screenshot shows a web form titled "Architectural Supplies Add User Modifier". At the top, there is a purple header bar with the title. Below the header, a yellow banner contains the text: "Required Selection Modifier requires the buyer to choose a selection from the list." A purple button labeled "Back To User Modifiers" is located below the banner. The main form area has a green header for "Required Selection Modifier". It includes a "Name:" label followed by a text input field. Below this, a grey banner states "The buyer will select from the following entries." Underneath, there is a section labeled "Selection" containing ten numbered rows, each with a text input field. At the bottom of the form, there are two purple buttons: "Add More Selections" and "Add Modifier".

- Text Entry Modifier**—You must enter a name for the modifier and select whether the modifier should be a required or optional field. The "Format Validation" field allows you to specify the format of the entry (numeric, alphabetic, e-mail, date, phone number, etc.) so that validation can take place on the customer's entry and undesired characters can be eliminated. For example, by choosing, "numeric" you can eliminate alphabetic characters from being entered. Or by choosing "US/Canada Phone Number" you can ensure that the customer's entry has the format of a 10-digit phone number. Select a validation format from the dropdown list. Enter the minimum number and maximum

number of characters that must be entered in this field. (The maximum allowed by Marketplace is 100.)

Architectural Supplies Add User Modifier

Text Entry Modifier are shown to the buyer at purchase completion.

Text Entry Modifier

Name:	<input type="text"/>
Type:	<input type="radio"/> Required <input type="radio"/> Optional
Format Validation: What is this?	Free Text <input type="button" value="v"/>
Minimum Characters	<input type="text"/>
Maximum Characters (100 is Maximum Allowed):	<input type="text"/>
Hide Modifier In Confirmation Emails:	<input type="checkbox"/> Yes (Recommended with collecting of sensitive data)

- 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.

Architectural Supplies 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.

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.

Validation Formats for Text Entries

The following table defines the validation formats that are available for text entries.

Validation Format	Definition/Characters Allowed
Numeric	0123456789
Numeric Extended	0123456789-()., [space]
Alpha	abcdefghijklmnopqrstuvwxyz ABCDEFGHIJKLMNOPQRSTUVWXYZ
Alpha Extended	abcdefghijklmnopqrstuvwxyz ABCDEFGHIJKLMNOPQRSTUVWXYZ -().,& [space] ' [single quote]
Alphanumeric	abcdefghijklmnopqrstuvwxyz ABCDEFGHIJKLMNOPQRSTUVWXYZ 0123456789

Validation Format	Definition/Characters Allowed
Alphanumeric Extended	abcdefghijklmnopqrstuvwxyz ABCDEFGHIJKLMNOPQRSTUVWXYZ 0123456789-().,& [space] ' [single quote]
Free Text	All characters.
Email	The customer must make an entry that contains an @ character and a . (period) character. If the Require Confirmation checkbox is also selected, the customer will see a confirm e-mail field and must enter their e-mail a second time. The entries must be identical.
Date mm/dd/yyyy	Must include 10 total characters, including forward slash characters. Month (mm) must be 00 to 12. Day must be 00 to 31. Year must include four digits.
Date dd/mm/yyyy	Must include 10 total characters, including forward slash characters. Day must be 00 to 31. Month (mm) must be 00 to 12. Year must include four digits.
Date yyyy/mm/dd	Must include 10 total characters, including forward slash characters. Year must include four digits. Month (mm) must be 00 to 12. Day must be 00 to 31.
US/Canada Phone number	(999) 999-9999 Length of 14, formatted with () -
Contains Alpha Characters	The entry must include one alphabetic character as specified above for Alpha validation.
File Name	All characters.

Using the Table Builder

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

- 1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > User Modifiers. The User Modifiers page appears. Any existing user modifiers, including Table Builders, are listed in the Current Modifiers section. The Type column will say "Table Builder" for existing table builders, and the modifiers that are part of the table builder will be grouped into a sub-table.

- 2 Select the Table Builder text link in the Add Modifier Group section. The Table Builder page appears.

What is this?, and Action."/>

Free Seminar: Table Builder

Table Builder presents modifiers in a table format where each column displays a different modifier.

[Manage Modifiers](#)

Table Builder

Table Name:

Modifier: Select a Modifier

Table Information

Name	Sort Key	Type	Format What is this?	Action
------	----------	------	--------------------------------------	--------

The Table Builder page allows you to associate existing modifiers with a table.

- 3 Enter a Table Name.
- 4 From the Modifier drop down list, select a modifier to include in the table and click the Add Modifier to Table button.

All modifiers that you have created are included in the Modifier dropdown list. The Table Builder allows you to organize *existing* modifiers into a tabular format. So be sure you have already created *all* the modifiers that you would like to appear in the table *before* you create the table.

- 5 Repeat Step 4 for all additional modifiers that you would like to include in the table.
- 6 Specify a sort order for the display of the modifier columns (left to right) in the table by entering a Sort Key number for each modifier.
- 7 Click the Save button.

Customers will see the table appear during the checkout process.

The screenshot shows a web form titled "Architectural Supplies Buyer Information" within a "YourCampus" interface. The form contains several input fields and a table of options. The fields are: "Year of Graduation" (a dropdown menu with "Please Select" selected), "What's your pet's name?" (a text input field), "Graduate degrees?" (a table with three rows and checkboxes), and "Shoe size" (a dropdown menu with "Please Select" selected). A green "Review Order" button is located below the shoe size field, and a green "Apply" button is at the bottom right of the form area.

Customer Questions		
Year of Graduation	What's your pet's name?	Graduate degrees?
Please Select		<input type="checkbox"/> Bachelor of Arts <input type="checkbox"/> Bachelor of Science <input type="checkbox"/> Master's degree
Shoe size		
Please Select		

Here is an example of a table that includes three modifiers.

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 left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > User Modifiers. The Add Store User Modifiers page 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 left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > User Modifiers. The Add Store User Modifiers page 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.

4.15 Taxes

Marketplace 6.5 introduces the option of using a tax service that provides up-to-date tax rate tables for all municipalities in the United States, including territories and the armed forces. This information is updated on a monthly basis.

Store managers decide on a store-by-store basis whether to use the tax service by using the Store Tax Service page. When the Yes button for Use Tax Service is selected, the store will use the tax service for all tax calculations. When the No button for Use Tax Service is selected (which is the default selection for all stores), the store will use a tax method in which a Marketplace administrator is responsible maintaining the tax rate files for all states, counties, and cities where taxes should be withheld. This latter tax method is the only tax method that was available in Marketplace 6.0 and earlier.

To use the Marketplace tax service:

- 1 In the left navigation menu, go to Marketplace Home > [merchant] > Stores > [store] > Tax Service. The uStores Tax Service page opens.

Architectural Supplies Tax Service
Settings for the usage and locations of the tax service.

Tax Service Settings

Tax Service calculates tax rate based on the delivery address (zip+4) for the selected states, territories, and armed forces. When not using Tax Service, the Tax Rates files (city_country.dat, taxrates.dat) provides the tax rate for the City, County and State.

Use Tax Service: Yes No

Save

- 2 Select the Yes radio button.

Important! In order for a store manager to turn on the tax service, all shipping classes for a store must use ZIP + 4 in the default delivery locations.

- 3 Click the Save button.

About the Tax Methods

Marketplace offers two methods for computing taxes, and one of these methods is being introduced in Marketplace 6.5. Each store is given the ability to choose which tax option best meets their needs. The following table describes the two tax methods and the pros and cons of these methods.

Tax Method	Pros	Cons
<p><i>Campus-maintained Tax Rates:</i> The campus maintains the files that specify the tax rates. (This is the only tax method available in Marketplace 6.0 and earlier.)</p>	<ul style="list-style-type: none"> • The campus can take control as necessary over the applicable tax rates (for example, for a one-day zero-tax holiday). • Allows for three tax rates: No tax, default tax, and higher tax. 	<ul style="list-style-type: none"> • A Marketplace administrator is responsible for maintaining tax rates for all cities, counties, and states where tax will be charged. • Tax rates can be applied at city, county, and state level, but not at the ZIP code level.
<p><i>Marketplace Tax Service:</i> Marketplace utilizes a tax service that maintains the tax rate files. (This tax method is new in Marketplace 6.5.)</p>	<ul style="list-style-type: none"> • The tax service maintains the tax rates for all USA states and territories. • Tax rates are updated monthly. • Tax rates are applied at a ZIP+4 level, thus providing greater accuracy. 	<ul style="list-style-type: none"> • Only two tax rates are available: No tax and default tax (i.e., a higher tax rate is not available).

About Tax Classes and 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.

Note: The higher tax rate is not available when Marketplace provides the tax rates.

Store managers or store clerks decide which tax rate to charge for each product.

About Taxes and Shipping Addresses

If a product (or its shipping) is configured for tax, the applicable rate is based upon the shipping address entered by the customer during the uStores checkout process. If the customer was not required to enter a shipping address with the delivery method, then Marketplace will charge the tax based upon the default delivery location associated with the applicable shipping class for the product. This tax rate will be used for all products that do not require shipping, such as digital products.

As with any tax situation, you should contact your tax consultant to determine the applicable taxes.

4.16 Assigning Tax Account Codes

Marketplace administrators and merchant managers can set up tax account codes; however, store managers can override the administrative or merchant tax account accounts by setting up store level tax account codes.

A merchant will first need to set up the general ledger accounting codes that can be used by the store, as described in "[Merchant Accounting Codes](#)" on page 147. Once these accounting codes are established you can then assign these accounting codes to tax classes.

To assign a tax account code:

- 1 In the left navigation menu, go to Marketplace Home > [merchant] > Stores > [store] > Tax Account Codes. The Tax Account Codes page opens.

Tax Class Name	Accounting Code
no tax	<input type="text"/>
default tax rate	<input type="text"/>
higher tax rate	<input type="text"/>

Save Reset

- 2 For each tax class, select an accounting code from the Accounting Code dropdown list.
- 3 Click the Save button.

Note: If your store is using the Marketplace tax service, the "higher tax rate" is never used. The tax service only uses the "no tax" and "default tax rate" tax classes. If your store needs to use a higher tax rate, you should consider using the campus maintained tax rate files; however, you must communicate with your campus Marketplace administrator to ensure that the tax rate files have been configured for the higher tax rate.

For Banner, Ellucian, and PeopleSoft Customers

For more information about assigning an accounting code to a tax class, choose your general ledger system: [Banner](#), [Colleague](#), or [PeopleSoft](#).

4.17 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 161.

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 23. 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=23&SINGLESTORE=true
```

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

5.0 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 Product Wizard in the Operations Center (See "[Adding a Single Product Using the Wizard](#)" on page 245).
- Or, you can build a product import file to add multiple products at the same time (See "[Importing Product Lists](#)" on page 261).

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 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 to shoppers.
- **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.

5.1 Adding a Single Product Using the Wizard

The Add a New Product Wizard makes adding products simple. Just follow the prompts and continue page by page through the process. Before you get started, however, make sure you understand the concept of using product "options" (such as size or color). Depending on your product, you may need to add product "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 "item for sale."

For instance, you might offer a shirt in three colors. Instead of adding three products, you enter the shirt as one product with three options.

As you go through the Add 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 a different inventory item, use a product "modifier" instead. See **"Products With Modifiers" on page 261** for more details.

Adding a Product

Follow these steps to add a single product. Merchant managers, store managers, and store clerks can add products.

Important! Before you begin adding products to a new store, you must configure one or more shipping classes, as described in **"Shipping Classes" on page 212**.

- 1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products. The Store Products page appears.

Architectural Supplies Products Print Page

Click on links to access product settings, items for sale, and modifiers.

Add Product Import Product Related Items

Products

Show 25 entries Search:

<input type="checkbox"/>	Name	Type	Items for Sale	Quantity	Store Category	Web	Mobile	
<input type="checkbox"/>	additional item	Donation	1	Not Tracked	(Store Home Page)	Enabled	Enabled	
<input type="checkbox"/>	Adjustable Triangle	Generic	1	Not Tracked	Drawing Equipment	Enabled	Enabled	
<input type="checkbox"/>	Computer	Generic	2	Varies by Item for Sale	Drawing Equipment	Enabled	Enabled	
<input type="checkbox"/>	Dusting Brush	Generic	1	Not Tracked	Drawing Equipment	Enabled	Enabled	
<input type="checkbox"/>	French Curve	Generic	1	Not Tracked	Drawing Equipment	Enabled	Enabled	
<input type="checkbox"/>	Lead Holder	Generic	3	Varies by Item for Sale	Pencils	Enabled	Enabled	
<input type="checkbox"/>	Lettering Guide	Generic	1	Not Tracked	Pens	Enabled	Enabled	
<input type="checkbox"/>	Library Fund	Donation	2	Varies by Item for Sale	(Store Home Page)	Enabled	Enabled	
<input type="checkbox"/>	Mechanical Pencil	Generic	2	Varies by	Pencils	Enabled	Enabled	

- 2 Click the Add Product button. The first page of the Add Product process appears.

Add Product: Product Settings

Add Product

Product creation settings. Payment methods are configured for the host system account in Payment Gateway.

[Back To Products](#)
Print Page

Product Settings

Product Name: (200 chars max)	<input type="text"/>
Short Description: (500 chars max) (HTML Allowed)	<div style="border: 1px solid #ccc; height: 40px;"></div>
Mobile Description:(500 chars max) (HTML Allowed)	<div style="border: 1px solid #ccc; height: 40px;"></div>
Long Description: (30,000 chars max) (HTML Allowed)	<div style="border: 1px solid #ccc; height: 80px;"></div>
Product Type	<input checked="" type="radio"/> Generic <input type="radio"/> Digital <input type="radio"/> Donation
Should this be offered as an additional item at checkout?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Should this be offered only as an additional item at checkout? (Only if yes to question above)	<input type="radio"/> Yes <input checked="" type="radio"/> No
All prices are in USD (\$)	
Price:	<input type="text"/>
Donation amount:	<input type="checkbox"/> User entered amount. <input checked="" type="checkbox"/> 1 <input type="text"/>
Add More Selections	
Allowed Payment Methods:	<input type="checkbox"/> AmEx <input type="checkbox"/> Discover <input type="checkbox"/> INTERAC <input type="checkbox"/> MasterCard <input type="checkbox"/> Visa <input type="checkbox"/> webCheck
Days fulfiller must wait before fulfilling orders paid via ACH:	<input type="text"/>

[Continue](#)
[Cancel](#)

- 1 Complete the following product description 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.

In addition, for products that use the "Should this be offered as an additional item at checkout?" option, the short description will appear for shoppers on the "Additional Items" page, which is the first page of the checkout process when Additional items are configured. Be sure to enter appropriate text in this field so that shoppers can make a good decision about whether to add the "additional item" to their shopping cart.

- **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 the Short Description field and the Long Description field. HTML entered in these fields must be properly formatted. It will undergo a validation process and any improperly formatted HTML will not be accepted. We recommend you become proficient in authoring HTML before you attempt to add HTML to these fields. For more information about using HTML or CSS, please see the *Marketplace uStores Layout Guide*.

Important! In order to ensure that Marketplace remains a secure environment for processing commerce transactions, fields that accept HTML in the Operation Center will not accept HTML form tags, iframe tags, object tags, and some additional code—including JavaScript.

2 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 259 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 259 for more information.
- 3 Use the following two fields to indicate whether the product will be offered to shoppers as an additional item during the checkout process:
- **Should this be offered as an additional item at checkout?**—If you choose Yes for this option, any shopper who places a product from this store in their shopping cart and then initiates the checkout process will see an additional page at the beginning of the checkout process. This page will provide the shopper with the option of adding the product that you are now creating to their cart. By offering your shoppers additional items during checkout, you can help increase revenue by bringing special items to the attention of your customers.
 - **Should this be offered only as an additional item at checkout?**—(Only available if you chose Yes for the previous option.) If you choose Yes for this option, then this product will ONLY be available as an additional item during the checkout process. In other words, shoppers will not see the product on store pages or product category pages: the product will only be available once the checkout process has been initiated and the shopper has at least one item from this store in their cart.
- 4 Enter a price for Generic and Digital products.
- This amount 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.
- 5 Complete the "Donation amount" fields for Donation products.
- **User entered amount**—Select this checkbox to display a field to the donor in which they can enter a specific donation amount.

- **1**—Select this checkbox to provide donors with a set donation amount that they can choose by selecting a radio button. Enter the donation amount in the field to the right of the checkbox. Add more pre-set donation amounts by selecting the Add More Selections button. The first time you select the Add More Selections button a **2** line appears. The second time, a **3** line appears, etc.
- 6** Choose the allowed payment methods for this product. For more information about payment methods, see "**Notes on Payment Methods**" on page 209.

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.

- 7** 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.

- 8** Click the Continue button. The Miscellaneous Settings page appears.

Add Product: Miscellaneous Settings

Alumni Seminar : Add Product

Set miscellaneous settings for the product. Settings can be edited after product creation.

Back To Products
Print Page

Miscellaneous Settings

Shipping Class:	regular ▼
Tax Class:	default tax rate ▼
Accounting code is used for store GL submissions. Accounting code can be changed to override the store Accounting Code.	
Accounting Code:	General Alumni
Override Accounting Code:	General Alumni ▼
Special Authorization Question and Answer limit customers with product purchasing power.	
Special Authorization is required to purchase product:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Special Authorization Question:	<input style="width: 100%;" type="text"/>
Special Authorization Answer:	<input style="width: 100%;" type="text"/>
Shipping/Handling message:	<input style="width: 100%;" type="text"/>

Continue
Cancel

- 1** Complete the following fields.

- **Prompt for Donation amount**—(Donations only) You can customize the prompt that asks the customer for the donation amount.
- **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 259 for more information about setting up a shipping class appropriate for donations. For more information about shipping classes, see "**Shipping Classes**" on page 212.
- **Tax Class**—Choose a tax class appropriate for the product. If a product is configured for tax, the applicable rate is based upon the shipping address entered by the customer during the uStores checkout process. 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.

Note: The higher tax rate is not available when the Marketplace tax service is used.

If the customer was not required to enter a shipping address with the delivery method, then Marketplace will charge the tax based upon the default delivery location associated with the applicable shipping class for the product. In order for you to ensure that the appropriate tax rate is charged on a product in which no shipping is required—such as a digital product—we recommend that you use the Require Shipping Address checkbox. When this checkbox is selected, the customer will always be required to enter a shipping address and therefore the tax will be calculated based on this location. (As with any tax situation, you should contact your tax consultant to determine the applicable taxes.)

For more about tax classes, see "**Tax Account Codes**" on page 120.

Override Accounting Code

This field appears if general ledger reporting has been turned on for the store. For more information about assigning an override accounting code to a product, choose your general ledger system: [Banner](#), [Colleague](#), or [PeopleSoft](#).

- **Special Authorization is required to purchase product**—If the purchase of this product requires the customer to provide additional information that can be used to authorize the purchase (such as a password), choose the Yes radio button. Also, enter text in the "Special Authorization Question" field. This prompt will appear on the product page. In addition you must make an entry in the "Special Authorization Answer" field. The customer's entry

will be validated against this value. If you make no entry in the "Special Authorization Answer" field, then ANY customer entry will be accepted in the "Special Authorization Answer" field.

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 , "User Groups and User Authentication" on page 142.

- **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.

2 Click the Continue button. The Upload Images page appears.

Add Product: Images

Alumni Seminar : Add Product

Set images for the product. Images can be edited and removed after product creation. Use graphics in JPG, GIF, or PNG formats. Maximum file size is 250K.

[Back To Products](#) Print Page

Upload images for Stores

Best results is using an image with the recommended W x H: 250 x 250 pixels

No Images

[Upload full size image](#)

Best results is using an image with the recommended W x H: 80 x 80 pixels

No Images

[Upload thumbnail image](#)

[Continue](#) [Cancel](#)

- 1 Click the "Upload full size image" button (or the "Upload thumbnail image" button) 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.

Important! It is your responsibility to ensure that you have all necessary rights for the images you upload. Images that you did not create (such as images on other web sites) are typically protected by copyright law and should not be uploaded for use in Marketplace unless you have received permission from the copyright holder.

- 2 Click the Continue button. The Options page appears.

Add Product: Options

An "option" is a factor such as size or color that the shopper must choose before adding the product to their shopping cart. For instance, you might offer a shirt in three colors and four sizes (e.g., white, blue, and gray; and small, medium, large, and extra large). In Marketplace, you can create this shirt as one product with options for size and color. Each combination of options (blue and small, blue and medium, blue and large, etc.) results in a separately tracked inventory item with its own stock number.

As you go through the Add Product process, you will have an opportunity to set up options for your product, if necessary.

- 1 If the product should have no options that the shopper must select before putting the product in their shopping cart, click the No radio button and then the Continue button. The Item for Sale Settings page appears. (Go to the "Add Product: Item for Sale Settings" section.)

If the product should have options such as size or color, click the Yes radio button and then the Continue button. The Add Product process now follows an alternate branch that allows you to specify the product options. These options typically require separate inventory items: For example, a sweatshirt might be available in black or white, so the stock inventory would consist of black sweatshirts and white sweatshirts..

First, you're asked to specify the types of options to use.

Alumni Seminar : Add Product

Add options to be associated with a product. Option type name must be provided.

[Back To Products](#) [Print Page](#)

Options

Select from the default options or enter a new option.

Size

Color

[Continue](#) [More Options](#) [Cancel](#)

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 option types (such as height, weight, volume, sleeve length, etc.) by using the additional field(s). After you've selected the option types (or entered new types), click the Continue button.

Alumni Seminar : Add Product

Set values to be associated with each option. Options and values can be added, edited and deleted after product creation.

[Back To Products](#) [Print Page](#)

Option Values

At least one value must be entered for the option: Size

[More Values](#)

Option Values

At least one value must be entered for the option: Color

[More Values](#)

[Continue](#) [Cancel](#)

Now, you're asked to specify the allowed values for a product option. You're initially given one field in which to name the first option value. If you need to enter another option value, select the More Values link. Enter the next value. Repeat this process until you have entered all the required option values.

- 2 Click the Continue button when you are finished. The Item for Sale Settings page appears.

Add Product: Item for Sale Settings

Alumni Seminar : Add Product

Set the stock number, price and item for sale settings.

[Back To Products](#)
Print Page

Item for Sale Settings

Item for Sale	Id
Alumni Seminar	Set with confirmation
Price is in USD (\$)	
Price:	<input type="text" value="100.00"/>
Stock Number (Maximum characters 30):	<input type="text"/>
Assign Random Stock #	
<input checked="" type="checkbox"/> Check to see if stock number is already used	
Limit Quantity:	<input type="radio"/> Yes, Maximum Per Order: <input type="text"/> <input checked="" type="radio"/> No
Track Inventory:	<input type="radio"/> Yes, Initial Inventory: <input type="text"/> <input checked="" type="radio"/> No
Out of Stock Message (This message will appear if the item goes out of stock): (500 chars max) (HTML Allowed)	<div style="border: 1px solid #ccc; height: 40px;"></div>
Back Orderable:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Auto Fulfill:	<input type="radio"/> Yes <input checked="" type="radio"/> No

[Continue](#)
[Cancel](#)

On the "Item for Sale Settings" page of the Add Product process, several fields appear regarding price, inventory, and other product info.

If you did not set up product options, as described in the "Add Product: Options" section, you only have to fill out this page once. However, if you established product options, you will need to complete this page multiple times for each set of options (or for the combinations of options). For example, if you set up an option for "Size" and you entered the values of small, medium, and large. You would complete the Additional Product Info page three times.

By completing this page separately for each product option (or combination of options), you can set up different prices and inventory for each option (or combination of options). The "Item for Sale" row indicates how many separate items are available as a result of the option value combinations. A separate row names the option value combination. For example, if you created a product with options for Size and Color, and you assigned black and white as the values for Size and small and large as the values for Color, you will have four items for sale: "black : small"; "black: large"; "white : small"; and "white : large". And therefore you will complete this page four times.

- 1 Complete the following fields:

- **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 this page overrides the price that you entered on the first page of the Add Product process.
- **Stock Number**—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. Click the Assign Random Number button to have Marketplace automatically assign a stock number. 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 assigned" checkbox.
- **Limit Quantity**—(Generic and Donation only) Select 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) Select Yes to track the product's inventory. If yes, enter the initial inventory quantity.
- **Out of Stock Message**—If you selected Yes for the **Track inventory** field, you can enter a message that will be displayed to shoppers (on the uStores Product Details page) when the inventory of that products reaches zero. If no entry is made in this field, a generic "out-of-stock" message will be displayed when the shopper attempts to add the product to their shopping cart.
- **Back orderable**—(Generic and Donation only) Choose Yes if a shopper can order the product even when the inventory 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.

- **Item for Sale is not available**—If an option combination (an "Item for Sale") is not valid for your store, or if a combination is not currently available, you can use this checkbox to disable the "Item for Sale." For example, a small *blue* sweatshirt IS available but a small *white* sweatshirt is NOT. If at a later day you need to enable the "Item for Sale", you can do so by navigating to the Product Option page.
- 2 Click the Continue button when you are finished. The enable/disable options appears.

Add Product: Status

Alumni Seminar: Add Product

Upon confirmation, product will be added to available products. Products are enabled by default. Enabled products are viewable in stores.

Back To Products
Print Page

Store Status

Enabled

Disabled

Schedule Status

24-hour (example: 00 for Midnight)	Enable Date:	<input type="text"/>		Enable Hour:	<input type="text"/>	<input type="text"/>
Store Time Zone: Central Standard Time	Disable Date:	<input type="text"/>		Disable Hour:	<input type="text"/>	<input type="text"/>

Mobile Status

Enabled

Disabled

Schedule Status

24-hour (example: 00 for Midnight)	Enable Date:	<input type="text"/>		Enable Hour:	<input type="text"/>	<input type="text"/>
Store Time Zone: Central Standard Time	Disable Date:	<input type="text"/>		Disable Hour:	<input type="text"/>	<input type="text"/>

Confirm
Cancel

- 1 Choose from the enable options:
 - **Enabled**—If you choose this option, the product will be immediately available to buyers once you click the Confirm button.
 - **Disabled**—If you choose this option the product will not be available to shoppers until you enable it. You can use this option if you plan to add modifiers to a product, as described in "**Products With Modifiers**" on page 261 By taking this action, you can set modifiers for the product before it goes live in your store.

- **Schedule Status**—If you choose the Schedule Status button, you can use the date and hour fields to enable and/or disable a product on a specified date and hour. Both a date and hour must be selected. Hours are listed in military format. (For example, 15 is 3 p.m.) The enable and disable fields can be used together or separately. When an enable date and hour are selected, you do not need to enter a disable date and hour. Likewise, when you enter a disable date and hour, you do not need to enter an enable date and hour.

Note: The time zone for the enable and disable hour is established on the Store General Settings page, as described in "**General Settings**" on page 162.

- 2 Click the Confirm button. Your product has been successfully added to your store! The Category page next appears.

Add Product: Categories

T-Shirt with Logo: Add Product

Products may be organized by category. Selection of multiple categories is possible by selecting the category name while pressing the CTRL key.

Back To Products
Print Page

Mall Category Assignments

	0 items selected
<input type="text"/>	
Add all	Remove all
Detail Category Mall Product +	
Name and Price Category Image +	
Name and Price Category No Image +	
Seb's category +	

When you reach this page, the process of creating the product is done; however, now you have an opportunity to assign the product to one or more product categories. These categories can be Marketplace mall-level product categories and/or store-level product categories.

- 1 Assign your product to Marketplace mall categories (for more information, see "**Mall Product Categories**" on page 111) and store categories (for more information, see "**Store Product Categories**" on page 217). You can select multiple categories. Click the + [plus] sign in the left column for each category you would like to add. If you add any categories by accident, you can easily remove those categories by

clicking the - [minus] sign in the right column for each corresponding category.

- 2 Click the Continue button.

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 left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Shipping Classes. The Shipping Classes page 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 Classes screen is refreshed with the new shipping class added.

Shipping Class: no shipping

All charges are in USD (\$)

Delivery Method	Enable	Base Charge	Additional Item Charge	Shipping Address Required	Allowed Countries	Tax Class
None	<input checked="" type="checkbox"/>	0.00	0.00	<input type="checkbox"/>	N/A	no tax ▾
Walk-In	<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>	N/A	default tax rate ▾
USPS First-Class Mail	<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>	N/A	default tax rate ▾
USPS Priority Mail	<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>	N/A	default tax rate ▾
USPS Express Mail	<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>	N/A	default tax rate ▾

Default Delivery Location:

City:

State:

ZIP / Postal Code:

All U.S. States, Territories and Armed Forces must use ZIP+4 (format: XXXXX-XXXX).

Save no shipping 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 Shipping Address Required checkbox for the N/A delivery method.

Note: For more information regarding the establishment of shipping classes and delivery methods, see ["Shipping Classes" on page 212](#) and ["Delivery Methods" on page 117](#).

Donations and Recurring Payments

The Recurring Payment Setup page will appear as part of the Add Product Wizard if the following conditions have been met:

- 1 The Allow Recurring Payments on Donation Product Types option has been turned on in the store's general settings.
- 2 Donation was selected as the Product Type in Step 1 of the Add Product Wizard.
- 3 The Auto Fulfill option was set to Yes on the Additional Product Info page of the Add Product Wizard.

If these conditions are met, the Recurring Payment Setup page will appear as part of the Add Product Wizard immediately after the Additional Product Info page. (For more information about the Add Product Wizard, see ["Adding a Product" on page 246](#).)

Add A New Product Wizard : Recurring Payment Setup

If users should make one-time payments only, set the first option to No and do not set other options.

[Back To Product Management](#)

Allow Recurring Payments?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Recurring Payments are required?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Prompt Displayed to User Asking if Recurring Payments are Desired:	<input type="text"/>
Maximum Duration	<input type="text"/> --Select Units-- (6 years Max)
Accepted Frequencies:	<input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Bi-Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Semi-Annually <input type="checkbox"/> Annually

[Cancel](#) [Continue](#)

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 99 years. If you leave the number field empty, the maximum duration will be 99 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.

Products With Modifiers

For some products, modifiers are an essential component; however, modifiers are not part of the Add a Product Wizard. To add a modifier, you must first complete the process of adding a product with the Add a Product Wizard. Then you must edit the product.

A product "modifier" asks the customer for additional information about their order. For example, a modifier could be used to add a monogram to a shirt (the shirt is the product and the monogram is a modifier), or a modifier could be used to collect a lunch preference or a conference session selection when a shopper is registering for a conference (the conference registration is the product and the lunch preference and the session selection are modifiers). The modifier doesn't change the stock number of the product, but it might change the price.

For more information about how to add one or more modifiers to a product, see ["Using Product Modifiers" on page 330](#).

5.2 Importing Product Lists

You can import multiple products using a product import file.

Creating the Product Import File

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 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 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 Category column on the Products page 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 263**).

- 2 To the row, add any optional column headings you want to use (see "[Optional Column Headings](#)" on page 263).
- 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 using the Operations Center.

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 by editing the product in the Marketplace Operations Center.

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.

AUTH_PROMPT_ANS

Answer to prompt from the user if authorization is required. Must be filled in if authorization is required. A maximum of 50 characters.

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.

DEBIT_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 left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products. The Products page appears.
- 2 Choose the "Import Products" link. The Product File Upload page 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 page appears. Messages are displayed on this screen and these messages either

represent errors with the import file or confirm that products were imported.

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 left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products. The Products page appears.
- 2 Choose the "Import Product(s) from a File" link. The Product File Upload page 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 page 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.

5.3 Adding a Package

A package is a group of products offered as a set. The products that will be part of the package must have previously been added as individual products in Marketplace. The process of creating a package involves first selecting which products should be included in the package and then configuring the package settings. These settings include the allowed payment methods (which can be different than the payment methods used for the individual products), descriptions, images, product status (including the ability to schedule status changes), category assignments, and more.

The price of a package is simply a sum of the prices for each product in the package; however, in the package configuration settings, you can establish price overrides for each product in the package. When you use price overrides, you can thus provide discounts.

Only generic products and digital products can be included in packages. You cannot include donations in packages.

To add a package, follow these steps:

- 1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products. The Store Products page appears.

Products										
Show 25 entries		Search:								
<input type="checkbox"/>	Name	Type	Items for Sale	Quantity	St	Ca				
<input type="checkbox"/>	Alumni Brick	Generic	1	Not Tracked	Bri					
<input type="checkbox"/>	Black Windbreaker	Generic	4	Varies by Item for Sale	[St	Pa				
<input type="checkbox"/>	Dress Shirt	Generic	5	Varies by Item for Sale	Ap					
<input type="checkbox"/>	Grey Polo	Generic	4	Varies by Item for Sale	Ap					
<input type="checkbox"/>	Men's Watch	Generic	1	Not Tracked	Jew					
<input checked="" type="checkbox"/>	Mug with College Mug text	Generic	1	Not Tracked	Mu					
<input checked="" type="checkbox"/>	Mug with College Rocks text	Generic	1	Not Tracked	Mugs		Enabled	Enabled	Disabled	
<input checked="" type="checkbox"/>	Mug with Good Ideal text	Generic	1	Not Tracked	Mugs		Enabled	Enabled	Disabled	
<input checked="" type="checkbox"/>	Mug with heart	Generic	1	Not Tracked	Mugs		Enabled	Enabled	Disabled	

- 2 Select each product (by selecting the corresponding checkboxes in the far left column), and then choose Create Package from the Gear flyout in the column heading.

The first page of the Add Package process appears.

Important! Only generic products and digital products can be included in packages. You cannot include donations in packages.

Add Package: Package Settings

Add Package
Print Page

Package creation settings. Payment methods are configured for the host system account in Payment Gateway.

Back To Products

Package Settings

Package Name: (200 chars max)	<input type="text"/>
Short Description: (500 chars max) (HTML Allowed)	<div style="border: 1px solid #ccc; height: 30px;"></div>
Mobile Description: (500 chars max) (HTML Allowed)	<div style="border: 1px solid #ccc; height: 30px;"></div>
Point of Sale Description: (500 chars max) (No HTML Allowed)	<div style="border: 1px solid #ccc; height: 30px;"></div>
Long Description: (30,000 chars max) (HTML Allowed)	<div style="border: 1px solid #ccc; height: 60px;"></div>
Should this be offered as an additional item at checkout?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Should this be offered only as an additional item at checkout? (Only if yes to question above)	<input type="radio"/> Yes <input checked="" type="radio"/> No
Allowed Payment Methods:	<input type="checkbox"/> AmEx <input type="checkbox"/> Discover <input type="checkbox"/> INTERAC <input checked="" type="checkbox"/> MasterCard <input checked="" type="checkbox"/> Visa <input checked="" type="checkbox"/> webCheck
Days fulfiller must wait before fulfilling orders paid via ACH:	<input type="text"/>

Continue
Cancel

1 Complete the following package description fields:

- **Product Name**—Shoppers see the package 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 description in the detailed category 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 packages 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.

In addition, for packages that use the "Should this be offered as an additional item at checkout?" option, the short description will appear for shoppers on the "Additional Items" page, which is the first page of the checkout process when Additional items are configured. Be sure to enter appropriate text in this field so that

shoppers can make a good decision about whether to add the "additional item" to their shopping cart.

- **Long Description**—Shoppers see this description when they go to a package detail page. Price and options (such as size and color) appear below the description on the package detail page. You should be sure to describe each of the products that are included in the package when you compose the Long Description. You may also 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 as well. Depending on the chosen store or category layout, shoppers may add some packages 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 the Short Description field and the Long Description field. HTML entered in these fields must be properly formatted. It will undergo a validation process and any improperly formatted HTML will not be accepted. We recommend you become proficient in authoring HTML before you attempt to add HTML to these fields. For more information about using HTML or CSS, please see the *Marketplace uStores Layout Guide*.

Important! In order to ensure that Marketplace remains a secure environment for processing commerce transactions, fields that accept HTML in the Operation Center will not accept HTML form tags, iframe tags, object tags, and some additional code—including JavaScript.

- 2 Use the following two fields to indicate whether the package will be offered to shoppers as an additional item during the checkout process:
 - **Should this be offered as an additional item at checkout?**—If you choose Yes for this option, any shopper who places a product from this store in their shopping cart and then initiates the checkout process will see an additional page at the beginning of the checkout process. This page will provide the shopper with the option of adding the package that you are now creating to their cart. By offering your shoppers additional items during checkout, you can help increase revenue by bringing special items to the attention of your customers.
 - **Should this be offered only as an additional item at checkout?**—(Only available if you chose Yes for the previous option.) If you choose Yes for this option, then this package will **ONLY** be available as an additional item during the checkout process. In other words, shoppers will not see the package on store pages or

product category pages: the product will only be available once the checkout process has been initiated and the shopper has at least one item from this store in their cart.

- 3 Choose the allowed payment methods for this package. For more information about payment methods, see **"Notes on Payment Methods" on page 209.**

Important! If you do not choose any payment methods, the package will not be displayed to shoppers. For the package to be displayed, you must choose at least one payment method.

- 4 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.

- 5 Click the Continue button. The Miscellaneous Settings page appears.

Add Package: Miscellaneous Settings

- 1 Complete the following fields.
 - **Shipping Class**—Choose a shipping class that contains delivery methods appropriate for the package. If the package contains products that do not require delivery, see **"Shipping Classes When Delivery is Not Required" on page 259** for more information about setting up a shipping class. For more information about shipping classes, see **"Shipping Classes" on page 212.**
 - **Special Authorization is required to purchase product**—If the purchase of this package requires the customer to provide

additional information that can be used to authorize the purchase (such as a password), choose the Yes radio button. Also, enter text in the "Special Authorization Question" field. This prompt will appear on the package page. In addition you must make an entry in the "Special Authorization Answer" field. The customer's entry will be validated against this value. If you make no entry in the "Special Authorization Answer" field, then ANY customer entry will be accepted in the "Special Authorization Answer" field.

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 , "User Groups and User Authentication" on page 142.

- **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 package.

2 Click the Continue button. The Upload Images page appears.

Add Package: Images

Cup Set : Add Package
Print Page 

Set images for the package. Images can be edited and removed after package creation. Use graphics in JPG, GIF, or PNG formats. Maximum file size is 250K.

[Back To Products](#)

Upload images for Stores

Best results is using an image with the recommended W x H: 250 x 250 pixels

No Images

[Upload full size image](#)

Best results is using an image with the recommended W x H: 80 x 80 pixels

No Images

[Upload thumbnail image](#)

Upload images for Mobile

Best results is using an image with the recommended W x H: 200 x 200 pixels

No Images

[Upload full size image](#)

Best results is using an image with the recommended W x H: 50 x 50 pixels

No Images

[Upload thumbnail image](#)

[Continue](#)
[Cancel](#)

1 Click the "Upload full size image" button (or the "Upload thumbnail image" button) 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 package images are best displayed at 250 pixels wide by 250 pixels high.
- Thumbnail package 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.

Important! It is your responsibility to ensure that you have all necessary rights for the images you upload. Images that you did not create (such as images on other web sites) are typically protected by copyright law and should not be uploaded for use in Marketplace unless you have received permission from the copyright holder.

- 2 Click the Continue button. The Items for Sale page appears.

Add Package: Items for Sale

Print Page

Set miscellaneous settings for the package. Settings can be edited after package creation.

[Back To Products](#)

Items for Sale	Stock Number	Inventory	Quantity in Package	Item Price	Price Override	Total Price	Web	Mobile
1	<input type="text"/>					\$60.00	Enabled ▼	Enabled ▼
Mug with College Mug text	2366348	Not Tracked	1 <input type="text"/>	\$15.00	<input type="text"/>	\$15.00	Enabled	Enabled
Mug with College Rocks text	7503563	Not Tracked	1 <input type="text"/>	\$15.00	<input type="text"/>	\$15.00	Enabled	Enabled
Mug with Good Ideal text	2444605	Not Tracked	1 <input type="text"/>	\$15.00	<input type="text"/>	\$15.00	Enabled	Enabled
Mug with heart	3564067	Not Tracked	1 <input type="text"/>	\$15.00	<input type="text"/>	\$15.00	Enabled	Enabled

[Assign Random Stock Number](#)

Check to see if stock number is already used

[Continue](#) [Cancel](#)

This page shows the products in the package and some basic configuration information on each product. If one or more of the products in the package have product options (such as size or color), this page will show all combinations of the products and options. These combinations are indicated in the "Items for Sale" column.

You can configure the availability of each combination (i.e., each "Item for Sale"). For example, take the case of a package that contains a shirt and a ballcap, in which the shirt has an option for size (medium, large, extra-large). In this situation, the following Items for Sale would be displayed: 1) shirt (medium) and ballcap, 2) shirt (large) and ballcap, and 3) shirt (extra-large) and ballcap.

You can configure each "Item for Sale" separately, with its own stock number and availability status. In addition, you can set price overrides for each product in each "Item for Sale."

1 Complete the following fields:

- **Stock Number**—You must enter a stock number for the package. This number can be a UPC number or any other number of value to your store or organization. Click the Assign Random Number button to have Marketplace automatically assign a stock number to all Items for Sale. 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.
- **Quantity in Package**—For each product in an Item for Sale, you can specify the product quantity that will be included in the package. This value is 1 by default; however, if you intend to include a quantity greater than 1, be sure to edit this field. For example, if a package represents a table and four chairs, you might use a quantity of 1 for the table and a quantity of 4 for the chairs.
- **Price Override**—You can establish a price override for each product in a package. In fact, a price override can be established for each product in an Item for Sale. For example, let's assume you have a package with a shirt and a ballcap. The shirt is available with an option for size, and the following option values are available: medium, large, and extra-large. In this case, maybe you would like a greater price for the extra-large shirt. The price override fields can be used to establish a price override for each option value.

The price of a package is simply the sum of the prices for each item in the package. By using price overrides, you can establish discount pricing.

Note: Once a price override is established, this price will be used regardless of any future changes to the base price for the product. For example, if you establish a price override, but at a future date, you lower the product's base price, the price override will continue to be used, regardless of whether it is lower or higher than the new product price.

2 Use the Enable fields:

Each Item for Sale (each combination of products and product option values) can be enabled/disabled separately. This functionality can be

valuable if there are particular option values that you don't want to include in the package. For example, assume you have tables that are available in oak and maple. The oak tables have sold well, but not the maple sets. So now you would like to encourage customers to buy the maple sets by offering the maple tables in a discounted table/chair package. So you disable the oak Item for Sale, and enable the maple Item for Sale.

- 3 Click the Confirm button. The Status page next appears.

Add Package: Status

Print Page 

Upon confirmation, package will be added to available packages. Packages are enabled by default. Enabled packages are viewable in stores.

[Back To Products](#)

Store Status

Enabled

Disabled

Schedule Status

24-hour (example: 00 for Midnight) Enable Date:  Enable Hour:

Store Time Zone: Greenwich Mean Time Disable Date:  Disable Hour:

Mobile Status

Enabled

Disabled

Schedule Status

24-hour (example: 00 for Midnight) Enable Date:  Enable Hour:

Store Time Zone: Greenwich Mean Time Disable Date:  Disable Hour:

[Confirm](#) [Cancel](#)

- 1 Choose from the enable options:
 - **Enabled**—If you choose this option, the package will be immediately available to buyers once you click the Confirm button.
 - **Disabled**—If you choose this option the package will not be available to shoppers until you later enable it.
 - **Schedule Status**—If you choose the Schedule Status button, you can use the date and hour fields to enable and/or disable a package on a specified date and hour. Both a date and hour must be selected. Hours are listed in military format. (For example, 15 is 3 p.m.) The enable and disable fields can be used together or separately. When an enable date and hour are selected, you do not need to enter a disable date and hour. Likewise, when you enter a disable date and hour, you do not need to enter an enable date and hour.

Note: The time zone for the enable and disable hour is established on the Store General Settings page, as described in "[General Settings](#)" on page 162.

- 2 Click the Confirm button. Your package has been successfully added to your store! The Category page next appears.

Add Package: Categories

Mall Category Assignments	
No options selected	6 options available
	<ul style="list-style-type: none"> Clothing Clothing - Ballcaps Clothing - Sweatshirts Clothing - T-Shirt Events Supplies

Store Category Assignments	
No options selected	7 options available
	<ul style="list-style-type: none"> (Featured Items - Point of Sale only) (No category - only orderable via direct link) (No category - not orderable) Brick Walk Mugs Jewelry Apparel

When you reach this page, the process of creating the package has already been completed; however, now you have an opportunity to assign the package to one or more categories. These categories can be Marketplace mall-level categories and/or store-level categories.

- 1 For each category you would like to use for this package, choose the category so that it moves to the left column. You can choose Marketplace mall categories (for more information, see "[Mall Product Categories](#)" on page 111) and store categories (for more information,

see "**Store Product Categories**" on page 217). You can select multiple categories. If you add any categories by accident, you can easily remove those categories by choosing the category names in the left column, which moves these categories back to the right column.

- 2 When you are done with the category assignments, click the Continue button.

5.4 Managing Products in a Store

Once products are established, the product settings can be modified. In this section, we'll look at two Operations Center pages and the settings that they provide:

- **The Products page**—Lists all the products in the store and provides editable settings for category assignments and product availability.
- **The Product Settings page**—Lists the main settings for an individual product.

Several other pages that you access from the Product Settings page provide additional settings, such as the View Items for Sale page, the Add Options page, Manage Modifiers page, the Manage Status page, and the Manage Category Assignments page. These additional pages will be described in subsequent sections of this guide.

Using the Products Page

The Products page provides a wide range of functionality regarding Marketplace products. To open the Products page, the store manager or merchant manager navigates to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products. The Products page appears.

Architectural Supplies Products Print Page 

Click on links to access product settings, items for sale, and modifiers.

[Add Product](#) [Import Product](#) [Related Items](#)

Products

Show entries Search:

<input type="checkbox"/>	Name	Type	Items for Sale	Quantity	Store Category	Web	Mobile	
<input type="checkbox"/>	additional item	Donation	1	Not Tracked	(Store Home Page)	Enabled	Enabled	
<input type="checkbox"/>	Adjustable Triangle	Generic	1	Not Tracked	Drawing Equipment	Enabled	Enabled	
<input type="checkbox"/>	Computer	Generic	2	Varies by Item for Sale	Drawing Equipment	Enabled	Enabled	
<input type="checkbox"/>	Dusting Brush	Generic	1	Not Tracked	Drawing Equipment	Enabled	Enabled	
<input type="checkbox"/>	French Curve	Generic	1	Not Tracked	Drawing Equipment	Enabled	Enabled	
<input type="checkbox"/>	Lead Holder	Generic	3	Varies by Item for Sale	Pencils	Enabled	Enabled	
<input type="checkbox"/>	Lettering Guide	Generic	1	Not Tracked	Pens	Enabled	Enabled	
<input type="checkbox"/>	Library Fund	Donation	2	Varies by Item for Sale	(Store Home Page)	Enabled	Enabled	
<input type="checkbox"/>	Mechanical Pencil	Generic	2	Varies by	Pencils	Enabled	Enabled	

The buttons at the top of the page provide the following functionality:

- **Add Product**—Select the Add Product button to launch the Add Product process. The process of adding a product is described in "Adding a New Product" on page 1.
- **Import Product**—Select the Import Product button if you have prepared a CSV file that describes all the products that you would like to import. The import process is described in "[Importing Product Lists](#)" on page 261.
- **Related Items**—Select the Related Items button to manage related item groups that have already been created. Management of related items is described in "[Managing Related Products](#)" on page 308. (The process for creating related item groups is described in "[Creating Related Product Groups](#)" on page 281.)

Additional functionality is available within the Products table, as described in the following sections.

Editing Product Settings

To edit the settings for an individual product, click on the product name in the Name column. The Product Settings page will then appear. For more information about the Product Settings page, see "[Editing Products](#)" on page 283.

Editing Category Assignments

The current store category assignments for each product are displayed in the Store Category column. (Mall category assignments are not displayed on the Products page.)

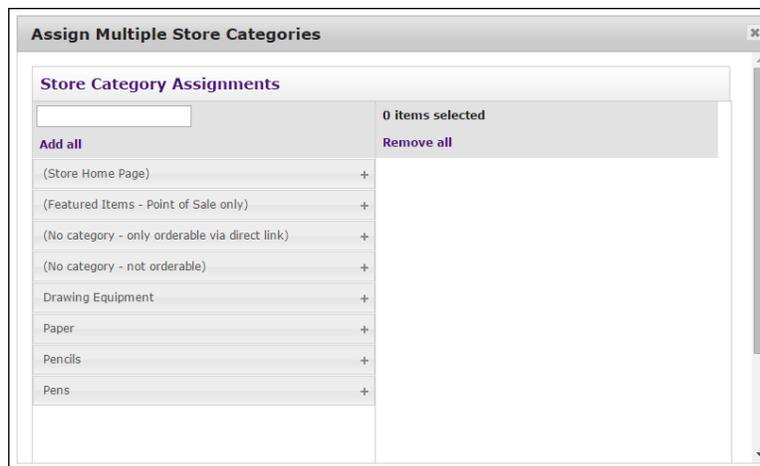
To edit the category assignments of an individual product, move your mouse pointer over the Gear icon (in the far right column) of the corresponding product. The Gear flyout menu will appear. Choose Assign/Remove Categories. The Manage Category Assignments page will appear. You can use the Manage Category Assignments page to add and remove category assignments for the active product. For more information about the Manage Category Assignments page, see ["Managing Category Assignments" on page 312](#).

You can also add or remove category assignments for multiple products at the same time. To manage category assignments for multiple products, select the checkbox in the far left column for each product. Then move your mouse pointer over the Gear icon in the heading of the far right column. The Gear flyout menu will appear, with several options.

The Gear flyout menu includes the following options regarding category assignments:

- Assign Multiple Mall Categories
- Remove Multiple Mall Categories
- Assign Multiple Store Categories
- Remove Multiple Store Categories

When you choose one of these menu selections, a modal window will appear that shows the available categories. Here is an example of what the modal window looks like:



This modal window allows you to modify category assignments.

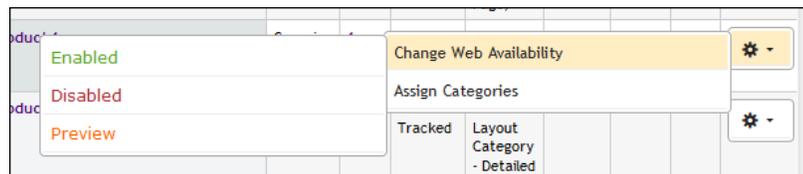
You can use the modal window to add and remove category assignments for the products that you selected. Click the + [plus] sign in the left column for each category you would like to add. If you would like to remove any

category assignments, click the - [minus] sign in the right column for each corresponding category. For more information about adding and removing category assignments, see ["Managing Category Assignments" on page 312](#).

Editing Product Availability

The availability of each product is displayed in the Web column. This field will say Enabled (the product is available for shoppers), Disabled (the product is NOT available for shoppers), or Preview (the product is in preview mode and is NOT available for shoppers).

To edit the availability of an individual product, move your mouse pointer over the Gear icon (in the far right column) of the corresponding product. The Gear flyout menu will appear.



The Gear flyout menu in the column heading includes options for product availability.

From the flyout menu, select Change Web Availability and then choose Enabled, Disabled, or Preview.

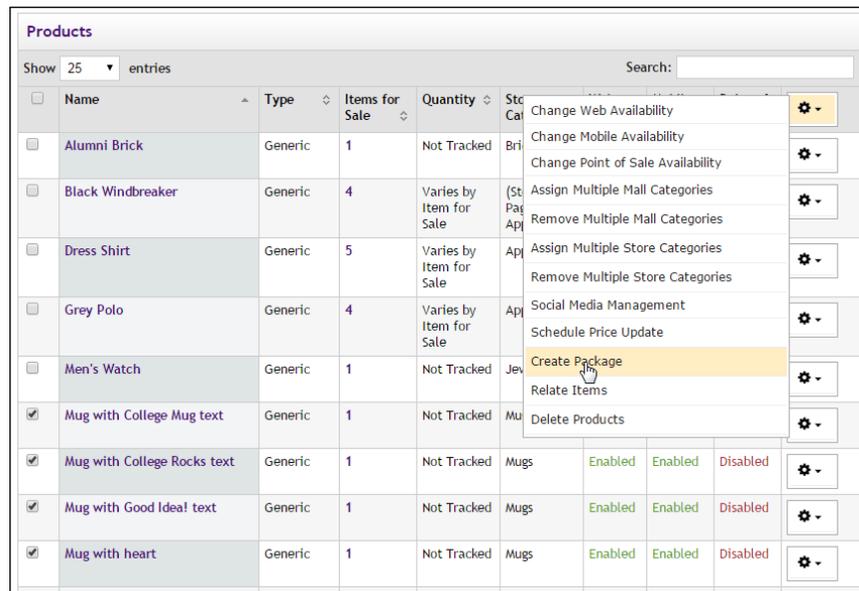
You can also change the availability of multiple products at the same time: select the checkbox in the far left column for each product. Then move your mouse pointer over the Gear icon in the heading of the far right column. The Gear flyout menu will appear. From this flyout menu, choose Change Web Availability. Then choose Enabled, Disabled, or Preview.

For more information about product status/availability, see ["Product Status Management" on page 352](#)

Creating Packages

A package is a group of products offered as a set. The products that will be part of the package must have previously been added as individual products in Marketplace. The process of creating a package involves first selecting which products should be included in the package and then configuring the package settings. These settings include the allowed payment methods (which can be different than the payment methods used for the individual products), descriptions, images, product status (including the ability to schedule status changes), category assignments, and more.

To add a package, select the products that you would like to include in the package by selecting the checkbox in the left column for each product. Then mouseover the Gear icon in the right column header. A flyout menu will then appear.



Choose Create Package from the flyout menu.

The Add Package process will be initiated. This process includes several pages of configuration settings. These pages and settings are described in **"Adding a Package" on page 266.**

Managing Social Media Availability

To manage social media availability for an individual product, move your mouse pointer over the Gear icon (in the far right column) of the corresponding product. The Gear flyout menu will appear.



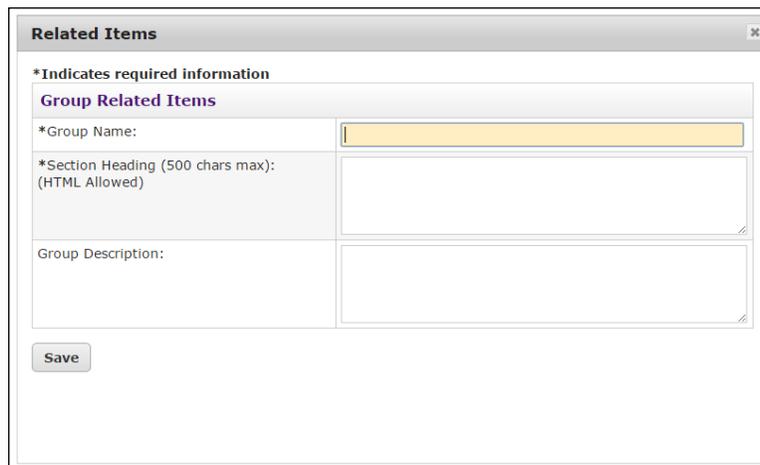
The Gear flyout menu in the column heading includes options for product availability.

Select Social Media Management from the flyout menu. When you select Social Media Management, another flyout appears. This flyout lists Facebook, LinkedIn, and Twitter. For each of these social media options, you can select Enable or Disable.

Creating Related Product Groups

Marketplace allows you to display related products when a customer views the Product Details page for a specific product. When customers see these related products, they may be encouraged to make an additional purchase. Management for related products takes place on the Products page.

To choose related products, select the checkboxes for all the products that you would like to link as related. Then move your mouse pointer over the Gear icon in the far right column header. The Gear flyout menu will appear. Select "Relate Products" from the menu. The Related Items modal page then appears on top of the Products page.



You create Related Items groups by using this page.

On this modal page, the following fields appear:

- **Group Name**—This field is required. This name will appear on the Related Items Groups page in the Marketplace Operations Center. This name does not appear to customers.
- **Section Heading**—Your entry in this field will be displayed to customers as a heading for the Related Items section on the Product Details page, so be sure your entry makes sense in this context. For example, you text might say "You might also like ..." or "Be sure to also consider these products:". This field accepts HTML. Maximum field length: 500 characters.
- **Group Description**—This description will appear on the Related Items Groups page in the Marketplace Operations Center. You can use this description to help you remember the purpose of the group.

For an example of how Related Products are displayed to customers, go to ["Related Products" on page 73](#).

Scheduling Price Updates

You can use the Products page to schedule price updates. To start this process, select one or more product checkboxes in the far left column. Then move your mouse pointer over the Gear icon in the far right column header. The Gear flyout menu will appear. Select "Schedule Price Update" from the menu.

Note: You can also schedule a price update for a single product by using the Gear icon that is in the same row as the product name. In addition, for a single item with no product options associated with it, you can update the price by going to the Product Settings page for an individual product in the Op Center and choosing the Schedule Price Change link.

The screenshot shows the 'Architectural Supplies Products' page. At the top, there are buttons for 'Add Product', 'Import Product', and 'Related Items', along with a 'Product Barcode' field. Below this is a table of products. The table has columns for Name, Type, Items for Sale, Quantity, and Store Category. A gear icon in the rightmost column header has a flyout menu open, listing various actions. The 'Schedule Price Update' option is highlighted in yellow.

Name	Type	Items for Sale	Quantity	Store Category	Actions
<input type="checkbox"/> additional Item	Donation	1	Not Tracked	(Store H Page)	Change Web Availability, Change Mobile Availability, Change Point of Sale Availability, Social Media Management, Assign Multiple Mall Categories, Remove Multiple Mall Categories, Assign Multiple Store Categories, Remove Multiple Store Categories, Relate Items, Schedule Price Update
<input checked="" type="checkbox"/> Adjustable Triangle	Generic	1	Not Tracked	Drawing Equipme	
<input type="checkbox"/> Computer	Generic	2	Varies by Item for Sale	Drawing Equipme	
<input checked="" type="checkbox"/> Dusting Brush	Generic	1	Not Tracked	Drawing Equipme	
<input checked="" type="checkbox"/> French Curve	Generic	1	Not Tracked	Drawing Equipme	
<input type="checkbox"/> Lead Holder	Generic	3	Varies by Item for Sale	Pencils	Enabled, Enabled, Disabled

The Gear flyout menu in the column heading includes an option for scheduling a price update.

When you select Schedule Price Update from the Gear flyout menu, the Schedule Price Update page appears.

Print Page 

Settings on this page manage updating and scheduling product price changes. If you do not want to change the price for a product listed, leave the New Price field blank.

[Back To Products](#)

Schedule Price Update

24-hour (example: 00 for Midnight)	Update Price Date: <input type="text" value=""/>
Store Time Zone: Central Standard Time	Update Price Hour: <input type="text" value=""/>

Items for Sale	Current Price	New Price
Adjustable Triangle	\$13.00	<input type="text" value=""/>
Dusting Brush	\$12.00	<input type="text" value=""/>
French Curve	\$6.00	<input type="text" value=""/>

[Save Schedule](#)

Scheduled Price Updates

No Scheduled Price Updates

Scheduled Price History

No Scheduled Price History

The Schedule Price Update allows you to set a date and hour for the price change.

Enter a date in the Update Price Date field or select a date using the calendar wizard. If you enter a date, be sure to enter the date in this format: mm/dd/yy.

Select an hour from the Update Price Hour drop-down list. Hours are listed by the 24-hour clock (also known as military time). So 3 p.m. appears as 15 and 11 p.m. appears as 23.

Enter the new price for each product/item displayed in the Items for Sale table. Then select the Save Schedule button.

The price change then appears in the Schedule Price Updates table.

Note: You can determine if a price change has already been scheduled for any of the products that you selected by using the Schedule Price Updates table. You can delete a scheduled price update by selecting the Delete link in the Action column.

5.5 Editing Products

Use the following steps to edit a product:

- 1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products. The [Store Name] Products page appears.
- 2 Click the product name link. The Product Settings page appears.
- 3 Edit the fields on Product Settings page. All the fields are described below in the "Field descriptions" section.

Adjustable Triangle: Product Settings Print Page

Settings on this page configure the product.

[Back To Products](#)

General Settings

Id:	47
Type:	Generic
Name: (200 chars max)	<input type="text" value="Adjustable Triangle"/>
Items for Sale (1):	View Add Options
Modifiers:	Add Modifier
Web status:	Enabled Manage status

Product is Included In These Packages

Drafting Kit

Category Settings

	Assignments	Actions
Mall Assignments:	Supplies	Manage assignments
Store Assignments:	Drawing Equipment	Manage assignments

Description Settings

Short Description (500 chars max): (HTML Allowed)	<input type="text" value="Professional quality acrylic triangles with bevel and inking edge. Rise: 12 , Slope: 12 - 17 , Degree: 0-45, 45-90"/>
Long Description (30,000 chars max): (HTML Allowed)	<input type="text" value="Professional quality acrylic triangles with bevel and inking edge. Rise: 12 , Slope: 12 - 17 , Degree: 0-45, 45-90"/>

The top portion of the Product Settings page.

Field descriptions:

General Settings

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.

Items for Sale

If "options" such as size or color were established for the product, then the product is available as multiple "Items for Sale" (with separate inventory for each "item for sale"). The following configuration options are available:

- You can use the View link to view the "Items for Sale" and to edit the product settings for stock number, price, inventory, and other settings that apply to a single "item for Sale." For more information about editing "Items for Sale," see the "Viewing and Modifying Items for Sale" section of ["Using Product Options" on page 315](#).
- If product options have NOT been configured, the "Add Options" link appears. This link can be used to add options and create multiple "Items for Sale." For more information about adding product options, see the "Adding Product Options" section of ["Using Product Options" on page 315](#).
- If product options have been configured, the "Modify Options" link appears. This link can be used to modify the existing options (and new options). For more information about modifying product options, see the "Modifying Product Options" section of ["Using Product Options" on page 315](#).

Modifiers

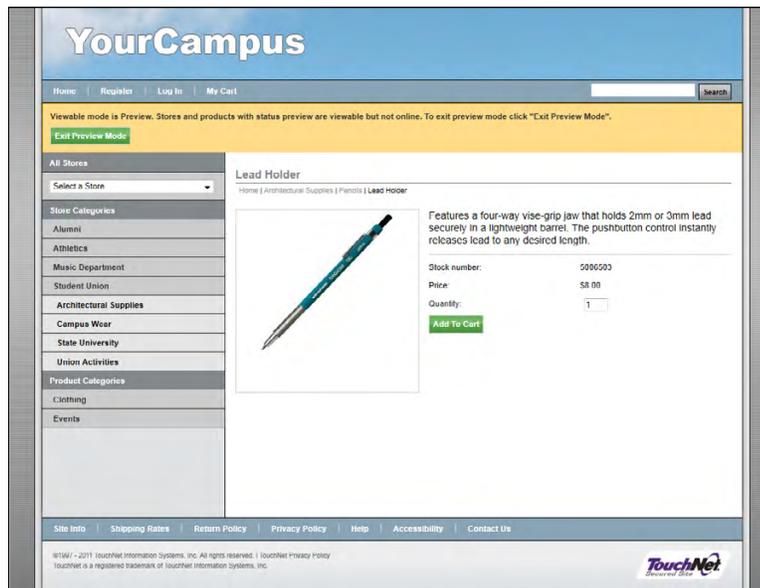
A "modifier" is a custom ordering option. For example, a modifier could be used to add a monogram to a shirt (the shirt is the product and the monogram is a modifier), or a modifier could be used to collect a lunch preference or a conference session selection when a shopper is registering for a conference (the conference registration is the product and the lunch preference and the session selection are modifiers). The modifier doesn't change the stock number of the product, but it might change the price. The following configuration options are available:

- If modifiers have NOT been configured, the "Add Modifier" link appears. This link can be used to add modifiers. For more information about adding modifiers, see the "Add a Product Modifier" section of ["Using Product Modifiers" on page 330](#).
- If modifiers have been configured, the "Manage Modifiers" link appears. This link can be used to modify existing modifiers (and add new modifiers). For more information, see the "Editing a Product Modifier" section of ["Using Product Modifiers" on page 330](#).

Web Status

This field will say ENABLED, DISABLED, or PREVIEW. The status of the product can be changed by selecting the "Manage status" link. For more about managing the status of a product, see ["Product Status Management" on page 352](#).

If a product is in PREVIEW mode, a link named "View" also appears in the "Store Status" section. When you select this link, a new browser window is opened that displays the product.



Preview mode allows you to see what shoppers will see.

An orange status bar indicates that the product is being displayed in preview mode. You can leave preview mode by selecting the Exit Preview Mode button.

Products in preview mode are not available to shoppers. Once a product is placed in preview mode, it can only be reached by using the preview link on the Product Details page.

You can use PREVIEW mode to test how products will display, which can be especially useful if you have added HTML to the Long Description field.

Product is Included in These Packages

If the product is included in one or more packages, these packages are listed in this section. The name of each package is a link to the Package Settings page for that package. For more about editing packages, see ["Editing a Package" on page 299](#).

Category Settings

Mall Assignments

Products can be assigned to multiple mall product categories. These assignments are displayed in the Assignments column. If you would like to change these assignments or add new assignments, click the "Manage assignments" link in the Actions column. The Manage Category Assignments page the appears.

Store Assignments

Products can be assigned to multiple store product categories. These assignments are displayed in the Assignments column. If you would like to change these assignments or add new assignments, click the "Manage assignments" link in the Actions column. The Manage Category Assignments page then appears.

Mall Category Assignments

	0 items selected
<input type="text"/>	
Add all	Remove all
Alumni +	
Clothing +	
Events +	
Services +	

Store Category Assignments

	0 items selected
<input type="text"/>	
Add all	Remove all
(Store Home Page) +	
(No category - only orderable via direct link) +	
(No category - not orderable) +	
Clothing +	
Events +	

The Manage Category Assignments page allows you to assign mall and store categories to a single product.

You can assign your product to multiple mall categories (for more information, see ["Mall Product Categories" on page 111](#)) and store categories (for more information, see ["Store Product Categories" on page 217](#)). Click the + [plus] sign in the left column for each category you

would like to add. If you would like to remove any category assignments, click the - [minus] sign in the right column for each corresponding category.

Description Settings

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.

In addition, for products that use the "Should this be offered as an additional item at checkout?" option, the short description will appear for shoppers on the "Additional Items" page, which is the first page of the checkout process. Be sure to enter appropriate text in this field so that shoppers can make a good decision about whether to add the "additional item" to their shopping cart.

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 the Short Description field and the Long Description field. HTML entered in these fields must be properly formatted. It will undergo a validation process and any improperly formatted HTML will not be accepted. We recommend you become proficient in authoring HTML before you attempt to add HTML to these fields. For more information about using HTML or CSS, please see the *Marketplace uStores Layout Guide*.

Important! In order to ensure that Marketplace remains a secure environment for processing commerce transactions, fields that accept HTML in the Marketplace Operations Center will not accept HTML form tags, iframe tags, object tags, and some additional code—including JavaScript.

Checkout Options	
Should this be offered as an additional item at checkout?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Should this be offered only as an additional item at checkout? (Only if yes to question above)	<input type="radio"/> Yes <input checked="" type="radio"/> No
Show stock number to shopper:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show quantity prompt to shopper:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Product purchase requires Special Authorization:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Prompt for Special Authorization: (200 chars max)	<input type="text"/>
Special Authorization value: (50 chars max)	<input type="text"/>
Shipping/handling message:	<input type="text"/>
Product Settings	
Price is in USD (\$)	
Stock Number (30 chars max):	<input type="text" value="1542751"/>
Barcode Number:	<input type="text" value="10000000310"/>
Price:	<input type="text" value="20.00"/> Schedule Price Change
On Sale:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Limit Order Quantity:	<input type="radio"/> Yes, Maximum Order Quantity: <input type="text"/> <input checked="" type="radio"/> No
Track Inventory:	<input checked="" type="radio"/> Yes, Current Quantity: <input type="text" value="20"/> <input type="radio"/> No
Out of Stock Message (This message will appear if the item goes out of stock): (500 chars max) (HTML Allowed)	<input type="text"/>
Back Orderable:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Auto Fulfill:	<input type="radio"/> Yes <input checked="" type="radio"/> No

The Checkout and Product options on the Product Settings page.

Checkout Options

Should this be offered as an additional item at checkout?

If you choose Yes for this option, any shopper who places a product from this store in their shopping cart and then initiates the checkout process will see an additional page at the beginning of the checkout process. This page will provide the shopper with the option of adding the product that you are now editing to their cart. By offering your shoppers additional items during checkout, you can help increase revenue by bringing special items to the attention of your customers.

Should this be offered only as an additional item at checkout?

(Only available if you chose Yes for the previous option.) If you choose Yes for this option, then this product will ONLY be available as an additional item during the checkout process. In other words, shoppers will not see the product on store pages or product category pages: the product will only be available once the checkout process has been initiated.

Show stock number to shopper

This option is set to Yes by default; however, if you would like to suppress the display of the stock number on uStores pages, select No.

Show quantity prompt to shopper

This option is set to Yes by default; however, if the quantity prompt is irrelevant for this product, you can remove it from uStores pages by selecting No.

Product purchase requires Special Authorization

If the purchase of this product requires the customer to provide additional information that can be used to authorize the purchase, choose the Yes radio button.

Prompt for Special Authorization

Shoppers must answer this prompt before they can add the product to their cart.

Special Authorization value

If you do NOT enter a value in this field, the shopper can enter any answer as the response to the Prompt for Special Authorization.

If you enter a value in this field, the shopper's entry must be identical to the Special Authorization value. If the shopper's entry is not identical, the shopper will not be able to add the product to their cart.

You should keep in mind that anyone who gets the answer can then purchase the product. For example, you might use the "Special Authorization" field in conjunction with a flier distributed on campus. The flier would describe the product and provide the answer for the "Prompt for Special Authorization. " Anyone who has seen the flier—as well as anyone who has been supplied the answer by any other means—can then purchase the product.

If you would like buyers to be authenticated before they purchase this product, you should establish a user group. For more information, see Section , "User Groups and User Authentication" on page 142.

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.

Product Settings

The Product Settings section of this page only appears if no "product options" have been created for the product. If "product options" have been created, the settings described in this section will instead appear on the Item for Sale Settings page, as described in ["Viewing and Modifying Items for Sale"](#) on page 324.

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.

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. Also, see ["Editing Donation Settings"](#) on page 296 for more information about how the product fields are different for donation products.

A link for Schedule Price Change appears beside (or below) the Price field. When this link is selected, the Schedule Price Update page appears.

Schedule Price Update Print Page

Settings on this page manage updating and scheduling product price changes. If you do not want to change the price for a product listed, leave the New Price field blank.

Back To Products
Back To Product Settings

Schedule Price Update

24-hour (example: 00 for Midnight) Store Time Zone: Central Standard Time	Update Price Date: <input type="text"/>  Update Price Hour: <input type="text"/>
--	--

Items for Sale	Current Price	New Price
Adjustable Triangle	\$13.00	<input style="width: 90%;" type="text"/>

Save Schedule

Scheduled Price Updates

Item	Scheduled Price	Scheduled Date	Scheduled Hour	Action
Adjustable Triangle	\$10.00	12/23/14	7:00	Delete

Delete History

Scheduled Price History

	Item	Scheduled Price	Scheduled Date	Scheduled Hour
<input type="checkbox"/>	Adjustable Triangle	\$13.00	12/12/14	15:00
<input type="checkbox"/>	Adjustable Triangle	\$11.00	12/12/14	14:00

The Schedule Price Update allows you to set a date and hour for the price change.

Enter a date in the Update Price Date field or select a date using the calendar wizard. If you enter a date, be sure to enter the date in this format: mm/dd/yy.

Select an hour from the Update Price Hour drop-down list. Hours are listed by the 24-hour clock (also known as military time). So 3 p.m. appears as 15 and 11 p.m. appears as 23.

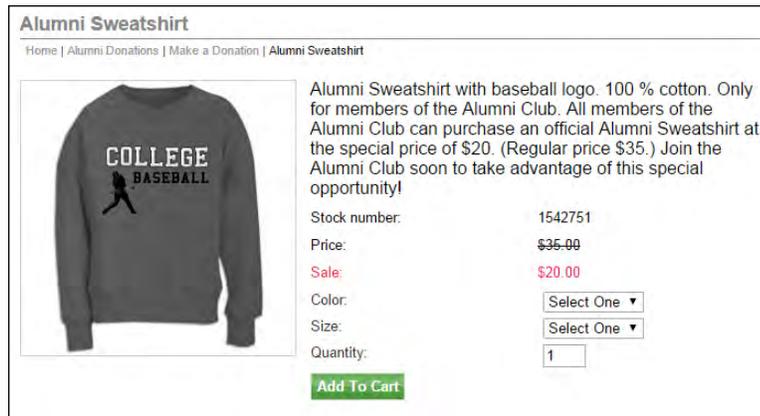
Enter the new price for each product/item displayed in the Items for Sale table. Then select the Save Schedule button.

The price change then appears in the Schedule Price Updates table.

Note: You can determine if a price change has already been scheduled by using the Schedule Price Updates table. You can delete a scheduled price update by selecting the Delete link in the Action column.

On Sale

When you choose Yes for the On Sale field, the product will appear in uStores with both the Regular Price (with stikeout) and the On Sale price (in red). To record an On Sale price, you simply need to change the price recorded in the Price field. When this field is changed, Marketplace will save the previous value, as well as the new value. The previous value will then become the Regular Price and the new value will become the Sale price.



When the On Sale setting is used, the regular price and the on sale price both appear on the Product Details page.

The On Sale price and the Regular Price will appear on the Product Details page, the Detailed Category page (if used), and the Name and Price Category page (if used). In addition, both prices will appear in the shopping cart and throughout the checkout process, as well as on confirmation e-mail messages to the customer.

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.

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: If the Auto Fulfill option is set to Yes and the "Days fulfiller must wait before fulfilling orders paid via ACH" is set to any value greater than zero, then the Auto Fulfill selection is automatically overridden for ACH purchases and manual fulfillment is required.

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.

Social Media Settings		
Name	Display?	Sort Key
 LinkedIn	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
 Twitter	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
 Facebook	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="text"/>

Option Settings	
Shipping class determines the shipping charge applied to purchases.	
Shipping Class:	<input type="text" value="regular"/>
Tax Class:	<input type="text" value="default tax rate"/>
CAPTCHA can be used to help prevent internet bots from making purchases.	
Require shoppers to respond to CAPTCHA before the product can be placed in their cart?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Example:	

Payment Method Settings	
Allowed Payment Methods:	<input type="checkbox"/> AmEx <input type="checkbox"/> Discover <input type="checkbox"/> INTERAC <input checked="" type="checkbox"/> MasterCard <input checked="" type="checkbox"/> Visa <input checked="" type="checkbox"/> webCheck
Days fulfiller must wait before fulfilling orders paid via ACH:	<input type="text"/>

The bottom portion of the Product Settings page.

Social Media Settings

Name

Three social media types are available: Facebook, LinkedIn, and Twitter.

Display

If Yes is selected, a link for the indicated social media type will appear with "share" functionality in uStores on the Product Details page: The "share" link will appear immediately below the Add to Cart button. In addition, if the detailed layout page is used for a product category page and this product is included in this category, then the "share" link will appear immediately below the Add to Cart button in the product category display of products. For an example of how "share" links appear on the uStores Product Details page, see ["Product Details Page" on page 88](#). And for an example of how "share" links appear on the uStores Product Category page (detailed layout), see ["Product Category Page \(Detailed Layout\)" on page 88](#).

Sort Key

You can use the Sort Key column to determine the display order for the social media icons on the Product Details page and the Product Category page (detailed layout).

Option Settings

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 259](#) for more information about setting up a shipping class appropriate for donations. For more information about shipping classes, see ["Shipping Classes" on page 212](#).

Tax Class

Choose a tax class appropriate for the product. If a product is configured for tax, the applicable rate is based upon the shipping address entered by the customer during the uStores checkout process. 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.

Note: The higher tax rate is not available when the Marketplace tax service is used.

If the customer was not required to enter a shipping address with the delivery method, then Marketplace will charge the tax based upon the default delivery location associated with the applicable shipping class for the product. In order for you to ensure that the appropriate tax rate is charged on a product in which no shipping is required—such as a digital product—we recommend that you use the Require Shipping Address checkbox. When this checkbox is selected, the customer will always be required to enter a shipping address and therefore the tax will be calculated based on this location. (As with any tax situation, you should contact your tax consultant to determine the applicable taxes.)

For more about tax classes, see ["Tax Account Codes" on page 120](#).

Override Default Accounting Code

This field appears if general ledger reporting has been turned on for the store. For more information about assigning an override accounting code to a product, choose your general ledger system: [Banner](#), [Colleague](#), or [PeopleSoft](#).

Require shoppers to respond to CAPTCHA before the product can be placed in their cart?

When Yes is selected, the shopper will see a CAPTCHA challenge prompt when they attempt to add the product to their shopping cart. The shopper must enter the code before they can continue. This field can be used to help prevent Internet bots from being used to purchase products, as bots cannot typically interpret CAPTCHA codes. Use of this field may be particularly relevant for a product in which the demand may be high and the inventory supply limited (such as parking places or a ticketed event).

Payment Method Settings**Allowed Payment Methods**

Choose allowed payment methods for this product using the checkboxes. For more information about payment methods, see "[Notes on Payment Methods](#)" on page 209.

Days fulfiller must wait before fulfilling orders paid via ACH

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.

Note: If the Auto Fulfill option is set to Yes and the "Days to Wait before processing ACH Payments" is set to any value greater than zero, then the Auto Fulfill selection is automatically overridden and manual fulfillment is required for orders that use ACH as the payment method..

**Editing
Donation
Settings**

Donations can be edited like generic products; however, the following additional fields also appear: Prompt for Donation Amount, the Donation amount fields, and a link to a setup page for Recurring Payments.

Note: In order for the Recurring Payments link to be available, the Auto Fulfill field must be set to Yes.

Donation Settings

Enter donation amounts from which the consumer may choose to purchase. User entered amount allows the consumer to enter the purchase amount.

Prompt for Donation Amount:

Price(s) displayed to consumer. Check to activate. All prices are in USD (\$))

Donation amount:	<input checked="" type="checkbox"/> User entered amount.
1	<input checked="" type="checkbox"/> 5.00 <input style="width: 80px;" type="text"/>
2	<input checked="" type="checkbox"/> 10.00 <input style="width: 80px;" type="text"/>
3	<input checked="" type="checkbox"/> 20.00 <input style="width: 80px;" type="text"/>
4	<input type="checkbox"/> 50.00 <input style="width: 80px;" type="text"/>
5	<input type="checkbox"/> 100.00 <input style="width: 80px;" type="text"/>

[Add More Selections](#)

Field descriptions:

- **Prompt for Donation Amount**—Donors will see the text that you enter in this field as a prompt for entering a donation amount (or selecting a pre-set amount).

Your donation amount:

- \$5.00
- \$10.00
- \$20.00
- \$50.00
- \$100.00
- Other

[Add To Cart](#)

If pre-set donation amounts are used, the prompt for donation amount appears above the pre-set donations amount.

Your donation amount:

[Add To Cart](#)

If pre-set donation amounts are not used, the prompt for donation amount appears to the left of the "user entered amount" field.

- **Donation amount**—This section provides two options: 1) You can select the "user entered amount" checkbox to provide a field for donors to enter their donation amount and 2) You can select one or more numerical checkboxes to configure pre-set donation amounts. All selected pre-set donation amounts will be presented to donors as donation amount options; a radio button will appear beside each value. Donors can only choose one value. If you need to configure more pre-set donation amounts, select the Add More Selections button.

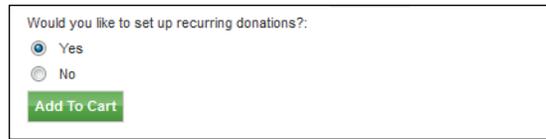
Editing Recurring Payments Settings

Donations can be edited like generic products; however, the following additional fields also appear: Prompt for Donation Amount, the Donation amount fields, and a link to a setup page for Recurring Payments.

Note: In order for the Recurring Payments link to be available, the Auto Fulfill field must be set to Yes.

Field descriptions:

- **Recurring Payments**—By clicking the View Setup link , you can set up a donation product to accept recurring payments from donors. When you click the View Setup link, the recurring payment fields are displayed.
- **Allow Recurring Payments?**—Turn on this option for donors by selecting Yes. If you select Yes, complete the rest of the options on this page. If you select 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 donor whether they want to make recurring payments. The prompt appears on the Product Details page.

A screenshot of a user interface prompt. The text reads "Would you like to set up recurring donations?". Below this text are two radio button options: "Yes" (which is selected) and "No". At the bottom of the prompt is a green button with the text "Add To Cart".

The recurring payments prompt appears before donors place the item in their shopping cart.

- **Maximum Duration**—Enter a number and specify whether it is a number of months or years. The maximum duration is 99 years. Donors who use a credit card cannot set up a donation period that exceeds the expiration date on their credit card.
- **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.

5.6 Editing a Package

Use the following steps to edit a package:

- 1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products. The [Store Name] Products page appears.
- 2 Click the package name link. The Package Settings page appears.

Note: You can tell packages from products by the entry in the Type column. The word Package will appear in this column for packages. In addition, for packages, the link View Package Sets will appear in the Items for Sale column.

- 3 Edit the fields on Product Settings page. All the fields are described below in the "Field descriptions" section.

Cup Set: Package Settings Print Page

Settings on this page configure the product.

[Back To Products](#)

General Settings

Id:	125
Type:	Package
Name: (200 chars max)	<input type="text" value="Cup Set"/>
Package Sets (1):	View
Web status:	Enabled Manage status

Category Settings

	Assignments	Actions
Mall Assignments:	None	Manage assignments
Store Assignments:	Mugs	Manage assignments

Description Settings

Short Description (500 chars max): (HTML Allowed)	<input type="text" value="A set of four cups with logos."/>
Long Description (30,000 chars max): (HTML Allowed)	<input type="text" value="A set of four cups with the following logos: 1) College Mug, 2) College Rocks, 3) Good Idea!, and 4) Heart."/>

The top portion of the Package Settings page.

Field descriptions:

General Settings

Name

Shoppers may see the package name in mall categories, store categories, and the store home page (depending on the package's category assignments). It also appears in order and billing confirmations and during fulfillment.

Package Sets

If "options" such as size or color were established for any of the products in the package, then the package is available as multiple package sets. You can use the View link to view the Package Sets page.

Cup Set : Package Sets Print Page 

Set miscellaneous settings for the package. Settings can be edited after package creation.

Products Included in Package

Product Name	Product Type	Action
Mug with College Mug text	Generic	Delete
Mug with College Rocks text	Generic	Delete
Mug with Good Ideal text	Generic	Delete
Mug with heart	Generic	Delete

Items for Sale	Stock Number	Inventory	Quantity in Package	Item Price	Price Override	Total Price	Web	Mobile
1	<input type="text" value="7717126"/>					\$40.00	Enabled <input type="button" value="v"/>	Enabled <input type="button" value="v"/>
Mug with College Mug text	2366348	Not Tracked	<input type="text" value="1"/>	\$15.00	<input type="text" value="10.00"/>	\$10.00	Enabled	Enabled
Mug with College Rocks text	7503563	Not Tracked	<input type="text" value="1"/>	\$15.00	<input type="text" value="10.00"/>	\$10.00	Enabled	Enabled
Mug with Good Ideal text	2444605	Not Tracked	<input type="text" value="1"/>	\$15.00	<input type="text" value="10.00"/>	\$10.00	Enabled	Enabled
Mug with heart	3564067	Not Tracked	<input type="text" value="1"/>	\$15.00	<input type="text" value="10.00"/>	\$10.00	Enabled	Enabled

The Package Sets page lists the products in the package and the Items for Sale.

On the Package Sets page you can change some of the package configuration settings, such as Price Overrides and availability status (Enabled or Disabled). You can also Delete products from a package (click the Delete link in the Products Included in Package section), as well as add additional products to a package (click the Add Products button below the Products Included in Package section).

Cup Set : Add Items to Package Print Page 

Add Items to Package.

[Back To Products](#)
[Back to Package Settings](#)
[Back to View Package Settings](#)

Products Included in Package

Product Name	Product Type
Mug with College Mug text	Generic
Mug with College Rocks text	Generic
Mug with Good Idea! text	Generic
Mug with heart	Generic

<input type="checkbox"/> Name	Type
<input type="checkbox"/> iiou	Generic
<input type="checkbox"/> Alumni Brick	Generic
<input type="checkbox"/> White Polo	Generic
<input type="checkbox"/> Grey Polo	Generic
<input type="checkbox"/> Paw Print Money Clip	Generic
<input type="checkbox"/> Men's Watch	Generic
<input type="checkbox"/> Paw Print Earrings	Generic
<input type="checkbox"/> Mug with Smiley Face	Generic
<input type="checkbox"/> Black Windbreaker	Generic
<input type="checkbox"/> Mug with Study Fuel text	Generic
<input type="checkbox"/> Turquoise Paw Print Ring	Generic
<input type="checkbox"/> Dress Shirt	Generic

[Continue](#)
[Cancel](#)

You can add more products to a package by using the Add Items to Package page.

The Add Items to Package page lists all products for the store. You can add any of these products to the package by selecting the corresponding checkbox in the left column and then selecting the Continue button.

Web Status

This field will say ENABLED, DISABLED, or PREVIEW. The status of package can be changed by selecting the "Manage status" link. For more about managing the status of a product/package, see "[Product Status Management](#)" on page 352.

If a package is in PREVIEW mode, a link named "View" also appears in the "Store Status" section. When you select this link, a new browser window is opened that displays the package as it would appear in uStores.

Packages in preview mode are not available to shoppers. Once a package is placed in preview mode, it can only be reached by using the preview link on the Product Details page.

You can use PREVIEW mode to test how packages will display, which can be especially useful if you have added HTML to the Long Description field.

Category Settings

Mall Assignments

Packages can be assigned to multiple mall categories. These assignments are displayed in the Assignments column. If you would like to change these assignments or add new assignments, click the "Manage assignments" link in the Actions column. The Manage Category Assignments page then appears.

Store Assignments

Packages can be assigned to multiple store categories. These assignments are displayed in the Assignments column. If you would like to change these assignments or add new assignments, click the "Manage assignments" link in the Actions column. The Manage Category Assignments page then appears.

For more information about assigning your package to multiple mall categories, see "[Mall Product Categories](#)" on page 111), and for more information about assigning your package to multiple store categories, see "[Store Product Categories](#)" on page 217)

Description Settings

Short Description

Shoppers see this short description in the detailed category 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 packages 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.

In addition, for packages that use the "Should this be offered as an additional item at checkout?" option, the short description will appear for shoppers on the "Additional Items" page, which is the first page of the checkout process. Be sure to enter appropriate text in this field so that shoppers can make a good decision about whether to add the "additional item" to their shopping cart.

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 package 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 packages 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 the Short Description field and the Long Description field. HTML entered in these fields must be properly formatted. It will undergo a validation process and any improperly formatted HTML will not be accepted. We recommend you become proficient in authoring HTML before you attempt to add HTML to these fields. For more information about using HTML or CSS, please see the *Marketplace uStores Layout Guide*.

Important! In order to ensure that Marketplace remains a secure environment for processing commerce transactions, fields that accept HTML in the Marketplace Operations Center will not accept HTML form tags, iframe tags, object tags, and some additional code—including JavaScript.

Checkout Options

Should this be offered as an additional item at checkout?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Should this be offered only as an additional item at checkout? (Only if yes to question above)	<input type="radio"/> Yes <input checked="" type="radio"/> No
Show stock number to shopper:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show quantity prompt to shopper:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Product purchase requires Special Authorization:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Prompt for Special Authorization: (200 chars max)	<input style="width: 100%;" type="text"/>
Special Authorization value: (50 chars max)	<input style="width: 100%;" type="text"/>

Social Media Settings

Name	Display?	Sort Key
Facebook	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input style="width: 50%;" type="text"/>
LinkedIn	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input style="width: 50%;" type="text"/>
Twitter	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input style="width: 50%;" type="text"/>

Option Settings

Shipping class determines the shipping charge applied to purchases.

Shipping Class:

CAPTCHA can be used to help prevent internet bots from making purchases.

Require shoppers to respond to CAPTCHA before the product can be placed in their cart? Yes No

Example: KvRJVhZ

The Checkout and Product options on the Product Settings page.

Checkout Options

Should this be offered as an additional item at checkout?

If you choose Yes for this option, any shopper who places a product from this store in their shopping cart and then initiates the checkout process will see an additional page at the beginning of the checkout process. This page will provide the shopper with the option of adding the package that you are now editing to their cart. By offering your shoppers additional items during checkout, you can help increase revenue by bringing special items to the attention of your customers.

Should this be offered only as an additional item at checkout?

(Only available if you chose Yes for the previous option.) If you choose Yes for this option, then this package will ONLY be available as an additional item during the checkout process. In other words, shoppers will not see the package on store pages or category pages: the package will only be available once the checkout process has been initiated.

Show stock number to shopper

This option is set to Yes by default; however, if you would like to suppress the display of the stock number on uStores pages, select No.

Show quantity prompt to shopper

This option is set to Yes by default; however, if the quantity prompt is irrelevant for this package, you can remove it from uStores pages by selecting No.

Product purchase requires Special Authorization

If the purchase of this package requires the customer to provide additional information that can be used to authorize the purchase, choose the Yes radio button.

Prompt for Special Authorization

Shoppers must answer this prompt before they can add the package to their cart.

Special Authorization value

If you do NOT enter a value in this field, the shopper can enter any answer as the response to the Prompt for Special Authorization.

If you enter a value in this field, the shopper's entry must be identical to the Special Authorization value. If the shopper's entry is not identical, the shopper will not be able to add the package to their cart.

You should keep in mind that anyone who gets the answer can then purchase the package. For example, you might use the "Special Authorization" field in conjunction with a flier distributed on campus. The flier would describe the package and provide the answer for the "Prompt for

Special Authorization. " Anyone who has seen the flier—as well as anyone who has been supplied the answer by any other means—can then purchase the package.

If you would like buyers to be authenticated before they purchase this package, you should establish a user group. For more information, see Section , "User Groups and User Authentication" on page 142.

Social Media Settings

Name

Three social media types are available: Facebook, LinkedIn, and Twitter.

Display

If Yes is selected, a link for the indicated social media type will appear with "share" functionality in uStores on the Product Details page: The "share" link will appear immediately below the Add to Cart button. In addition, if the detailed layout page is used for a product category page and this product is included in this category, then the "share" link will appear immediately below the Add to Cart button in the product category display. For an example of how "share" links appear on the uStores Product Details page, see "[Product Details Page](#)" on page 88. And for an example of how "share" links appear on the uStores Product Category page (detailed layout), see "[Product Category Page \(Detailed Layout\)](#)" on page 88.

Sort Key

You can use the Sort Key column to determine the display order for the social media icons on the Product Details page and the Product Category page (detailed layout).

Option Settings

Shipping Class

Choose a shipping class that contains delivery methods appropriate for the package. For more information about shipping classes, see "[Shipping Classes](#)" on page 212.

Note: In order to use the Auto Fulfill option for a package, all products in the package must be configured to use Auto Fulfill. If one or more products in a package are not configured for Auto Fulfill, then the entire Package must be manually fulfilled.

Require shoppers to respond to CAPTCHA before the product can be placed in their cart?

When Yes is selected, the shopper will see a CAPTCHA challenge prompt when they attempt to add the package to their shopping cart. The shopper

must enter the code before they can continue. This field can be used to help prevent Internet bots from being used to purchase products, as bots cannot typically interpret CAPTCHA codes. Use of this field may be particularly relevant for a package in which the demand may be high and the inventory supply limited.

Payment Method Settings

Allowed Payment Methods:

<input type="checkbox"/> AmEx
<input type="checkbox"/> Discover
<input type="checkbox"/> INTERAC
<input checked="" type="checkbox"/> MasterCard
<input checked="" type="checkbox"/> Visa
<input checked="" type="checkbox"/> webCheck

Days fulfiller must wait before fulfilling orders paid via ACH:

Product Image Management for Stores

Best results is using an image with the recommended W x H: 250 x 250 pixels



Best results is using an image with the recommended W x H: 80 x 80 pixels



The Checkout and Product options on the Product Settings page.

Payment Method Settings

Allowed Payment Methods

Choose allowed payment methods for this package by selecting the corresponding checkbox for each payment method that will be allowed. For more information about payment methods, see ["Notes on Payment Methods" on page 209](#).

These payment methods are completely separate from the payment methods configured for each product. For example, a product might be configured to use American Express, Visa, and MasterCard. However, once this product is included in a package, a completely different set of allowed payment methods may be chosen. In this case, the package might use Discover Card, Visa, and ACH.

Days fulfiller must wait before fulfilling orders paid via ACH

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.

Product Image Management for Stores

Image Management with packages works the same as it does with products. For information about Image Management functionality, see ["Image Management" on page 310](#).

Managing Related Products

After products have been related by using the Products page (as described in ["Creating Related Product Groups" on page 281](#)), you can maintain these products groups by using the Related Item Groups page. To get to this page, you must first navigate to the Products page: To open the Products page, the store manager or merchant manager navigates to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products. Once the Products page appears, select the Related Items button near the top of the page. The Related Item Groups page then appears.

Name	Section Heading	Description	
drafting items	You may also like ...		
writing items	You may also like ...		

The Related Item Groups pages lists the groups that have been created.

For each related item group listed on this page, the Name, Section Heading, and Description is displayed. (This information was entered when the related item group was created.) If you select a related item group name, a table appears and this table lists all the products in the group and includes information for each of these products, such as product type, items for sale, quantity in stock, store category assignments, and the availability status.

Architectural Supplies Related Item Groups Print Page 

Settings on this page manage related item groups. Click on a group name to view related items.

[Back to Products Page](#)

Related Item Groups

Name	Section Heading	Description					
drafting items	You may also like ...						
Related Items for drafting items							
Name	Type	Items for Sale	Quantity	Store Category	Web	Mobile	Point of Sale
<input type="checkbox"/> Dusting Brush	Generic	1	Not Tracked	Drawing Equipment	Enabled	Enabled	Disabled
<input type="checkbox"/> Lettering Guide	Generic	1	Not Tracked	Pens	Enabled	Enabled	Disabled
<input type="checkbox"/> Adjustable Triangle	Generic	1	Not Tracked	Drawing Equipment	Enabled	Enabled	Disabled
<input type="checkbox"/> Lead Holder	Generic	3	Varies by Item for Sale	Pencils	Enabled	Enabled	Disabled
<input type="checkbox"/> French Curve	Generic	1	Not Tracked	Drawing Equipment	Enabled	Enabled	Disabled
writing items	You may also like ...						

By clicking a related item group name, a list of all products in that group appears.

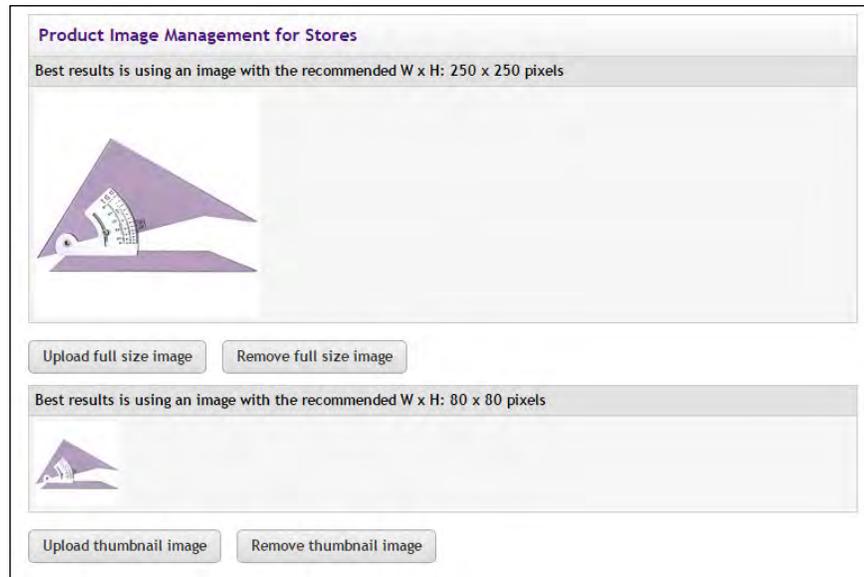
Once you have clicked a related item group name and displayed the products in the group, you can click on a product name to open the Product Settings page for that product.

In addition, the following functionality for managing a related item group is available from the Related Item Groups page via the Gear icon in the far right column:

- **Edit Group**—When you choose Edit Group, a window appears that allows you to edit the Group Name, Section Heading, and Group Description. (These fields are defined in "**Creating Related Product Groups**" on page 281.)
- **Remove Group**—If you choose this option, the related item group will be removed. The products will still exist, but they will no longer be related.
- **Add Items**—If you choose this option, a window will appear that lists all the products for this store that are not part of the selected "related item group." To add products to this group, choose the checkbox for each product that you would like to add to the group and then select the Save button.
- **Remove Items**—To remove products from a related item group, first click the group name so that all the related items are displayed. Then choose the checkbox for each product that you would like to remove from the group and select Remove Items from the Gear flyout menu.

Image Management

Product images are managed on the Product Details page for each product.



The Image Management section of the Product Details page.

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.

Important! It is your responsibility to ensure that you have all necessary rights for the images you upload. Images that you did not create (such as images on other web sites) are typically protected by copyright law and should not be uploaded for use in Marketplace unless you have received permission from the copyright holder.

Modifiers Management

Product modifiers are managed on the Manage Modifiers page for each product.

Writers Symposium: Manage Modifiers

Add, edit or remove modifiers. Sort key controls display order.

[Back To Product Settings](#)

Add Modifier

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

Add Modifier Group

Type	Example
Table Builder	Example

Modifiers

Name	Sort Key	Type	Frequency	Format What is this?	Actions
Handbook	<input type="text" value="1"/>	Required Selection	Static	N/A	Edit Remove
Sessions (Please select all desired)	<input type="text" value="2"/>	Optional MultiSelect Checkbox	Static	N/A	Edit Remove
Attendee Name	<input type="text" value="3"/>	Optional Text Entry	Static	Free Text Minimum: 0 Maximum: 20	Edit Remove
Attendee E-mail Address	<input type="text" value="4"/>	Optional Text Entry	Static	Free Text Minimum: 0 Maximum: 20	Edit Remove
Address	<input type="text" value="5"/>	Optional Text Entry	Static	Free Text Minimum: 0 Maximum: 60	Edit Remove
City	<input type="text" value="6"/>	Optional Text Entry	Static	Free Text Minimum: 0 Maximum: 40	Edit Remove
State (Two-letter abbreviation)	<input type="text" value="7"/>	Optional Text Entry	Static	Free Text Minimum: 0 Maximum: 2	Edit Remove
Zip Code	<input type="text" value="8"/>	Optional Text Entry	Static	Free Text Minimum: 0 Maximum: 10	Edit Remove
May we include your name on a public guest list?	<input type="checkbox"/>	Required Selection	Static	N/A	Edit Remove

[Save Sort](#)

The Category Assignments section of the Product Details page.

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.

The Manage Modifiers page consists of three sections:

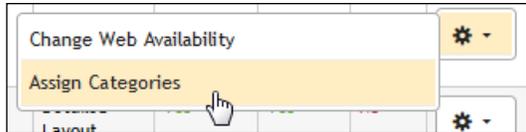
- **Add Modifier**—The top section is named Add Modifier, and it lists the three types of modifiers that can be added to products: Required Selection, Text Entry, and Optional Multiple Select Checkboxes. To add a modifier, click the name of the modifier that you would like to add. For more information about how to add a modifier, see ["Using Product Modifiers" on page 330](#).

- **Add Modifier Group**—The next section is named Add Modifier Group, and it lists modifiers that have been grouped to allow for easier entry when multiple items are ordered. These modifiers are displayed in a table to shoppers, and accordingly the Marketplace mechanism for grouping the modifiers is called "Table Builder." To add a modifier group, click the Table Builder text link.
- **Modifiers**—The third section is named Modifiers, and it lists all the modifiers that have been created. For each modifier, the modifier type is listed in the Type column. If the "Table Builder" has been used to group modifiers, the description "Table Builder" appears in the Type column and the modifiers in the group appear in a sub-table following the "Table Builder" entry. To edit an existing modifier: click the Edit link of the corresponding modifier. To remove an existing modifier: click the Remove link of the corresponding modifier. For more information about editing product modifiers, see ["Using Product Modifiers" on page 330](#)

Note: 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 Sort 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.

Managing Category Assignments

To assign a product to categories (or to remove a product from categories), follow these steps:

- 1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products. The [Store Name] Products page appears.
- 2 Identify the product that you would like to edit and click gear icon's down arrow. A flyout menu will appear.
 
 A screenshot of a flyout menu from a web application. The menu is open, showing two options: 'Change Web Availability' and 'Assign Categories'. The 'Assign Categories' option is highlighted in yellow, and a mouse cursor is pointing at it. The menu is part of a larger interface with a table-like structure.
- 3 Select Assign Categories from the flyout menu. The Manage Category Assignments page appears.

Mall Category Assignments

	0 items selected
Add all	Remove all
Alumni +	
Clothing +	
Events +	
Services +	

Store Category Assignments

	0 items selected
Add all	Remove all
(Store Home Page) +	
(No category - only orderable via direct link) +	
(No category - not orderable) +	
Clothing +	
Events +	

The Manage Category Assignments page.

- 4 Click the + [plus] sign in the left column for each category you would like to add. If you would like to remove any category assignments, click the - [minus] sign in the right column for each corresponding category.

Three categories are built into Marketplace and are available for use with store category assignments:

- **Store Home Page**—This category can be used with stores that use Default (Top Level Products and Categories) as the Store Home Page Layout. (This option is on the Store General Settings page.) When the Default layout is used, products in the "Store Home Page" category

will be displayed on the store's home page. If the Splash (Top Level Categories and Splash Image) layout is used, the products in the "Store Home Page" category are not displayed on the home page, but the products can be ordered via a direct link to the product detail page.

- **No category - only orderable via direct link**—Products in this category do not appear on either the store home page or store category pages. However, customers can navigate to the product detail page via a direct URL. Customers who navigate to the product can order the product.
- **No category - not orderable**—Products in this category do not appear on either the store home page or store category pages. In addition, the product is not available via a direct URL and cannot be ordered.

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 Products page.
- 2 Click the product name text link in the Name column. The Product Settings page appears.
- 3 Click the Manage Status link in the Web Status row of the General Settings section. The Manage Status page appears.
- 4 Click the Delete link in the Action column.
- 5 A dialog appears in which you must confirm deletion of the product. Click the Yes button.

Note: When a product is deleted, its order history remains in the Marketplace database so that the product will appear in reports.

Important! Be careful that you do not delete products with outstanding orders that require fulfillment.

You can also delete one or more products at the same time by using the Products page. To delete one product using the Products page:

- 1 Open the Products page.
- 2 For the product that you would like to delete, place the cursor over the Gear icon in the far right column. The action flyout menu appears.
- 3 Choose Delete Product.
- 4 When the confirmation pop-up message appears, choose OK to confirm deletion of the product.

To delete multiple products at the same time while using the Products page:

- 1 Open the Products page.

- 2 For the products that you would like to delete, select these products by choosing the checkbox for each product in the left column
- 3 Then place the cursor over the Gear icon in the column header of the far right column. The action flyout menu appears.
- 4 Choose Delete Products.
- 5 When the confirmation pop-up message appears, choose OK to confirm deletion of the products.

5.7 Using Product Options

Some products need to be available with options such as size or color. You can make these options available to shoppers by adding product "options" either when you create a product or by editing an established product.

Here is an example of how product options work with Marketplace. Let's say you decide that a campus sweatshirt needs to be available in four sizes. You would also like the shirt to be available in two colors. In this case, you would set up a size option for this product and enter the size values (such as, S, M, L, and XL). You would also set up a color option and enter the color values (such as, gray and white). As a result, in this example, eight different inventory items will be generated, as shown in the following table:

Sample Options Table

	gray	white
S	S: gray	S: white
M	M: gray	M: white
L	L: gray	L: white
XL	XL: gray	XL: white

In this table, each cell with a white background represents a different combination of product options. Marketplace refers to each different combinations of options as an "item for sale." Each "item for sale" will be represented by a separate inventory stock and a corresponding separate stock number. In addition, Marketplace allows you to set up a different price for each item for sale. For example, a small, gray shirt might cost \$15 and an extra-large, white shirt might cost \$20.

Note: Remember that the use of product "options" generates new inventory "items for sale," while the use of product "modifiers" does not. A product modifier adds features to an existing product, but the inventory item remains the same. For more about product modifiers, see ["Using Product Modifiers" on page 330](#).

Adding Product Options

Follow these steps to add product options.

- 1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products. The Store Products page appears.
- 2 Click the product name text link in the Name column. The Product Settings page appears.

The General Settings section of this page looks like this:

Union Event: Product Settings

Settings on this page configure the product.

Print Page

[Back To Products](#)

General Settings

Id:	28
Type:	Generic
Name: (200 chars max)	<input type="text" value="Union Event"/>
Items for Sale (1):	View Add Options
Modifiers:	Manage Modifiers
Web status:	ENABLED Manage status

If no options have been configured, the "Add options" link appears.

If no options have been added to the product, the Add Options link will appear in the "Items for Sale" row of the General Settings section.

If options have already been created, the "Manage Options" link appears instead. See **"Modifying Product Options" on page 321** for more information managing existing product options.

- 3 Click the "Add options" link.

The Add Options page appears with fields for entering one new product option.

Union Donation: Add Options

Add options and values associated with a product. Items for Sale are combined option and values.

Print Page

Back To Products
Back to Product Settings

Options and Values

Please enter new options and values.

Option Name (examples: Size or Color)	Option Values (examples: Small and Large or Blue and White)
<input style="width: 90%;" type="text"/> Remove Option	<input style="width: 90%;" type="text"/> <input style="width: 90%;" type="text"/> More Values

More Options
Continue
Cancel

- 4 Enter a name for the option in the Option Name field.
 "Size" and "Color" are examples of "options." Additional examples: height, weight, volume, and sleeve length. Digital products might use options such as file size or file format.
 If you need to add more options, click the More Options button.
- 5 Enter option values in the Option Values fields.
 For example, with an option of "Size," you might have the option values of "Small" and "Large." With an option of "Color," you might have the option values of "Blue" and "White."
 Only enter one option value per text box.
 By default, you are given two Option Values fields. If you would like to enter more than two option values, select the "More Values" text link below the Option Values fields. Each time you select the More Values text link, you are given one more field for entering an option value. So continue to select the More Values text link until the desired quantity of fields is available.
- 6 If you need to add more options, click the More Options button. Each time you click the More Options button, another row appears for entering an Option Name, as well as two Option Value fields.
Note: If you clicked the More Options button but then decided to not use that option, click the Remove Option text link. You cannot continue to the next step with an empty Option Name field.
- 7 Click the Continue button.
 The Modifier and Stock Number Settings page appears.

Library Fund: Modifier and Stock Number Settings

Stock Number can be assigned or a new number can be used for the newly created Items for Sale. Items for Sale are combined option and values.

Back To Products

Modifier and Stock Number

Option: Color

With confirmation of option changes, modifiers should be verified for Items for Sale. Modifiers can be managed from Product Settings.

Stock Number:

Assign New Number
 Keep Existing Number

Cancel

Continue

8 Choose either Assign New Number or Keep Existing Number.

This page exists so that you can specify the fate of the original stock number for this product. Because you are adding options to the product, additional stock numbers will need to be generated. For example, originally the product might have been a white polo shirt. It was assigned the stock number 123456. Now you have set up an option so that the polo shirt can be offered in two three sizes: small, medium, and large—and these items will use different stock numbers. When you add the option for size, Marketplace needs to know what to do with the original stock number. If you would like to continue using the existing stock number, you will need to identify which option value (in this example, small, medium, or large) should be associated with the original stock number. A new stock number will need to be assigned to the other option values.

Alternately, you can stop using the existing stock number and assign new stock numbers by selecting the "Assign New Number" radio button.

9 Click the Continue button.

The Item for Sale Settings page appears.

White Polo: Item for Sale Settings

Edit settings for Item for Sale

Back To View Items for Sale

Item for Sale Settings

Item for Sale 1 of 8	Id
Medium: white	Set with confirmation

Settings

Price:

Stock Number (Maximum characters 30):

Check if stock number is already assigned

Assign Random Number

Limit Quantity: Yes, Maximum Per Order:

No

Track Inventory: Yes, Initial Inventory:

No

Back Orderable: Yes

No

Auto Fulfill: Yes

No

Cancel
Continue

- 10** You will need to complete this page for each option value. For example, if you set up an option for "Size" and you entered the values of Small, Medium, and Large, you would complete the Item for Sale Settings page three times.

Note: If you added multiple Option Names, you will need to complete this page for all the combinations of option values. For example, let's say you added two option names, such as "Size" and "Color." For size, you entered the option values of Small, Medium, and Large. For color, you entered the option values of Blue and White. You will now have six "items for sale"—small | white, medium | white, large | white, small | blue, medium | blue, and large | blue—and therefore you will need to complete the Items of Sale Settings page six times.

You must complete the following fields on this 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 this page overrides the price that you entered on Step 1.
- **Stock #**—You must enter a stock number. This number can be a UPC number or any other number of value to your store or organization. Click the Assign Random Number button to have Marketplace automatically assign a stock number. 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 assigned" checkbox.

- **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.

- **Item for Sale is not available**—If an option combination (an "Item for Sale") is not valid for your store, or if a combination is not currently available, you can use this checkbox to disable the "Item for Sale." For example, a small *blue* sweatshirt IS available but a small *white* sweatshirt is NOT.

Note: By completing this page separately for each product option (or combination of options), you can set up different prices and inventory for each option (or combination of options). The "Item for Sale" column describes which option (or option combination) you are currently working on.

- 11 Click the Continue button when you are finished. You'll be asked to confirm the addition of the options.

Modifying Product Options

Follow these steps to modify product options.

- 1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products. The Store Products page appears.
- 2 Click the product name text link in the Name column. The Product Settings page appears.

General Settings	
Product Type:	Generic
Product Name: (200 chars max)	Clincher Softball
Items for Sale (3):	View Manage Options
Modifiers:	Add Modifier
Store status:	ENABLED Manage status
Mobile status:	ENABLED Manage status

If options have been configured, the "Manage Options" link appears.

The "Items for Sale" row lists the available actions. The available actions (when options have been configured) include "View" and "Manage Options." (If the "Add Options" link appears instead of "Manage Options," no options have been added to the product yet. See **"Adding Product Options" on page 316** for more information.)

- 3 Click the "Manage Options" link.

The Manage Options page appears.

Clincher Softball: Manage Options	
Manage options and values associated with a product	
Back To Products View Items For Sale	
Options	
Color white, orange, yellow	Edit Option Delete Option
Cancel Add Option	

- 4 The currently configured options will be listed in the Options table. You can take the following actions:
 - Click the Edit Option link to edit the corresponding option name and its values.
 - Click the Delete Option link to delete the corresponding option.
 - Click the Add Option button to add a new option and enter its values.

The following steps focus upon clicking the Edit Option link. If you would like to add options, see "Adding Product Options" above in this same topic. When you click the Edit Options link, the Edit Option page appears.

Clincher Softball:Edit Option

Option and values associated with the product. Items for Sale are combined option and values.

[Back To Products](#)

Option

Color	white	Delete Value
	orange	Delete Value
	yellow	Delete Value

[Add Value](#) [Continue](#) [Cancel](#)

- 5 The Edit Option page allows you to modify the name of the selected option and the names of any existing option values. You can take the following actions on this page:
 - Click the Continue button to save any modifications you may have entered.
 - Click the Delete Value link to deleted the corresponding option value.
 - Click the Add Value button to add a text box for entering another option value. After you enter the value name you can continue adding more option values, or you can click the Continue button if you are done.

The following steps will focus on what happens after you click the Continue button. The Item for Sale Settings page appears.

Clincher Softball: Item for Sale Settings

Edit settings for Item for Sale

[Back To View Items for Sale](#)

Item for Sale Settings

Item for Sale 1 of 1	Id
pink	Set with confirmation

Settings

Price:	<input type="text" value="\$ 0.00"/>
Stock Number (Maximum characters 30):	<input type="text"/>
<input checked="" type="checkbox"/> Check if stock number is already assigned	
Assign Random Number	
Limit Quantity:	<input type="radio"/> Yes, Maximum Per Order: <input type="text"/> <input checked="" type="radio"/> No
Track Inventory:	<input type="radio"/> Yes, Initial Inventory: <input type="text"/> <input checked="" type="radio"/> No
Back Orderable:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Auto Fulfill:	<input type="radio"/> Yes <input checked="" type="radio"/> No

[Confirm](#) [Cancel](#)

- 6 You will need to complete this page for each new set of options (or for each new combination of options). For example, if a product had an option for "Size" with the values of small, medium, and large and you added "extra large" as a Size, then you would complete the Item for Sale page for just the one resulting new Item for Sale.

For the new Item for Sale, you must complete the following fields on this page:

- **Price**—You must enter a price for the new Item for Sale.
- **Stock #**—You must enter a stock number. This number can be a UPC number or any other number of value to your store or organization. Click the Assign Random Number button to have Marketplace automatically assign a stock number. 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 assigned" checkbox.
- **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.

- **Item for Sale is not available**—If an option combination (an "Item for Sale") is not valid for your store, or if a combination is not currently available, you can use this checkbox to disable the "Item for Sale." For example, a small *blue* sweatshirt IS available but a small *white* sweatshirt is NOT.
- 7 Click the Confirm button when you are finished. You'll be asked to confirm the addition of the options.

Viewing and Modifying 'Items for Sale'

Once product options have been added to a product—and "Items for Sale" have been generated—you can view and modify an "Item for Sale" by following these steps.

- 1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products. The Store Products page appears.
- 2 Click the product name text link in the Name column. The Product Settings page appears.

General Settings	
Product Type:	Generic
Product Name: (200 chars max)	Clincher Softball
Items for Sale (3):	View Manage Options
Modifiers:	Add Modifier
Store status:	ENABLED Manage status
Mobile status:	ENABLED Manage status

If options have been configured, the "Manage Options" link appears.

The "Items for Sale" line lists the available actions. The available actions (when options have been configured) include "View" and "Manage Options."

3 Click the "View" link.

The "View Items for Sale" page appears.

Print Page 

Clincher Softball: View Items for Sale

Update status or select to edit inventory and pricing information.

Back To Products
Back to Product Settings
Manage Options

Items for Sale								
<input type="checkbox"/>	Item for Sale	Price	Stock Number	Quantity	Web	Mobile	Point of Sale	
<input type="checkbox"/>	white	\$12.00	6536750	Not Tracked	ENABLED	ENABLED	DISABLED	
<input type="checkbox"/>	orange	\$14.00	2807784_1	Not Tracked	ENABLED	ENABLED	DISABLED	
<input type="checkbox"/>	yellow	\$14.00	2807784_2	Not Tracked	ENABLED	ENABLED	DISABLED	
<input type="checkbox"/>	pink	\$0.00	3776448	Not Tracked	ENABLED	ENABLED	DISABLED	

The Product Options page lists all the "Items for Sale" configured for a product.

This page lists all the "Items for Sale" configured for the product. For each "Item for Sale," it shows price, stock #, quantity, and the enabled/disabled status. (You can also use this page to schedule price changes for each "Item for Sale." See **"Scheduling Price Changes for 'Items for Sale'"** on page 327.)

The name of the "Item for Sale" will represent the option combinations. For example, if only one option has been set up and this option is Color, then the Item for Sale column will show all the colors (option values) that have been established. If two options have been set up—Color and Size—then the Item for Sale column will show all the possible combinations of these two options. For example, if Color has the values of white and yellow and Size has the values of youth and league, then four Items for Sale will result: 1) white:youth, 2) white:league, 3) yellow:youth, and 4) yellow:league.

- 4 To view/edit an "Item for Sale," select the corresponding name for the "Item for Sale."

The Edit Settings page then appears for the selected Item for Sale. This page lists the price, stock number, and other options.

blue: Edit Settings Print Page 

Edit settings for the Item for Sale.

[Back To Items For Sale](#)

Item for Sale Settings

Item for Sale	Id
blue	93
Price is in USD (\$)	
Price:	<input type="text" value="8.00"/>
Stock Number (Maximum characters 30):	<input type="text" value="5006503"/>
Barcode Number:	10000000093
Limit Quantity:	<input type="radio"/> Yes, Maximum Per Order: <input type="text"/> <input checked="" type="radio"/> No
Track Inventory:	<input checked="" type="radio"/> Yes, Initial Inventory: <input type="text" value="56"/> <input type="radio"/> No
Out of Stock Message (This message will appear if the item goes out of stock): (500 chars max) (HTML Allowed)	<div style="border: 1px solid #ccc; height: 30px;"></div>
Back Orderable:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Auto Fulfill:	<input type="radio"/> Yes <input checked="" type="radio"/> No

[Cancel](#) [Save](#)

The Edit Settings page contains inventory and price fields.

- 5 You can edit the following fields on this page:
- **Price**—You can modify the price.
 - **Stock #**—You can modify the stock number. The number can be a UPC number or any other number of value to your store or organization.
 - **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.

- 6 Click the Save button when you are finished. You'll be asked to confirm the addition of the options.

Scheduling Price Changes for 'Items for Sale'

Once product options have been added to a product—and "Items for Sale" have been generated—you can schedule price changes for an "Item for Sale" by following these steps.

- 1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products. The Store Products page appears.
- 2 Click the product name text link in the Name column. The Product Settings page appears.

General Settings	
Product Type:	Generic
Product Name: (200 chars max)	<input type="text" value="Clincher Softball"/>
Items for Sale (3):	View Manage Options
Modifiers:	Add Modifier
Store status:	ENABLED Manage status
Mobile status:	ENABLED Manage status

If options have been configured, the "Manage Options" link appears.

The "Items for Sale" line lists the available actions. The available actions (when options have been configured) include "View" and "Manage Options."

- 3 Click the "View" link.

The "View Items for Sale" page appears.

<input type="checkbox"/>	Item for Sale	Price	Stock Number	Quantity	Web	Mobile	Point of Sale	⚙️
<input type="checkbox"/>	white	\$12.00	6536750	Not Tracked	ENABLED	ENABLED	DISABLED	⚙️
<input type="checkbox"/>	orange	\$14.00	2807784_1	Not Tracked	ENABLED	ENABLED	DISABLED	⚙️
<input type="checkbox"/>	yellow	\$14.00	2807784_2	Not Tracked	ENABLED	ENABLED	DISABLED	⚙️
<input type="checkbox"/>	pink	\$0.00	3776448	Not Tracked	ENABLED	ENABLED	DISABLED	⚙️

The Product Options page lists all the "Items for Sale" configured for a product.

This page lists all the "Items for Sale" configured for the product. You can use this page to schedule price updates.

- 4 Select one or more "Item for Sale" checkboxes in the far left column.
- 5 Move your mouse pointer over the Gear icon in the far right column header. The Gear flyout menu will appear. Select "Schedule Price Changes" from the menu.

Note: You can also schedule a price update for a single Item for Sale by using the Gear icon that is in the same row as the Item for Sale.

<input checked="" type="checkbox"/>	Item for Sale	Price	Stock Number	Quantity	Web	Mobile	Point of Sale	⚙️
<input checked="" type="checkbox"/>	white	\$12.00	6536750	Not Tracked	ENABLED	ENABLED	DISABLED	⚙️
<input checked="" type="checkbox"/>	orange	\$14.00	2807784_1	Not Tracked	ENABLED	ENABLED	DISABLED	⚙️
<input checked="" type="checkbox"/>	yellow	\$14.00	2807784_2	Not Tracked	ENABLED	ENABLED	DISABLED	⚙️
<input checked="" type="checkbox"/>	pink	\$13.00	3776448	Not Tracked	ENABLED	ENABLED	DISABLED	⚙️

The Gear flyout menu in the column heading includes options for product availability.

When you select Schedule Price Changes from the Gear flyout menu, the Schedule Price Update page appears.

Schedule Price Update Print Page

Settings on this page manage updating and scheduling product price changes. If you do not want to change the price for a product listed, leave the New Price field blank.

Back To Products
Back To Product Settings

Schedule Price Update

24-hour (example: 00 for Midnight) Store Time Zone: Greenwich Mean Time	Update Price Date: <input style="width: 80%;" type="text"/>  Update Price Hour: <input style="width: 80%;" type="text"/>
--	--

Items for Sale	Current Price	New Price
Clincher Softball		
white	\$12.00	<input style="width: 90%;" type="text"/>
orange	\$14.00	<input style="width: 90%;" type="text"/>
yellow	\$14.00	<input style="width: 90%;" type="text"/>
pink	\$13.00	<input style="width: 90%;" type="text"/>

Save Schedule

Scheduled Price Updates

No Scheduled Price Updates

Scheduled Price History

No Scheduled Price History

The Schedule Price Update allows you to set a date and hour for the price change.

- 6 Enter a date in the Update Price Date field or select a date using the calendar wizard. If you enter a date, be sure to enter the date in this format: mm/dd/yy.
- 7 Select an hour from the Update Price Hour drop-down list. Hours are listed by the 24-hour clock (also known as military time). So 3 p.m. appears as 15 and 11 p.m. appears as 23.

Enter the new price for each item displayed in the Items for Sale table. Then select the Save Schedule button.

The price change then appears in the Schedule Price Updates table.

Note: You can determine if a price change has already been scheduled for any of the products that you selected by using the Schedule Price Updates table. You can delete a scheduled price update by selecting the Delete link in the Action column.

5.8 Using Product Modifiers

A product "modifier" asks the customer for additional information about their order. For example, a modifier could be used to add a monogram to a shirt (the shirt is the product and the monogram is a modifier), or a modifier could be used to collect a lunch preference or a conference session selection when a shopper is registering for a conference (the conference registration is the product and the lunch preference and the session selection are modifiers). The modifier 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 the product by adding one or more modifiers. Marketplace provides three types of modifiers:

- **Drop-down Selection**—The shopper is asked to make a selection from a drop-down list before they add the product to their shopping cart. For example, if the product is a conference registration, the shopper might be required to select a lunch preference. A selection from the drop-down list can be required or optional. A separate price adjustment can be entered for each dropdown selection.
- **Multiple Select Checkboxes**—The shopper is asked to choose from multiple checkbox options. This response is not required. For example, the shopper might be able to add ingredients to a pizza by selecting these checkboxes. They can choose as many or as few of the options as they prefer. A separate price adjustment can be entered for each checkbox selection.
- **Text Entry**—The shopper is asked to enter a text response to a prompt. For example, if the product is a shirt, the shopper could use this field to enter the monogram that they would like to appear on a shirt. This response can be either required or optional. A price adjustment can be triggered if the customer makes an entry in the text field.

All three types of modifiers have a **frequency** option. This option comes into play when the customer orders the product and selects a quantity of two or more. If you select "**Static**" as the frequency, uStores will display the modifier field only once regardless of the quantity ordered. In contrast, if you select "**Dynamic**" as the frequency, uStores will repeat the modifier field for each quantity ordered. For example, if the product is an event registration, the customer might register multiple people to attend the event. You can use the Dynamic frequency option to repeat the modifier prompt and ask for a name and contact information (or any other information you desire) for each registrant. (For examples of how modifiers are displayed in uStores, see "[What the Customer Sees](#)" on page 332.)

Marketplace also provides a way for managing multiple modifiers: **Table Builder** organizes modifiers into a table format, making it more convenient for customers to enter information for multiple modifiers during the uStores

checkout process. Each column of the table represents a product modifier that is set up and controlled independently from the table. Table Builder works especially well with modifiers that use the frequency type of "dynamic." For more about Table Builder, see ["Using the Table Builder" on page 341](#).

In addition, Marketplace provides a means for linking modifiers so that the display of a modifier can be configured to depend upon the shopper's answer to a previous modifier. Marketplace calls these modifiers **"linked modifiers."** For more about linked modifiers, see ["Using Linked Modifiers" on page 344](#).

Important! Marketplace does not encrypt product modifier data in storage or mask this data in reports. Therefore, sensitive material should not be collected using the product modifier fields. For example, collecting Social Security Numbers with a product modifier field would increase the risk of the misuse of this information (i.e., identity theft).

Modifiers vs. Options

Product "modifiers" and product "options" are very different. It is important that store managers and clerks understand the difference.

An "option" is a factor such as size or color that changes a product's stock number. For instance, you might offer a shirt in two colors (white and gray) and four sizes (small, medium, large, and extra large). Instead of adding eight separate products (white small, white medium, white large, white extra large, gray small, gray medium, gray large, and gray extra large), you enter the shirt as one product with an option for color and an option for size. And you enter two values for color and four values for size. As a result, when a shopper orders a shirt, they must choose a color from the Color dropdown list and a size from the Size dropdown list. The eight option combinations are eight separate stock items. Marketplace refers to each option combination as an "item for sale."

In contrast, when you add a "modifier" to a product, you are NOT changing the base product, but you ARE capturing an additional piece of information regarding the order.

Examples of products with modifiers:

Product	Modifier (and modifier type)
gold ring	engraving (text entry)
shirt	monogram (text entry)
seminar	lunch selection: chicken sandwich, salad, & none (required selection)
seminar	extras: tote bag, pen, & CD (optional multiple select checkbox)
seminar	attendee name (text entry)

Product	Modifier (and modifier type)
pizza	toppings: pepperoni, sausage, black olives, & green peppers (optional multiple select checkbox)

In all of these modifier examples, the base product remains the same. The modifiers are used to collect additional information. In some cases, the collected data provides information about how the product should be customized for the customer, such as the engraving on the gold ring or the toppings on the pizza. In other cases, the collected data is strictly informational and doesn't cause any customization of the product, such as the attendee name for the seminar.

And here are examples of products with options:

Product	Options
gold ring	ring size (6, 6.5, 7, 7.5, 8, 8.5, 9, 9.5, 10, & 10.5)
sweatshirt	size (medium, large, & extra large) and color (black & white)
dress shirt	sleeve length (short & long)
seminar	day (Monday & Tuesday) and time (9 a.m. & 2 p.m.)
pizza	size (9", 12", & 15")

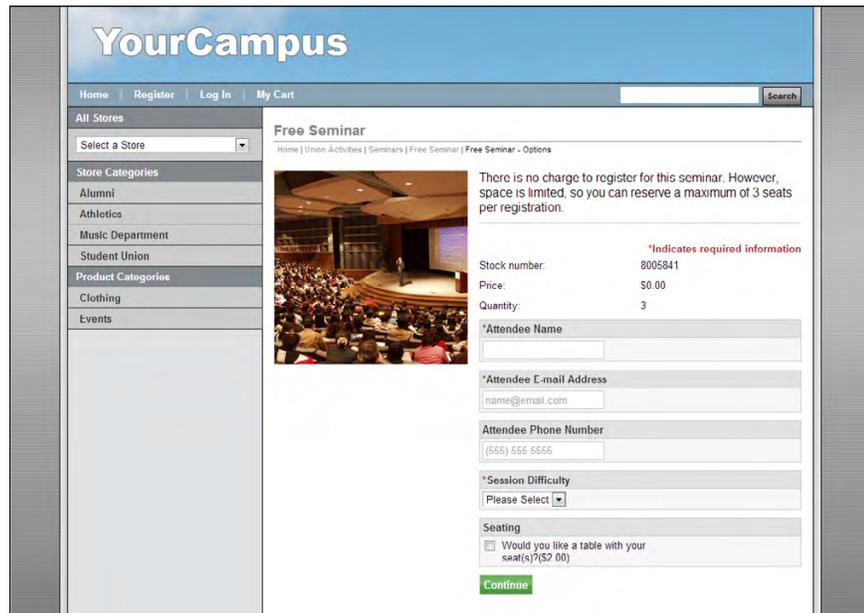
These options require different inventory items ("items for sale"). For more about options, see ["Using Product Options" on page 315](#).

What the Customer Sees

Here are examples of uStores pages that customers will see when they attempt to add a product to their shopping cart and the product is configured with modifiers. In these examples, the product uses a total of five modifiers. The first three modifiers (Attendee Name, Attendee E-mail Address, and Attendee Phone Number) are "Text Entry" modifiers. The fourth modifier (Session Difficulty) is a "Required Selection" modifier. And the final modifier (Seating) is an "Optional Multiple Select Checkboxes" modifier. In these examples, the customer is ordering a quantity of 3.

Example 1

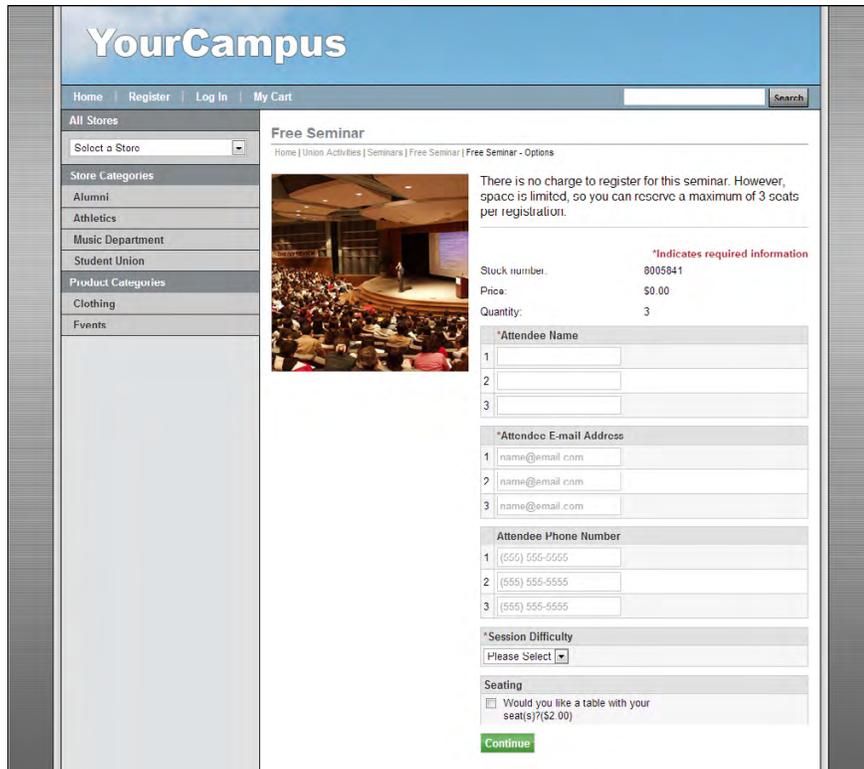
In the first example, all five modifiers are configured with the frequency of "static," so each modifier appears just once, regardless of the quantity ordered.



The screenshot displays the 'YourCampus' website interface. The main navigation bar includes links for Home, Register, Log In, and My Cart, along with a search box. A left sidebar lists 'All Stores' and 'Store Categories' such as Alumni, Athletics, Music Department, Student Union, and Events. The main content area is titled 'Free Seminar' and features a breadcrumb trail: Home | Union Activities | Seminars | Free Seminar | Free Seminar - Options. A photograph of a seminar is shown on the left. To the right, a message states: 'There is no charge to register for this seminar. However, space is limited, so you can reserve a maximum of 3 seats per registration.' Below this, product details are listed: Stock number: 8005841, Price: \$0.00, and Quantity: 3. A red asterisk indicates required information. The registration form includes fields for: *Attendee Name, *Attendee E-mail Address (with a placeholder 'name@email.com'), Attendee Phone Number (with a placeholder '(555) 555 5555'), *Session Difficulty (with a dropdown menu), and Seating (with a checkbox 'Would you like a table with your seat(s)? (\$2.00)'). A green 'Continue' button is located at the bottom of the form.

Example 2

In the second example, the first three modifiers (Attendee Name, Attendee E-mail Address, and Attendee Phone Number) are configured with the frequency of "dynamic," so the customer will need to enter this information three times (because the order quantity is 3). The final two modifiers (Session Difficulty and Seating) are configured with the frequency of "static," so these modifiers only ask for one value each.



Example 3

And in the third example, Table Builder has been used to organize the presentation of modifiers into a modal window so that the maximum amount of horizontal real estate in the web browser window becomes available for the display of the modifiers. Notice how the modifiers for Attendee Name, Attendee E-mail Address, and Attendee Phone Number have been grouped in a table. Each line of the table represents an attendee. The attendee modifiers all use the frequency of "dynamic." The final two modifiers (Session Difficulty and Seating) are part of the Table Builder group, but because these modifiers were configured with the frequency of "static," these modifiers only ask for one value each (not three). Table Builder works especially well when customers are ordering multiple quantities of the same product, as typically happens, for example, with event registrations.

The screenshot shows the 'YourCampus' website interface. A modal window titled 'Free Seminar' is open, displaying product details and a table for adding attendees. The product details include Stock number (8005841), Price (\$0.00), and Quantity (3). The attendees table has three rows, each with fields for Attendee Name, Attendee E-mail Address, and Attendee Phone Number. Below the table are sections for Session Difficulty (Please Select) and Seating (Would you like a table with your seat(s)?(\$2.00)). A 'Continue' button is at the bottom of the modal. The website footer includes navigation links like Site info, Shipping Rates, Return Policy, Privacy Policy, Help, Accessibility, and Contact Us, along with copyright information for TouchNet Information Systems, Inc. and a 'TouchNet Secured Site' logo.

Adding a Product Modifier

Follow these steps to add a product modifier.

- 1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products. The Store Products page appears.
- 2 Click the product name link. The Product Settings page appears.
- 3 In the General Settings section at the top of the page, click the "Add Modifier" link. The Manage Modifiers page appears.

Note: If modifiers have already been configured for the product, the Modifiers line in the General Settings section, will instead have a link named "Manage Modifiers." For more about editing existing modifiers, see ["Editing a Product Modifier" on page 343](#).

Dusting Brush: Manage Modifiers Print Page 

Add, edit or remove modifiers. Sort key controls display order.

[Back To Products](#) [Back To Product Settings](#)

Add Modifier

Type	Example
Drop-down Selection	Example Optional Example Required
Text Entry	Example Optional Example Required
Multiple Select Checkboxes	Example Optional Example Required

Add Modifier Group

Type	Example
Table Builder	Example

Modifiers

Name	Sort Key	Type	Frequency	Format What is this?	Actions
Modifiers applied to this Product: None					

- 4 The modifier types appear as text links in the Add Modifier section. Click the type of modifier that you want to add. The Add Product Modifier page then appears for the modifier type that you selected.
- 5 Enter the modifier information as described in **"Using the Add/Edit Product Modifier Pages" on page 336.**

Using the Add/Edit Product Modifier Pages

Three types of product modifier pages are available: 1) drop-down selection, 2) optional multiple select checkboxes, and 3) text entry. When you add a product modifier, you select a modifier type (as described in **"Adding a Product Modifier" on page 335**) and then complete the fields on the corresponding modifier page. The following paragraphs describe how to complete these pages.

- Drop-down 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. You can enter price adjustments for each selection. You can also select whether the modifier should be static or dynamic. The customer will be asked for a static modifier just once, regardless of the quantity ordered, whereas the customer will be asked for a dynamic modifier multiple times, for each quantity ordered. You can assign an override accounting code, which will override the default accounting code for the product (or the store).

Dusting Brush: Add Product Modifier
Print Page

Drop-Down Selection Modifier requires the buyer to choose a selection from the list before the article can be added to the cart. For price adjustments, enter only the amount to add to the base product price. Do not enter a total product price.

Back To Products
Back to Product Settings
Back to Manage Modifiers

Drop-down Selection

Name:

Type: Required Optional

Frequency: Static (Displayed once per product) Dynamic (Repeated based on quantity purchased)

The buyer will select from the following entries.

Selection	Price Adjustment	Store Default Accounting Code: MERC
1. <input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	Override Default Accounting Code: <input style="width: 90%;" type="text" value="v"/>
2. <input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	Override Default Accounting Code: <input style="width: 90%;" type="text" value="v"/>
3. <input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	Override Default Accounting Code: <input style="width: 90%;" type="text" value="v"/>
4. <input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	Override Default Accounting Code: <input style="width: 90%;" type="text" value="v"/>
5. <input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	Override Default Accounting Code: <input style="width: 90%;" type="text" value="v"/>
6. <input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	Override Default Accounting Code: <input style="width: 90%;" type="text" value="v"/>
7. <input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	Override Default Accounting Code: <input style="width: 90%;" type="text" value="v"/>
8. <input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	Override Default Accounting Code: <input style="width: 90%;" type="text" value="v"/>
9. <input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	Override Default Accounting Code: <input style="width: 90%;" type="text" value="v"/>
10. <input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	Override Default Accounting Code: <input style="width: 90%;" type="text" value="v"/>

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 conference extras they would like to receive, such as a tote bag, a pen, and a CD. The customer can select as many checkboxes as appropriate. You can also select whether the modifier should be static or dynamic. The customer will be asked for a static modifier just once, regardless of the quantity ordered, whereas the customer will be asked for a dynamic modifier multiple times, for each quantity ordered. You can assign an override accounting code, which will override the default accounting code for the product (or the store).

Dusting Brush: Add Product Modifier

Print Page

Multiple Selection Checkbox Modifier presents a list of options to the buyer. To add an option, the buyer marks its checkbox. For price adjustments, enter only the amount to add to the base product price. Do not enter a total product price.

Back To Products
Back to Product Settings
Back to Manage Modifiers

Multiple Selection Checkbox

Name:

Type: Required Optional

Frequency: Static (Displayed once per product) Dynamic (Repeated based on quantity purchased)

The buyer will select from the following entries.

Selection	Price Adjustment	Store Default Accounting Code: MERC
1. <input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	Override Default Accounting Code: <input style="width: 80%;" type="text"/>
2. <input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	Override Default Accounting Code: <input style="width: 80%;" type="text"/>
3. <input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	Override Default Accounting Code: <input style="width: 80%;" type="text"/>
4. <input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	Override Default Accounting Code: <input style="width: 80%;" type="text"/>
5. <input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	Override Default Accounting Code: <input style="width: 80%;" type="text"/>
6. <input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	Override Default Accounting Code: <input style="width: 80%;" type="text"/>
7. <input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	Override Default Accounting Code: <input style="width: 80%;" type="text"/>
8. <input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	Override Default Accounting Code: <input style="width: 80%;" type="text"/>
9. <input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	Override Default Accounting Code: <input style="width: 80%;" type="text"/>
10. <input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	Override Default Accounting Code: <input style="width: 80%;" type="text"/>

Add More Selections

Add Modifier

- Text Entry Modifier**—You must enter a name for the modifier and select whether the modifier should be a required or optional field. The "Format Validation" field allows you to specify the format of the entry (numeric, alphabetic, e-mail, date, phone number, etc.) so that validation can take place on the customer's entry and undesired characters can be eliminated. (For more about format validation, see **"Validation Formats for Text Entries" on page 339.**) You can also select whether the modifier should be static or dynamic. The customer will be asked for a static modifier just once, regardless of the quantity ordered, whereas the customer will be asked for a dynamic modifier multiple times, for each quantity ordered.

Dusting Brush: Add Product Modifier
Print Page

Text Entry Modifier are shown with the Item For Sale. Price adjustment is the amount added to or subtracted from the base product price.

Back To Products
Back to Product Settings
Back to Manage Modifiers

Text Entry Modifier

Name:	<input type="text"/>
Type:	<input type="radio"/> Required <input checked="" type="radio"/> Optional
Format Validation: <small>What is this?</small>	Free Text ▼
Minimum Characters	<input type="text" value="0"/>
Maximum Characters (100 is Maximum Allowed):	<input type="text" value="100"/>
Price Adjustment:	<input type="text"/>
Hide Modifier In Confirmation Emails:	<input type="checkbox"/> Yes (Recommended with collecting of sensitive data)
Frequency:	<input checked="" type="radio"/> Static (Displayed once per product) <input type="radio"/> Dynamic (Repeated based on quantity purchased)

Add Modifier

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 Text Entry modifier (such as a student ID), you should suppress display of the modifier in confirmation e-mail messages by selecting Yes for "Hide Modifier in Confirmation Emails."

Validation Formats for Text Entries

If you choose the text entry type of product modifier, you will have the opportunity to determine if validation should be performed on the customer's entry.

The following table defines the validation formats that are available for text entries.

Validation Format	Definition/Characters Allowed
Numeric	0123456789
Numeric Extended	0123456789-()., [space]
Alpha	abcdefghijklmnopqrstuvwxyz ABCDEFGHIJKLMNOPQRSTUVWXYZ
Alpha Extended	abcdefghijklmnopqrstuvwxyz ABCDEFGHIJKLMNOPQRSTUVWXYZ -().,& [space] ' [single quote]
Alphanumeric	abcdefghijklmnopqrstuvwxyz ABCDEFGHIJKLMNOPQRSTUVWXYZ 0123456789
Alphanumeric Extended	abcdefghijklmnopqrstuvwxyz ABCDEFGHIJKLMNOPQRSTUVWXYZ 0123456789-().,& [space] ' [single quote]
Free Text	All characters.
Email	The customer must make an entry that contains an @ character and a . (period) character. If the Require Confirmation checkbox is also selected, the customer will see a confirm e-mail field and must enter their e-mail a second time. The entries must be identical.
Date mm/dd/yyyy	Must include 10 total characters, including forward slash characters. Month (mm) must be 00 to 12. Day (dd) must be 00 to 31. Year (yyyy) must include four digits.
Date dd/mm/yyyy	Must include 10 total characters, including forward slash characters. Day (dd) must be 00 to 31. Month (mm) must be 00 to 12. Year (yyyy) must include four digits.
Date yyyy/mm/dd	Must include 10 total characters, including forward slash characters. Year (yyyy) must include four digits. Month (mm) must be 00 to 12. Day (dd) must be 00 to 31.
US/Canada Phone number	(999) 999-9999. Customer must enter the 10 numerical characters. The other formatting (parenthesis around area code, a space before the prefix, and a hyphen before the final four digits) is automatically inserted.
Contains Alpha Characters	The entry must include one alphabetic character as specified above for Alpha validation.
File Name	All characters.

Using the Table Builder

Follow these steps to associate modifiers using the Table Builder.

- 1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products. The Store Products page appears.
- 2 Click the product name link. The Product Settings page appears. Go to Step 3.

OR

Click the Manage link in the Modifiers column of the corresponding product. The Manage Modifiers page appears. Go to Step 5.

- 3 In the General Settings section at the top of the page, click the "Manage Modifiers" link. The Manage Modifiers page appears.

Note: Before you can use Table Builder, modifiers must have already been configured for the product. If modifiers have not yet been created, see "[Adding a Product Modifier](#)" on page 335.

Free Seminar: Manage Modifiers

Add, edit or remove modifiers. Sort key controls display order.

[Back To Product Settings](#)

Add Modifier

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

Add Modifier Group

Type	Example
Table Builder	Example

Modifiers

Name	Sort Key	Type	Frequency	Format What is this?	Actions
Attendee Name	<input type="text"/>	Required Text Entry	Dynamic	Free Text Minimum: 1 Maximum: 30	Edit Remove
Attendee E-mail Address	<input type="text"/>	Required Text Entry	Dynamic	Email Minimum: 6 Maximum: 100	Edit Remove
Attendee Phone Number	<input type="text"/>	Optional Text Entry	Dynamic	US/Canada Phone Number Minimum: 14 Maximum: 14	Edit Remove

[Save Sort](#)

The Modifiers section of the Manage Modifiers page shows the modifiers that have been created. These modifiers are candidates for being used with Table Builder.

- 4 Select the Table Builder text link in the Add Modifier Group section. The Table Builder page appears.

Free Seminar: Table Builder

Table Builder presents modifiers in a table format where each column displays a different modifier.

[Manage Modifiers](#)

Table Builder

Table Name:

Modifier: Select a Modifier

Table Information

Name	Sort Key	Type	Format What is this?	Action

When you start work on the Table Builder page, the Table Information section is empty. As you build the table, modifiers will appear in this section.

- 5 Enter a Table Name. Customers will see this name.
- 6 From the Modifier dropdown list, select a modifier to include in the table and click the "Add Modifier to Table" button.

The modifier that you selected will now appear in the Table Information section.

All modifiers that you have created are included in the Modifier dropdown list. The Table Builder allows you to organize *existing* modifiers into a tabular format. So be sure you have already created *all* the modifiers that you would like to appear in the table *before* you create the table.

Free Seminar: Table Builder

Table Builder presents modifiers in a table format where each column displays a different modifier.

[Manage Modifiers](#)

Table Builder

Table Name:

Modifier: Select a Modifier

Table Information

Name	Sort Key	Type	Format What is this?	Action
Attendee Name	<input type="text"/>	Required Text Entry	Free Text Minimum: 1 Maximum: 30	Remove
Attendee E-mail Address	<input type="text"/>	Required Text Entry	Email Minimum: 6 Maximum: 100	Remove
Attendee Phone Number	<input type="text"/>	Optional Text Entry	US/Canada Phone Number Minimum: 14 Maximum: 14	Remove

After you add modifiers, the Table Information section of the Table Builder page shows the modifiers that are part of the table..

- 7 Repeat Step 7 for all additional modifiers that you would like to include in the table.

Note: You can remove a modifier from the table by clicking the Remove text link in the Action column.

- 8 Specify a sort order for the display of the modifier columns by entering a Sort Key number for each modifier.

Note: The sort order determines the column order, left to right.

- 9 Click the Save button.

Customers will see the associated modifiers displayed in a table when they attempt to add the product to their shopping cart.

Here is an example of what the customers will see:

The screenshot shows the 'YourCampus' website interface. At the top, there's a navigation menu with 'Home', 'Register', 'Log In', and 'My Cart'. Below that is a search bar. The main content area displays a product titled 'Free Seminar'. The product details include: Stock number: 8005841, Price: \$0.00, and Quantity: 3. Below the product details is a table for 'Attendees' with three columns: 'Attendee Name', 'Attendee E-mail Address', and 'Attendee Phone Number'. Each row in the table has input fields for these fields. Below the table, there are sections for 'Session Difficulty' (a dropdown menu) and 'Seating' (a checkbox for 'Would you like a table with your seat(s)?(\$2.00)'). A green 'Continue' button is at the bottom of the form. The footer contains site information, shipping rates, return policy, privacy policy, help, accessibility, and contact us links. The TouchNet logo is in the bottom right corner.

Here is an example of modifiers associated with the Table Builder.

In this example, the product has five modifiers total. Table Builder was used to place three of these modifiers (Attendee Name, Attendee E-mail Address, and Attendee Phone Number) in a table named "Attendees." The other two modifiers (Session Difficulty and Seating) are NOT part of the table.

Editing a Product Modifier

Follow these steps to edit a product modifier.

- 1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products. The Store Products page appears.
- 2 Click the product name link. The Product Settings page appears. Go to Step 3.

OR

Click the Manage link in the Modifiers column of the corresponding product. The Manage Modifiers page appears. Go to Step 5.

- 3 In the General Settings section at the top of the page, click the "Manage Modifiers" link. The Manage Modifiers page appears.

Free Seminar: Manage Modifiers

Add, edit or remove modifiers. Sort key controls display order.

[Back To Product Settings](#)

Add Modifier

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

Add Modifier Group

Type	Example
Table Builder	Example

Modifiers

Name	Sort Key	Type	Frequency	Format What is this?	Actions
Attendee Name	<input style="width: 40px;" type="text"/>	Required Text Entry	Dynamic	Free Text Minimum: 1 Maximum: 30	Edit Remove
Attendee E-mail Address	<input style="width: 40px;" type="text"/>	Required Text Entry	Dynamic	Email Minimum: 6 Maximum: 100	Edit Remove
Attendee Phone Number	<input style="width: 40px;" type="text"/>	Optional Text Entry	Dynamic	US/Canada Phone Number Minimum: 14 Maximum: 14	Edit Remove

[Save Sort](#)

- 4 In the Modifiers section near the bottom of the page, look for the modifier you would like to edit, and then click the Edit link in the Actions column of the corresponding modifier. The Edit Product Modifier page appears.
- 5 Enter the modifier information and price adjustment(s), as described in **"Using the Add/Edit Product Modifier Pages" on page 336**. Then click the "Update Existing Modifier" button.

Using Linked Modifiers

Marketplace allows you to link modifiers so that the display of a modifier can be configured to depend upon the shopper's answer to a previous modifier. For example, a shopper might encounter this modifier question: "Would you like us to contact you for future donations?" And if the shopper answers Yes to this question, another modifier would appear: "Please enter your phone number."

You can link to a different modifier depending on the customer's response. For example, a modifier for a day-long seminar might have this question: "What would you like for lunch?" And this modifier would then provide customers with a dropdown list with the following selections: tuna fish sandwich, Philadelphia steak sandwich, and big salad. Depending on which selection the shopper makes, additional options can be presented. For

example, if they choose "big salad," a linked modifier might ask for their salad dressing choice.

The linked modifier functionality provides you with the powerful ability to ask for additional information (or require an additional selection) depending on a shopper's response to an individual modifier.

What Shoppers See: Linked Modifiers

Here is an example of what shoppers will see when they encounter linked modifiers while adding a product to their shopping cart:

Marketing Seminar
Home | Union Activities | Seminars | Marketing Seminar | Marketing Seminar - Options

The annual Marketing and Enrollment Management Seminar is the premier event for leaders and practitioners responsible for professional, continuing, and online education marketing and enrollment management at colleges and universities around the world.

***Indicates required information**

Stock number: 5765684
 Price: \$50.00
 Quantity: 1

*** What would you like for lunch?** This modifier is linked to another modifier.

Please Select ▼

*** Choose a session emphasis:**

Marketing writing
 Web site design
 Brochure design
 Advertisements

Continue

Here is an example of modifiers associated with the Table Builder.

In this example, when the customer makes a selection from the "What would you like for lunch?" dropdown list, the page changes depending on the customer's selection. Here are examples of how the page will change:

*** What would you like for lunch?**

Tuna fish sandwich ▼

Optional sides for tuna sandwich:

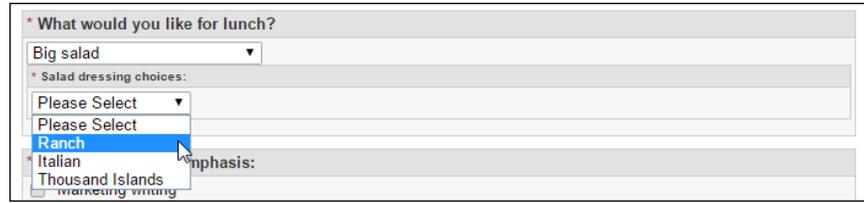
Cole slaw(\$1.00)
 Potato chips(\$1.00)

*** What would you like for lunch?**

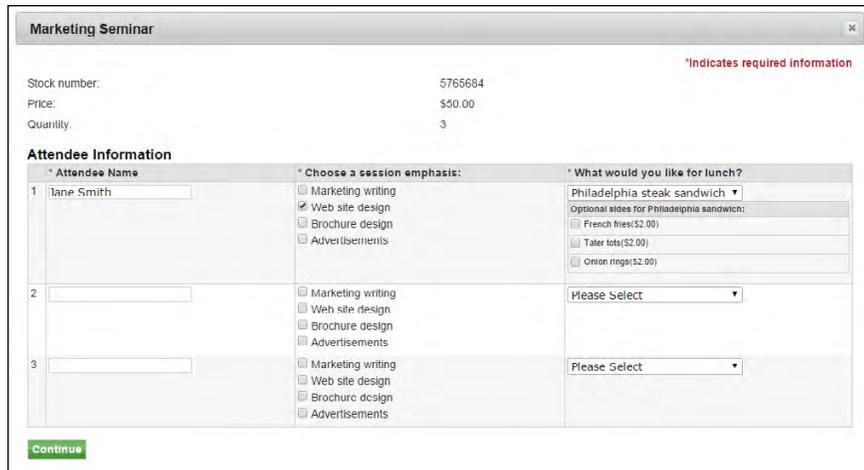
Philadelphia steak sandwich ▼

Optional sides for Philadelphia sandwich:

French fries(\$2.00)
 Tater tots(\$2.00)
 Onion rings(\$2.00)



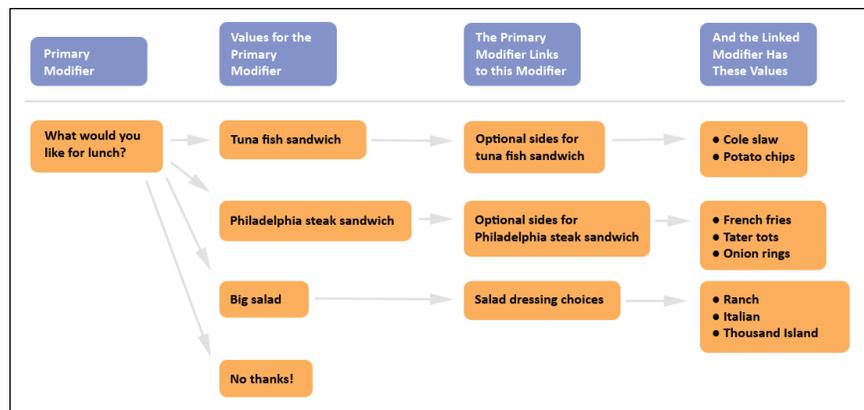
And the following example shows how linked modifiers appear when Table Builder is used:



Planning to Link Modifiers

When you plan to create linked modifiers, you will need to consider 1) the primary modifier that will prompt the customer for a response and 2) the modifiers that you will link to from the available values created for the primary modifier. All these product modifiers must be created in advance of starting the process of linking modifiers. So this process requires some planning to ensure that the various pieces have been created.

It may help you to sketch the primary modifier, its values, the linked modifiers, and the values offered with the linked modifiers. Here is an example of how a sketch might look:



By thinking through this process you will be able to better understand what modifiers and values must be created. Now, as we follow this example to the next level, we'll consider what actions you now need to take after you have completed your sketch. Here is what you must do to make this plan a reality:

- 1** Create a modifier named "What would you like for lunch?"
- 2** Give the following values to the modifier: Tuna fish sandwich, Philadelphi steak sandwich, Big salad, and No thanks!
- 3** Create a modifier named "Optional sides for tuna fish sandwich".
- 4** Give the modier that you create in Step 3 the following values: Cole slaw and Potato chips.
- 5** Create a modifier named "Optional sides for Philadelphia steak sandwich".
- 6** Give the modifier that you created in Step 5 the following values: French fries, Tater tots, and Onion rings.
- 7** Create a modifier named "Salad dressing choices".
- 8** Give the modifier that you created in Step 6 the following values: Ranch, Italian, and Thousand Island.
- 9** Go to the Manage Modifiers page for this product and choose Link in the Actions column for the modifier that you created in Step 1.
- 10** For the primary modifier value of "Tuna fish sandwich," choose this modifier from the dropdown list: "Optional sides for tuna sandwich."
- 11** For the primary modifier value of "Philadelphia steak sandwich," choose this modifier from the dropdown list: "Optional sides for Philadelphia sandwich."
- 12** For the primary modifier value of "Big Salad," choose this modifier from the dropdown list: "Salad dressing choices."
- 13** From the primary modifier value of "No thanks!" choose this modifier from the dropdown list: [Make no selection].
- 14** Click the Submit button.

As you can see, the process of creating linked modifiers can easily involve a dozen or more steps, so it's important to think through this process and consider all the modifiers and modifier values that will be required.

Limitations

Linked modifiers only go one level deep beyond the original modifier. These modifiers must be linked to the response choices that the customer makes. And the linked modifier (which is nested inside the original modifier) cannot lead to additional linked modifiers.

Linked modifiers cannot be used with required text entry modifiers (as the primary modifiers); however, linked modifiers can be used with optional text entry modifiers. When an optional text entry modifier is linked to

another modifier, the linked modifier only appears for shoppers after the shopper selects the Continue button.

How to Link Modifiers

Before you start the process of linking modifiers, it is very important that you have planned this process, as described in "[Planning to Link Modifiers](#)" on page 346. After you have created the necessary modifiers and values, you can then link the modifiers by following these instructions:

- 1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products. The Store Products page appears.
- 2 Click the product name link. The Product Settings page appears.
- 3 In the General Settings section at the top of the page, click the "Manage Modifiers" link. The Manage Modifiers page appears.

Note: If modifiers that you will be linking have not yet been created, see "[Adding a Product Modifier](#)" on page 335.

Marketing Seminar: Manage Modifiers Print Page 

Add, edit or remove modifiers. Sort key controls display order.

[Back To Products](#) [Back To Product Settings](#)

Add Modifier

Type	Example
Drop-down Selection	Example Optional Example Required
Text Entry	Example Optional Example Required
Multiple Select Checkboxes	Example Optional Example Required

Add Modifier Group

Type	Example
Table Builder	Example

Modifiers

Name	Sort Key	Type	Frequency	Format What is this?	Actions
What would you like for lunch?	<input type="text"/>	Required Drop-Down Selection	Static	N/A	Edit Remove Link
Optional sides for tuna sandwich:	<input type="text"/>	Optional MultiSelect Checkbox	Static	N/A	Edit Remove Link
Optional sides for Philadelphia sandwich:	<input type="text"/>	Optional MultiSelect Checkbox	Static	N/A	Edit Remove Link
Salad dressing choices:	<input type="text"/>	Required Drop-Down Selection	Static	N/A	Edit Remove Link
Choose a session emphasis:	<input type="text"/>	Required MultiSelect Checkbox	Static	N/A	Edit Remove Link

[Save Sort](#)

You can link modifiers by selecting Link in the Action column.

- 4 In the list of modifiers that have been created for this product, identify which modifier will be the primary modifier (i.e., which modifier will the shopper see first). And for this modifier, select Link in the Action column.

The Link Modifiers page then appears.

Marketing Seminar: Link Modifiers Print Page 

For each primary modifier value displayed in the Linked Modifiers table below, you can select a sub modifier from the "Link to this modifier..." drop-down list.

Primary Modifier			
Primary Modifier Name	Type	Frequency	Format
What would you like for lunch?	Required Drop-Down Selection	Static	N/A

Linked Modifiers	
For this primary modifier value...	Link to this modifier...
Tuna fish sandwich	Select a Sub Modifier
Philadelphia steak sandwich	Optional sides for tuna sandwich: Optional sides for Philadelphia sandwich:
Big salad	Salad dressing choices: Choose a session emphasis:
No thanks!	Select a Sub Modifier

The Link Modifiers page lets you link modifiers to specific values that were previously assigned to the primary modifier.

- For each value listed in the "For this primary modifiers value ..." field, select a modifier from the dropdown list in the "Link to this modifier ..." column.
- Repeat Step 5 for all values for the primary modifier.

Note: If you do not plan to link a modifier to a value of the primary modifier, do not select a value from the "Link to this modifier ..." dropdown list.

- Select the Save button.

The Manage Modifiers page then appears again. The linked modifiers can be identified by the word "Unlink" in the Actions column. In addition, the linked modifiers do not have a text field in the Sort Key column (because the linked modifiers will be displayed to shoppers in the order of the primary modifier section values.)

- (Optional) You can use the Table Builder option on the Manage Modifiers page to arrange the modifiers.

How to Edit Linked Modifiers

After modifiers have been linked, you can use functionality on the Manage Modifiers page and the Edit Modifier page to manage how the linked modifiers are related to the primary modifier.

Marketing Seminar: Manage Modifiers Print Page 

Add, edit or remove modifiers. Sort key controls display order.

Your Modifiers have been linked successfully.

Back To Products
Back To Product Settings

Add Modifier

Type	Example
Drop-down Selection	Example Optional Example Required
Text Entry	Example Optional Example Required
Multiple Select Checkboxes	Example Optional Example Required

Add Modifier Group

Type	Example
Table Builder	Example

Modifiers

Name	Sort Key	Type	Frequency	Format What is this?	Actions
What would you like for lunch?	<input type="text"/>	Required Drop-Down Selection	Static	N/A	Edit Remove Link
Optional sides for tuna sandwich:		Optional MultiSelect Checkbox	Static	N/A	Edit Remove Unlink
Optional sides for Philadelphia sandwich:		Optional MultiSelect Checkbox	Static	N/A	Edit Remove Unlink
Salad dressing choices:		Required Drop-Down Selection	Static	N/A	Edit Remove Unlink
Choose a session emphasis:	<input type="text"/>	Required MultiSelect Checkbox	Static	N/A	Edit Remove Link

Save Sort

After a modifier has been linked, the word "Unlink" appears in the Actions column.

After you link a modifier to a primary modifier, the word "Unlink" appears in the Actions column for the linked modifier. You can select "Unlink" to break the link between this modifier and the primary modifier.

Note: If you Unlink a modifier, you should consider whether the purpose of the modifier will still be clear to customers. In some instances, you may need to alter the name of the modifier after you unlink it.

If you select Edit in the Actions column for the primary modifier, the Edit Product Modifier page appears.

Marketing Seminar: Edit Product Modifier Print Page

Drop-Down Selection Modifier requires the buyer to choose a selection from the list before the Item for Sale is added to the cart. For price adjustments, enter only the amount to add to the base product price. Do not enter a total product price.

[Back To Products](#)
[Back to Product Settings](#)
[Back to Manage Modifiers](#)

Drop-Down Selection

Name:

Type:
 Required
 Optional

Frequency:
 Static (Displayed once per product)
 Dynamic (Repeated based on quantity purchased)

Buyer will make selection from the entries below:

Selection	Price Adjustment	Store Default Accounting Code:	Link Modifier
1. <input type="text" value="Tuna fish sandwich"/>	<input type="text" value="1.00"/>	Override Default Accounting Code: <input type="text"/>	Optional sides for tuna sandwich:
2. <input type="text" value="Philadelphia steak sandwich"/>	<input type="text" value="2.00"/>	Override Default Accounting Code: <input type="text"/>	Optional sides for Philadelphia sandwich:
3. <input type="text" value="Big salad"/>	<input type="text" value="1.00"/>	Override Default Accounting Code: <input type="text"/>	Salad dressing choices:
4. <input type="text" value="No thanks!"/>	<input type="text" value="0.00"/>	Override Default Accounting Code: <input type="text"/>	N/A

[Add More Selections](#)

[Update Existing Modifier](#)
[Create New Modifier](#)

The names of linked modifiers appear in the Link Modifier column for each modifier selection value.

You can select the modifier name in the "Link Modifier" column to view the Edit Product Modifier and edit the values for the linked modifier, including the price adjustment and the override accounting code.

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 left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products. The Store Products page appears.
- 2 Click the product name link. The Product Settings page appears. Go to Step 3.

OR

Click the Manage link in the Modifiers column. The Manage Modifiers page appears. Go to Step 5.

- 3 In the General Settings section at the top of the page, click the "Manage modifiers" link. The Manage Modifiers page appears.
- 4 Scroll down to the "Modifiers" section. This section lists all the modifiers that have been added to the product.

Writers Symposium: Manage Modifiers

Add, edit or remove modifiers. Sort key controls display order.

Back To Product Settings

Add Modifier

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

Add Modifier Group

Type	Example
Table Builder	Example

Modifiers

Name	Sort Key	Type	Frequency	Format What is this?	Actions
Handbook	<input type="text" value="1"/>	Required Selection	Static	N/A	Edit Remove
Sessions (Please select all desired)	<input type="text" value="2"/>	Optional MultiSelect Checkbox	Static	N/A	Edit Remove
Attendee Name	<input type="text" value="3"/>	Optional Text Entry	Static	Free Text Minimum: 0 Maximum: 20	Edit Remove
Attendee E-mail Address	<input type="text" value="4"/>	Optional Text Entry	Static	Free Text Minimum: 0 Maximum: 20	Edit Remove
Address	<input type="text" value="5"/>	Optional Text Entry	Static	Free Text Minimum: 0 Maximum: 60	Edit Remove
City	<input type="text" value="6"/>	Optional Text Entry	Static	Free Text Minimum: 0 Maximum: 40	Edit Remove
State (Two-letter abbreviation)	<input type="text" value="7"/>	Optional Text Entry	Static	Free Text Minimum: 0 Maximum: 2	Edit Remove
Zip Code	<input type="text" value="8"/>	Optional Text Entry	Static	Free Text Minimum: 0 Maximum: 10	Edit Remove
May we include your name on a public guest list?	<input type="text"/>	Required Selection	Static	N/A	Edit Remove

Save Sort

- 5 For the modifier that you need to delete, click the Remove text link in the Actions column. The Delete Product Modifier page appears.
- 6 You will need to specify how the modifier should be removed. You can choose to remove the modifier from all the "Items for Sale" by selecting the "Remove From All" button. Or you can remove the modifiers from selected "Items for Sale": CTRL click all applicable "Items for Sale" displayed in the list box and then click the "Remove From Selected" button.

5.9 Product Status Management

Store managers and store clerks can use the Manage Status page to change the availability of products. Products can be enabled, disabled, and placed

in preview mode. These status changes can be made immediately or the changes can be scheduled to take place at particular dates and hours. In addition, products can be deleted.

To view the Product Status Management page, first navigate to the Product Details page for a product (as described in "[Editing Products](#)" on page 283). Then select the "Manage status" link in the "Ustore status" section. The Product Status Management page then opens.

Student Parking Pass: Manage Status

Settings on this page manage updating and scheduling product status

[Back To Product Settings](#) [Back To Products](#)

Update Status

Name	Store Status	Mobile Store Status	Action
Student Parking Pass	Enabled	Enabled	Delete

Schedule Status Update

Schedule Store status :
24-hour (example: 00 for Midnight)
Store Time Zone: Central Standard Time

Current status: Enabled
New status:
Update Status Date:
Update Status Hour:

Schedule Mobile status :
24-hour (example: 00 for Midnight)
Store Time Zone: Central Standard Time

Current status: Disabled
New status:
Update Status Date:
Update Status Hour:

[Save Schedule](#)

Scheduled Status Updates

No Scheduled Status Updates

Scheduled Status History

No Scheduled Status History

The Product Status Management page allows you to schedule status changes.

Updating the Current Product Status

To update the current status of a product, simply choose a new status from the Store Status dropdown menu in the "Update Current Product Status" section of the Product Status Management page.

The following states are available for the product status:

- **Enabled**—Once a store is enabled, the product is available for shoppers.
- **Disabled**—When a product is disabled, shoppers will not be able to see this product.
- **Preview**—Products in preview mode are not available to shoppers. Once placed in Preview mode, a product can only be viewed by using the View link on the Product Details page of the corresponding product. Preview mode can be used to view how a product will look and function before you enable the product.

The choice that you make will immediately affect the availability of the product.

Using Preview Status

You can use the preview status to view how a product will look and function before you enable the product. Preview status is particularly important if you have added HTML to the Long Description for a product: you can use preview mode to see how the HTML will be rendered by browsers.

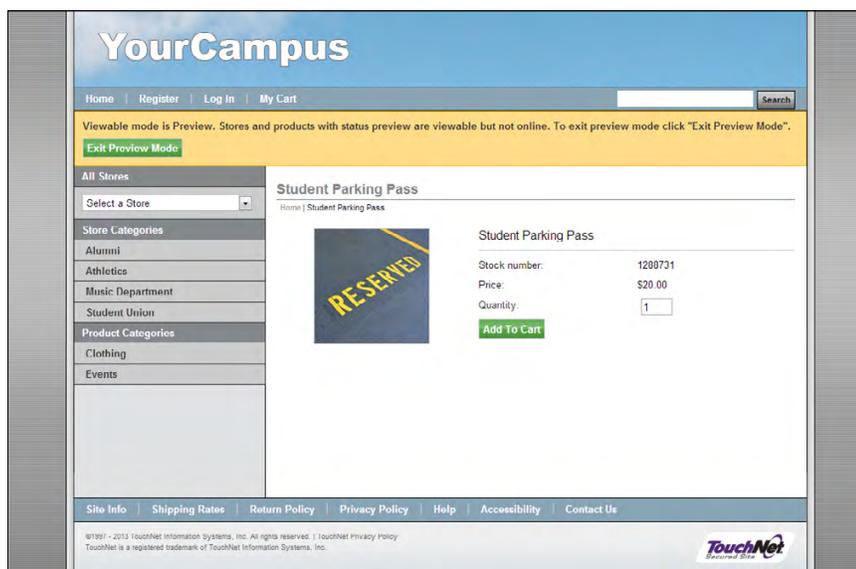
After you have changed the status of a product to PREVIEW, you can view the product by navigating to the Product Details page:

Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products.

Products									
Select	Name	Type	Items for Sale	Quantity	Sort Key	Store Status	Mobile Status	Modifiers	Action
<input type="checkbox"/>	Faculty Parking Pass	Generic	1	Not Tracked		ENABLED	ENABLED	Add	Delete
<input type="checkbox"/>	Student Parking Pass	Generic	1	Not Tracked		PREVIEW	ENABLED	Add	View Delete

For products in preview mode, a "View" link appears in the "Ustore status" section of the Product Details page.

If a product is in preview mode, a link named "View" appears in the Action column. When you select this link, a new browser window is opened that displays the product.



Preview mode allows you to see what shoppers will see.

An orange status bar indicates that the store is being displayed in preview mode. You can navigate to categories and products within the store. You can leave preview mode by selecting the Exit Preview Mode button.

Stores in preview mode are not available for shoppers. Once a store is placed in preview mode, it can only be reached by using the preview link on the Store General Settings page.

Scheduling Status Updates

In addition to immediately changing the status of products, you can schedule a status update by using the Schedule Status Update section of the Product Status Management page.

You can schedule a status change by using the Product Status Management page.

To schedule an update to product status, use the following instructions:

- 1 Select a product status from the "New status" dropdown menu. For more information about the store status options, see ["Updating the Current Product Status" on page 353](#).
- 2 Enter a date in the "Update Status Date" field (or select the calendar icon to choose a date using the calendar widget). If you enter a date, you must use this format: m/d/yy. For example, enter October 29, 2012 as **10/29/12**.
- 3 Select an hour from the Update Status Hour dropdown menu. This dropdown shows hours in military time. For example, to choose 11 p.m. as the Update Status Hour, select **23**.
- 4 Choose the Save Schedule button.

Once a status update has been scheduled, it appears in the Schedule Status Updates table.

Update	Scheduled Status	Scheduled Date	Scheduled Hour	Action
STORE	Disabled	1/10/13	1:00	Delete
STORE	Enabled	1/11/13	1:00	Delete

Scheduled Status History
No Scheduled Status History

Scheduled status updates appear in this table.

You can remove a scheduled status update by selecting the Delete History link.

5.10 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: Do not include bracket characters in the URL.

6.0 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 section first describes user groups and private stores and then provides instructions for how to implement this functionality.

6.1 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.

6.2 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

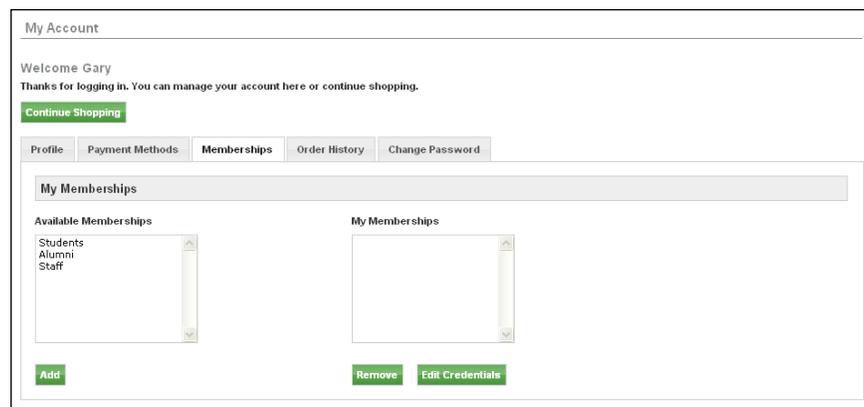
see any private stores that require membership in the user groups to which they belong.

- **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.

6.3 Becoming a Registered User and Adding 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 Register link (in the top navigation bar) and completing the fields on the "Create an Account" page (including the username, password, first name, last name, 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 My Account link in the top navigation menu) and then selecting Memberships from the selections available on the My Account screen.



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 page appears, which requires the user to enter a username and password for the group.

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 private 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.

6.4 How to Establish a Private Store

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 Cashing, 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 ["How to Add an Authentication Method" on page 360.](#))
- 4 The Marketplace administrator creates a new group for the users who will be allowed in the store. (See ["How to Create a User Group" on page 362.](#))
- 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 221.](#))

- 6 The store manager defines what payment methods the allowed groups can use in the store. (See "[Group Payment Methods](#)" on page 223.)

After these steps are completed, only the allowed groups will be able to purchase from the private store.

6.5 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.

Banner by Ellucian

If your institution uses general ledger integration with Banner by Ellucian, see "[Configuring An Authentication Method for Banner](#)" on page 523 for more information regarding the configuration of an authentication method.

To add a new authentication method:

- 1 From the left navigation menu in the Marketplace Operations Center, navigate to Marketplace Home > System Administration > User Settings > User Authentication. The Marketplace User Authentication page appears.
- 2 Click the Add New Authentication Method link. The Add a New Authentication Method page appears.

Add A New Authentication Method

Before you can create a new group, you must create an XML transaction for authentication of group members. The transaction must be defined with a unique code in the Transaction Manager's transaction attributes table.

Authentication Method Settings

Name:	<input type="text"/>
Description: (maximum of 500 characters)	<input style="width: 100%; height: 40px;" type="text"/>
Contact the system administrator for transaction code values.	
Transaction code:	<input type="text"/>
TransMgr:	tpg <input type="button" value="v"/>
Instructions to Buyer: (maximum of 2000 characters)	<input style="width: 100%; height: 40px;" type="text"/>
Logon prompt:	<input type="text"/>
Password prompt:	<input type="text"/>
Request XML logon tag name:	<input type="text"/>
Request XML password tag name:	<input type="text"/>
Response XML output tag name:	<input type="text"/>
Response XML output tag type:	Value <input type="button" value="v"/>

- 3 Complete the fields as described below in "Field Definitions," and then click the Save button.

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.

6.6 How to Create a User Group

Note: Only administrators can create user groups.

To create a user group:

- 1 From the left navigation menu, navigate to Marketplace Home > System Administration > User Settings > User Groups. The uStores User Groups page appears.
- 2 Click the Add New Group link. The Add a New uStores Group page appears.

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.

6.7 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 left navigation menu, navigate to Marketplace Home > System Administration > User Settings > User Groups. The uStores Groups page 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

Here are examples of linking to the Marketplace uStores Home page:

Example 1 Use the first example if you want both the user name and the password passed when linking to the Marketplace mall home page.

```
<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 Use the second example if you want users to re-enter their passwords.

```
<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

Here are examples of linking to a store's home page:

Example 1 Use the first example if you want both the user name and the password passed when linking directly to a private store.

```
<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 Use the second example if you want users to re-enter their passwords.

```

<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

Here are examples of linking to a store category page:

Example 1 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.

```

<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 Follow the second example if you want users to re-enter their passwords.

```
<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>
```


7.0 Orders

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.

This section also describes how to use Order Search functionality. Only users with the fulfiller user role can view and use the fulfillment pages. However, store users without the fulfiller user role can use Order Search.

7.1 Order Search

The Order Search page allows you to search all orders for the specified store.

To view the Order Search page, make the following selections in the left navigation menu:

Navigate to Marketplace Home > [merchant] > Stores > [store] > Order Search.

Student Union Order Search

Search by any of the available information. Print Page

Order Search

Enter one or more filter values for order search.

Order Number:	<input type="text"/>
Payment Gateway Reference Number:	<input type="text"/>
Credit Card Authorization Code:	<input type="text"/>
Customer Name:	<input type="text"/>
Customer Email:	<input type="text"/>
Customer Phone Number:	<input type="text"/>
Order Date:	From: <input type="text"/> <input type="text"/> To: <input type="text"/> <input type="text"/>
Fulfilled Date:	From: <input type="text"/> <input type="text"/> To: <input type="text"/> <input type="text"/>

Note: If you would like to search orders in multiple stores, use the search functionality available through the Marketplace Home page.

Order Search

To use Order Search, enter values in one or more of the following search fields and then select the Run Search button.

Order Number

When an order is submitted, an order number is assigned. This order number appears in the confirmation e-mail message sent to the customer. To search with an order number, you must enter a complete order number (i.e., if you enter a partial order number, you will get zero search results).

Payment Gateway Reference Number

The reference number returned by Payment Gateway after the transaction was processed. This order number appears in the confirmation e-mail message sent to the customer. (See the note below regarding partial entries.)

Credit Card Authorization Code

The credit card authorization code is returned by Payment Gateway after the transaction is processed. This number is stored as part of the order's fulfillment information. (See the note below regarding partial entries.)

Customer Name

The name entered by the customer as the billing name when the order was submitted. (See the note below regarding partial entries.)

Customer Email

The e-mail address entered by the customer on the Delivery Address page of the uStores checkout process. (See the note below regarding partial entries.)

Order Date

The date that the customer submitted the order. If you search by Order Date, you must enter a date range by using the From and To fields. You can select a date by selecting the calendar icon.

Fulfilled Date

The date the order was fulfilled. If you search by Fulfilled Date, you must enter a date range by using the From and To fields. You can select a date by selecting the calendar icon.

Note: You can make partial entries in the following fields: Payment Gateway Reference Number, Credit Card Authorization Code, Customer Name, and Customer Email. If you make a partial entry in any of these fields, all orders with matching data anywhere in the specified field will appear in the search results.

Search Results

The order search returns records of any orders that fit the search criteria you entered.

ID	Date/Time	Type	Buyer Name	Buyer Email	Ship To Name
115	11/22/2011 09:52:43 AM EST	Stores	John Doe	jdoe@touchnet.com	John Doe
119	11/29/2011 12:26:40 PM EST	Stores	John Doe	jdoe@touchnet.com	
120	11/29/2011 01:25:49 PM EST	Stores	John Doe	jdoe@touchnet.com	
998	02/20/2014 04:52:31 PM EST	Stores	John Doe	jdoe@touchnet.com	

Showing 1 to 4 of 4 entries

First Previous 1 Next Last

Results of an order search

Click the ID number to see more detailed information about the order (including fulfillment information). The Payment Details page then appears.

Order Details

The Order Details page includes several sections: Order Details, Return Policy, and Shipment.

Student Union Order Details

Review order, shipment, and fulfillment details for your order.

Print Page

New Order Search
Search Results

Order Details

Order ID:	998
Order Date:	02/20/2014 04:52:31 PM EST
Buyer:	John Doe 15520 College Blvd Lenexa, KS 66219 US jdoe@touchnet.com
Payment Method:	Credit Card : MasterCard

Return Policy

Shipment (1088)

Delivery Method:	None
------------------	------

Ordered Items

Ordered Item Id	Item Name	Item Stock No.	Quantity Ordered	Item Price	Quantity Not Fulfilled	Quantity Cancelled	Quantity Returned
1280	Hat	2270134	1	\$15.00	1	0	0
Totals							
Items:							\$15.00
Shipping:							\$0.00
Taxes:							\$0.83
Grand Total:							\$15.83

Fulfillment (2984)

Type:	Authorization
Date:	02/20/2014 04:52:34 PM EST
TPG Reference Number:	20140220000027
Credit Card Authorization Code:	155233

Fulfilled Item Id	Item Name	Item Stock No.	Quantity
1280	Hat	2270134	0

The Order Details page shows information about the buyer, the ordered items, and the fulfillment.

The shipment section may contain several sub-sections.

The Ordered Items

This sub-section lists all the items that were ordered, the quantity ordered of each item, the item price, the quantity fulfilled, the quantity cancelled, the quantity returned, and the grand totals.

Fulfillment (Type: Authorization)

This sub-section appears if the "Authorize Credit Card at Order Time" option was turned on in the Merchant settings AND the order was not auto-fulfilled. This sub-section represents the amount the customer's credit card was encumbered.

Note: Authorizations that are not fulfilled with 72 hours are automatically reversed.

Fulfillment (Type: Authorization Reversal)

This sub-section appears under the following conditions: 1) the "Authorize Credit Card at Order Time" option was turned on in the Merchant settings, 2) the order was not auto-fulfilled, and 3) the order was not fulfilled within 72 hours. Authorizations that are not fulfilled within 72 hours are automatically reversed. If an authorization reversal takes place, the order can still be fulfilled.

Fulfillment (Type: Purchase)

This sub-section appears after the order is fulfilled (including orders that are auto-fulfilled). When this sub-section appears, the customer's credit card has been debited for the amount specified in the Grand Total field.

Fulfillment (Type: Return)

This sub-section appears after an order has been fulfilled (or auto-fulfilled) in the following situations: 1) a return has been processed or 2) a refund has been processed. The number of items returned appears in the Quantity Returned field. The refund amount appears in the Totals fields.

Note: When a refund is processed, the tax amount is automatically calculated.

7.2 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

Each ACH payment is subject to a wait days period before the associated order can be fulfilled.

If the wait days period has not passed, Marketplace will not allow the order to be fulfilled by a user with the Fulfiller user role—in case Payment Gateway receives notice that the ACH payment was rejected by the bank. However, a user with the "Fulfiller with Cancel/Refund Rights" user role CAN fulfill an order that uses the ACH payment method before the wait days period has passed—provided Payment Gateway has received notification from the bank that the order has settled.

If the specified number of wait days has passed, the order can be fulfilled by users with either the Fulfiller user role or the "Fulfiller with Cancel/Refund Rights" user role—regardless of whether the payment has settled.

If the wait days period has not yet passed AND the payment has not settled, Marketplace will not allow the order to be fulfilled by any users, regardless of their user roles. However, in this situation, a user with the "Fulfiller with Cancel/Refund Rights" user role CAN cancel the order (while a regular Fulfiller canNOT).

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 283.)

Note: Any changes to the merchant-level wait days setting (or the product-level wait days setting) will not affect existing orders—only future orders.

About Invoice Me and Fulfillment

When a customer chooses the Invoice Me payment method, no assets are exchanged in Payment Gateway. Rather the customer receives an e-mail message that has been configured for use with Invoice Me (Store General Settings). The store manager can configure these e-mail messages to provide instructions regarding payment. (And therefore the e-mail message serves as the "invoice.")

Orders that use Invoice Me appear on the Fulfillments page for the store. A fulfiller can update the status of these orders. The following payment status values are available: Payment Received, Complimentary, and To Be Paid. Upon updating the payment status, the fulfiller can choose to send an e-mail notification message to the customer.

7.3 Fulfillments

To start the process of fulfilling an order, you must navigate to the Fulfillments page. Only users with the Fulfiller user role (including users with the "Fulfiller with Cancel/Refund Rights" user role) will be able to

navigate to the Fulfillments page. To open the Fulfillments page, make the following selections in the left navigation menu:

Navigate to Marketplace Home > [merchant] > Stores > [store] > Fulfill Orders.

Note: The number of orders awaiting fulfillment will immediately follow the menu option "Fulfill Orders" in the left navigation menu.

Pending Fulfillments

This section displays the total number of order fulfillments that need to be processed. You can select the Refresh Pending Fulfillments button to update this page with any additional orders that have been received since the page first loaded.

Order Search

To use Order Search for displaying orders that require fulfillment (or that have already been fulfilled), select a value from the filter field, enter or choose a date range, and then select the Search button. You can also search by entering an order number and selecting the "Search by Order Number" button.

To modify the order search, select value for filtering

The following values are available in this field:

- **Pending**—Orders awaiting fulfillment for the entered/selected date range.
- **Order Date**—All orders for the entered/selected date range. Orders awaiting fulfillment will be displayed as well as orders that have already been fulfilled or cancelled. Includes orders in which recurring payments were established.
- **Fulfilled Date**—All orders that were fulfilled during the entered/selected date range will be displayed, as well as orders with payments that were declined.

- **Recur Order Date**—Orders in which recurring payments were established (regardless of whether payments have yet taken place) will be displayed for the entered/selected date range.
- **Recur Payment Date**—Display a list of all recurring payments that are scheduled to take place (or have already taken place) during the entered/selected date range.

Note: When the page first loads, the "Pending" filter is selected by default, so all pending orders will be displayed.

From [and] To [Date Range]

You can enter a date range by using the From and To fields. Dates must be entered in this format: mm/dd/yyyy. You can also choose a date by selecting the calendar icon and using the calendar widget.

If no date range is entered, all orders for the selected filter will be displayed.

Order Number

When an order is submitted, an order number is assigned. This order number appears in the confirmation e-mail message sent to the customer. To search with an order number, you must enter a complete order number (i.e., if you enter a partial order number, you will get zero search results). Then select the "Search by Order Number" button.

Pending Fulfillments

This section displays all the orders that meet the search criteria. When the Fulfillments page first displays, all pending orders are displayed. The results can be sorted by using the up and down arrows (ascending order and descending order) in the Order Number, Order Date, Delivery Method, and Payment Method column headers.

Pending Fulfillments							
<input type="checkbox"/> Select All	▲▼ Order Number	Shipment Number	▲▼ Order Date	Buyer Name	▲▼ Delivery Method	▲▼ Payment Method	Status
<input type="checkbox"/>	67	70	03/23/2015 03:36:16 PM GMT	Jane Doe	USPS Priority Mail	ACH	PENDING
<input checked="" type="checkbox"/>	76	79	03/24/2015 02:37:03 PM GMT	Jane Doe	USPS Priority Mail	ACH	PENDING
<input type="checkbox"/>	78	81	03/25/2015 04:10:29 PM GMT	Don Williams	USPS Priority Mail	Credit Card	PENDING
<input type="checkbox"/>	87	90	03/25/2015 09:58:43 PM GMT	Jane Doe	USPS Priority Mail	Credit Card	PENDING

Payments Declined or Not Settled							
▲▼ Order Number	Shipment Number	▲▼ Order Date	Buyer Name	▲▼ Delivery Method	▲▼ Payment Method	Payment Status	Action
223	226	03/25/2015 08:01:47 PM GMT	Gary Johnson	USPS Express Mail	ACH	Pending	Cancel Order

✖ This order has not passed the ach waiting period.

Process Fulfillment

Orders awaiting fulfillment appear in the Pending Fulfillments table

Select All [and the selection checkboxes]

You can choose which orders you would like to fulfill by selecting the checkboxes in the far left column and then selecting the Process Fulfillment button. You can select all the displayed orders by selecting the Select All checkbox in the column header.

Users with the "Fulfiller with Cancel/Refund Rights" user role may see a red X beside orders in which the payment method is ACH. If a red X appears, it means the payment has settled in Payment Gateway; however, the waiting period for ACH payments has not expired. A user with the "Fulfiller with Cancel/Refund Rights" user role can fulfill orders with a red X.

Users with the Fulfiller user role (but NOT the "Fulfiller with Cancel/Refund Rights" user role), may encounter a situation in which there is no checkbox in this column. This means the payment has settled in Payment Gateway, but the waiting period for ACH payments has not expired; therefore, the order cannot be fulfilled at this time by this user. Only a user with the "Fulfiller with Cancel/Refund Rights" user role can process an order that has settled before the ACH wait period has expired.

Order Number

When an order is submitted, an order number is assigned. This order number appears in the confirmation e-mail message sent to the customer. If a customer adds products from multiple stores to their shopping cart, multiple order numbers will result. Likewise, if a customer uses multiple payment methods for products from a store, the order will be split into multiple orders according to the selected payment methods.

Shipment Number

Orders may be split into multiple shipments when the customer uses different delivery methods for products in the same shopping cart. Therefore, a shipment number is assigned to each group of products that will go into the same shipment.

Order Date

The date the customer completed the checkout process.

Buyer Name

The buyer name that the customer entered during the checkout process. This buyer name is tied to the payment method used by the customer.

Delivery Method

The delivery method that the customer selected during the checkout process. Delivery method names are configured in the Administrative settings. For each store, the available delivery methods are determined by the shipping class.

Status

This column typically says PENDING, which means the order is ready to be fulfilled..

Payment Declined or Not Settled

If any ACH orders have not yet settled—and the ACH wait days period has not expired—then these orders will not appear in the Pending Fulfillments table. Instead, they will appear in the "Payment Declined or Not Settled" table. In addition, ACH payments that were declined will also appear in the "Payment Declined or Not Settled" table. Orders in the "Payment Declined or Not Settled" table cannot be fulfilled; however, these orders can be cancelled, but only by a user with the "Fulfiller with Cancel/Refund Rights" user role.

Most of the columns in the "Payment Declined or Not Settled" table are identical to those in the Pending Fulfillments table, with the following exceptions:

Payment Status

ACH orders that have not settled in Payment Gateway will show a "Payment Status" of Pending. This does NOT mean the order is ready to be fulfilled (unlike the Status column in the Pending Fulfillments table). In fact, these orders cannot be fulfilled—even by users with the "Fulfiller with Cancel/Refunds Rights" user role. Once these orders have settled in Payment Gateway, they will automatically move to the Pending Fulfillments table. Also, when the ACH wait days period expires, these orders will move to the Pending Fulfillments table and can subsequently be fulfilled.

Action

Only one action may appear in this column: Cancel Order. Only users with the "Fulfiller with Cancel/Refund Rights" user role will see Cancel Order in this column. These users can select this link to cancel the order.

Invoice Me Payment Status

This section only appears if one or more orders in the search results used Invoice Me as the payment method. For details on how to process Invoice Me payments, see ["Fulfilling Invoice Me Orders" on page 380](#)

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 > Stores > [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. Choose a filter and a date range, or search by order number.

- 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 can only be fulfilled by a user with the "Fulfiller with Cancel/Refund Rights" user role.

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 may 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 381**.

Note: If you see error messages after clicking the Accept Payment button, see the Exception Codes help system on the TouchNet Client Community for information about the error message. 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 system was not yet updated successfully. Continue processing the fulfillment.

- 7 (For Invoice Me orders only) If necessary, you can update the Invoice Me Payment Status at this time. The following status values are available: To Be Paid (which is the default value), Payment Received, and Complimentary. If you change the status to Payment Received or Complimentary, the order will be considered completed. However, you can fulfill the order, leave the order in "To Be Paid" status, and update the payment status at a later date (typically once payment is received). Click the Proceed to Step 3 button.

Note: You can update the payment status at a later date by returning to the Fulfillments page and using the Invoice Me Payment Status section (as described in **"Fulfilling Invoice Me Orders" on page 380**).

- 8 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.

- 9 Close the packing list window, and then click the Proceed to Step 3 button. (If the order uses Invoice Me, the button will say Proceed to Step 4.)
- 10 Enter a tracking number (if applicable), and click the Proceed to Step 4 button. (If the order uses Invoice Me, the button will say Proceed to Step 5.)
- 11 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).

Note: If you skip the steps for generating a packing slip or entering a tracking number, you can later search for each order being fulfilled and then print packing slips or enter tracking numbers.

Important! If you receive an error code during the fulfillment process, see the Exception Code help system on the TouchNet Client Community for information about the error message.

Fulfilling Invoice Me Orders

If any Invoice Me orders have been received, a separate section named Invoice Me Payment Status appears near the bottom of the Fulfillments page.

Invoice Me orders that require fulfillment appear in both the Pending Fulfillments section AND the Invoice Me Payment Status section. When you fulfill an Invoice Me order, you will be given the opportunity to update the payment status as part of the fulfillment process (as described in "**Fulfilling Orders**" on page 378); however, you may not have received the payment at the time that you process the fulfillment. In this case, you can return to the Fulfillments page at a later date and update the payment status.

Note: Invoice Me orders that are auto fulfilled will only appear in the Invoice me Payment Section section and not in the Pending Fulfillments section.

To update the payment status of an Invoice Me order, follow these steps:

- 1 Navigate to Marketplace Home > Stores > [store name] > Fulfill Orders. The pending orders list opens.
- 2 Scroll down the page to the "Invoice me Payment Status" section.

Note: All outstanding orders with a payment method of Invoice Me appear in this section. These orders initially appear with the status of "To Be Paid."

- 3 Select the corresponding checkbox for each Invoice Me order that you would like to update.
- 4 Click the Process Invoice Me button.

- 5 Review the displayed order information.
- 6 Select a payment status from the Invoice Me Payment Status dropdown list. The following status values are available: To Be Paid (which is the default value), Payment Received, and Complimentary. If you change the status to Payment Received or Complimentary, the order will be considered completed.
- 7 Click the Update Payment Status button.

7.4 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 378. 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 ACH wait days have not yet expired.

To cancel an order or to change the order quantity, follow these steps:

- 1 Navigate to Marketplace Home > Stores > [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 ACH payments until the ACH wait 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 an 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 quantity 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.

7.5 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.

7.6 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 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.

Processing a Refund

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 > [merchant name] > Stores > [store name] > Fulfill Orders. The Store Fulfillment List page appears.
- 2 Select Fulfilled Date or Ordered Date from the Show Orders dropdown list, and then select a date range to search. Click the Search button. 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 alternately enter the order number in the "Search by Order #: field and then click the Search button.

- 3 Locate the order in the displayed list and click its View button. The Store Fulfillment page appears.

The New Quantity to Return field will be editable for each item in the order. Other editable fields for refunds may appear depending on how the store has been configured.

Important! The Refund Amount field only appears if partial refunding has been enabled (by setting the "Allow Partial Refunds" option to Yes on the Store General Settings page). If this option has been set to Yes, the Refund Amount field will be editable for each item in the order. Likewise, shipping cost refunds are only available if "Allow the Refunding of Shipping" is set to Yes on the Store General Settings page.

Process Refund

Total amount available to refund: \$897.22

Item	Stock #	Quantity Ordered	Quantity Not Fulfilled	Quantity Cancelled	Quantity Returned	Refundable Amount	New Quantity To Return	Refund Amount
Wooden Drafting Pencil	1118884	1	0	0	0	\$3.17	0 ▾	\$ <input type="text"/>
(Req. Authorization) What is the super secret password?:		asdf						
Mechanical Pencil	5535571	47	0	0	0	\$446.50	0 ▾	\$ <input type="text"/>
Pentel 1000	1668423	31	0	0	0	\$359.94	0 ▾	\$ <input type="text"/>

Enter the amount of shipping you wish to refund

Refundable Shipping Amt	\$87.61
Refund Amount	<input type="text"/>

To refund one or more of each item, enter the quantity returned and/or refund amount, then click Process Refund.

Process Refund

The Fulfillment page includes the Refund Amount field if the "Allow Partial Refunds" option has been set to Yes on the Store General Settings page. This page also includes fields regarding shipping refunds if "Allow the Refunding of Shipping" is set to Yes on the Store General Settings page.

Process Refund

Total amount available to refund: \$897.22

Item	Stock #	Quantity Ordered	Quantity Not Fulfilled	Quantity Cancelled	Quantity Returned	New Quantity To Return
Wooden Drafting Pencil	1118884	1	0	0	0	0 ▾
(Req. Authorization) What is the super secret password?:		asdf				
Mechanical Pencil	5535571	47	0	0	0	0 ▾
Pentel 1000	1668423	31	0	0	0	0 ▾

To refund one or more of each item, enter the quantity returned, then click Process Refund.

Process Refund

"New Quantity to Return" is the only editable field in the Process Refund section of the Fulfillment page if both "Allow Partial Refunds" and "Allow the Refunding of

Shipping" are set to No on the Store General Settings page.

- 4** For each item in the order, select the quantity of items to return from the New Quantity To Return dropdown list. The quantity that you enter for an item will be added to the inventory count for the product.

If partial refunds are allowed, please keep the following guidelines in mind:

- The "New Quantity to Return" field can be updated either with or without also entering a refund amount.
- The "Refund Amount" field can be updated either with or without also entering a quantity to return.
- Updating the "New Quantity to Return" field is optional and only relevant if the store tracks the inventory of the purchased item.

If partial refunds are NOT allowed, please keep the following guideline in mind;

- Updating the "New Quantity to Return" field is the ONLY way to initiate a refund for the cost of the purchased item.

If shipping refunds are allowed, please keep the following guideline in mind;

- You can initiate a shipping refund without also entering either a "New Quantity to Return" or a "Refund Amount."

- 5** (If applicable) Enter a purchase amount to refund in the Refund Amount field. You can enter a separate refund amount for each item in the order. (The "Refund Amount" field only appears if "Allow Partial Refunds" is set to Yes on the Store General Settings page.)

Please keep the following guidelines in mind:

- A purchase refund is possible if the amount displayed in the "Total amount available to refund" field is greater than zero.
- You cannot enter a dollar amount in the "Refund Amount" field that is greater than the value displayed in the "Total amount available to refund" field.
- The Refund Amount field is NOT a required field. That is, you can return items without refunding any amount to the customer.
- You can issue a refund without returning any items to inventory.

- 6** (If applicable) Enter a shipping amount to refund in the Refund Amount field of the order's shipping section. (This option only appears if "Allow the Refunding of Shipping" is set to Yes on the Store General Settings page.)

Please keep the following guidelines in mind:

- A shipping refund is possible if the amount displayed in the "Refundable Shipping Amt" field is greater than zero.

- You cannot enter a dollar amount in the "[Shipping] Refund Amount" field that is greater than the value displayed in the "Refundable Shipping Amt" field.
- 7 Click the Process Refund button.

7.7 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 left navigation menu. The Edit Profile page 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.

7.8 About Authorizing Credit Cards at Order Time

A Marketplace merchant (and all the stores under that merchant) can be set to use Marketplace's "Authorize Credit Card at Order Time" functionality. This functionality is available on the Add Marketplace Merchant page, as well as the Marketplace Merchant Settings page.

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 a credit card is encumbered, a hold is placed on the customer's credit card. The transfer of funds does not take place until a subsequent settlement request is received by the credit card processor. Until then, however, the customer's credit card will be encumbered for the full amount of the transaction. (Credit card settlement is the process by which authorized transactions are submitted to card issuers for payment.)

Orders that Require Fulfillment

During the fulfillment process, when credit card settlement takes place, the original authorization is used for the credit card settlement process (unless 72 or more hours have passed since the original authorization, in which case see "Automatic Authorization Cancellations" below).

Orders that use Auto Fulfillment

When Marketplace receives an order for a product that uses the Auto Fulfill option, Marketplace first sends an authorization request to Payment Gateway and immediately follows the authorization request with a settlement request (after Payment Gateway receives acknowledgement of the authorization and provides an identifying number).

Products that use the Auto Fulfill option do not go through the fulfillment process.

Automatic Authorization Cancellations

According to the policy requirements of credit card companies, an authorization that has not been settled must be canceled before 72 hours have passed. Accordingly, Marketplace will automatically cancel these authorizations before the time period expires.

Note: For schools with on-campus installations of Marketplace, the default time (in hours) in which credit card authorizations will be automatically cancelled can be modified by editing the `HoursToReverseAuthorizations` setting in the Admin *critical.prp* file. However, be sure to contact your credit card processor before changing this value. All customers in the TouchNet DataCenter are required to use the default 72 hour period.

When you fulfill an order that uses the "Authorize Credit Card at Order Time" option, the resulting actions taken by Marketplace (and Payment Gateway) depend on the number of hours that have passed. If the original authorization period has not elapsed, then the original authorization goes through the credit card settlement process.

If the original authorization period has passed, the order is still available for fulfillment. However, when the order is fulfilled, another authorization will be sent for the customer's credit card. As a result the credit card will be encumbered again (briefly), and immediately afterwards, the authorization will go through the settlement process.

8.0 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 392](#). These e-mail messages are sent in HTML format.

In addition to editing the messages described above, confirmation messages for recurring payments can be customized. These e-mail messages are sent in text format.

8.1 Examples of E-mail Messages

Here is an example of an order confirmation e-mail message:

You have received this email from tms65pd@touchnet.com in response to your Order.

Your on-line order (#192)

Thank you for shopping at YourCampus Shopping.

192:STORE_ORDER_ID
 Store:Campus Wear
 Date/Time:March 14, 2013 3:22:15 PM CDT
 Total:\$60.98

Ship To:
 John Doe
 15520 COLLEGE BLVD
 LENEXA, KS
 66219-1353
 United States

Payment Information:
 Payment Type:Credit Card
 Card Type:VISA
 *** Card Not Present ***

Shipping Information:
 Shipping Number:195
 Delivery Method:USPS Express Mail

Item	Stock Number	Quantity	Unit Price	Detail Total
T-Shirt with football logo : Large : Green	5148588_5	3	\$15.00	\$45.00
			Subtotal:	\$45.00
			Shipping:	\$11.00
			Tax:	\$4.98
			Total:	\$60.98

For questions, comments, or order status, send email to email_us and refer to Order 192.

Here is an example of a fulfillment e-mail message:

You have received this email from tms55pd@touchnet.com in response to your Order.

Payment Receipt

Thank you for shopping at YourCampus Shopping.
 This is the email order announcement text. This is the email order announcement text.

Payment:192
 Store:Campus Wear
 Date/Time:March 14, 2013 3:22:15 PM CDT
 Total:\$60.98

Billed To:	Ship To:
John Doe	John Doe
15520 COLLEGE BLVD	15520 COLLEGE BLVD
LENEXA, KS	LENEXA, KS
66219-1353	66219-1353
United States	United States

Contact Email:
gjohnson@touchnet.com

Payment Information:
 Payment Type:Credit Card
 Credit Card Number:xxxxxxxxxxx1111
 Card Type:Visa
 *** Card Not Present ***

Shipping Information:
 Shipping Number:195
 Delivery Method:USPS Express Mail

Item	Stock Number	Quantity	Unit Price	Detail Total
T-Shirt with football logo : Large : Green	5148588_5	3	\$15.00	\$45.00
			Subtotal:	\$45.00
			Shipping:	\$11.00
			Tax:	\$4.98
			Total:	\$60.98

For questions, comments, or order status, send email to email.us and refer to Order 192.
 Visit us on our web at [online here](#).

And here is an example of a refund-order e-mail message:

You have received this email from tms65pd@touchnet.com in response to refund.

Refund Information

This message is an automated notification to inform you that your refund was processed on March 14, 2013 3:20:13 PM CDT. Your credit card has been credited for a total of \$86.03.

Item	Quantity
T-Shirt with football logo : X Large : Green	3
Total: \$86.03	

All inquiries can be sent to tms65pd@touchnet.com, please refer to Order Number: 191

Thank you

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

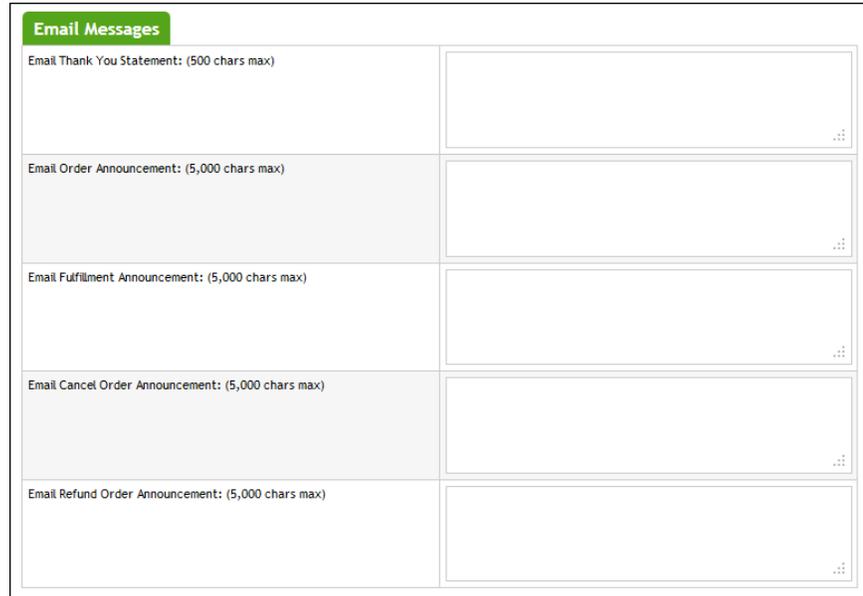
8.2 Editing E-mail Messages

You can add an announcement to three types of store e-mail messages: order confirmations, fulfillment confirmations, and cancellation 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 left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > General. The General Settings page appears.



Email Messages	
Email Thank You Statement: (500 chars max)	
Email Order Announcement: (5,000 chars max)	
Email Fulfillment Announcement: (5,000 chars max)	
Email Cancel Order Announcement: (5,000 chars max)	
Email Refund Order Announcement: (5,000 chars max)	

- 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 389](#)
- 3 The text that you enter in the Email Fulfillment Announcement field will appear near the top of fulfillment e-mail messages. These messages 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 389](#)
- 4 The text that you enter in the Email Cancel Order Announcement field will appear near the top of cancel-order e-mail messages. These messages are sent to customers after items in their orders have been canceled during the fulfillment process. 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 389](#)

- 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\marketplace\sys\tmsrecur`. Look for the following three files:

- `success_template.txt`
- `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 the 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.

8.3 uStores E-mail Addresses

The e-mail address that will be used as the "from" addresses for Marketplace uStores e-mail messages depends 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.

Message type	Uses this e-mail address ...
Order confirmation	Uses the "Store Contact Email Address" field on the Store General Settings page. If this field has not been configured for the store, then this value comes from the "Default email address for Contact Us link in mall footer" field on the Admin General Settings page. If the "Default email address for Contact Us link in mall footer" field has not been configured, then this value comes from the email.FromAddress parameter in the uStores critical.prp file.
Fulfillment confirmation	
Cancellation confirmation and refund confirmation	
Message generated by clicking the "Contact Us" link while viewing any store page	(The e-mail address in the <i>critical.prp</i> file was named when Marketplace was set up. If this address must be changed, you should contact your Marketplace administrator.)
Message generated by clicking the "Contact Us" link while viewing the mall home page, a mall product category page, a MyAccount page, a search page, a cart page, or a checkout page	Uses the "Default email address for Contact Us link in mall footer" field on the Admin General Settings page. If "Default email address for Contact Us link in mall footer" field has not been configured, then this value comes from the email.FromAddress parameter in the uStores critical.prp file. (The e-mail address in the <i>critical.prp</i> file was named when Marketplace was set up. If this address must be changed, you should contact your Marketplace administrator.)
Recurring payment confirmation (both uStores)	All recurring payment confirmations for all Marketplace merchants for uStores use the same "from" e-mail address. This e-mail address can be configured with the AliveCheck.mail.from field in the <i>tmsrecur.prp</i> 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:
Building and
Managing uPay Sites

9.0 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 configure 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 configurable, your uPay pages will be similar but not identical to our examples.)

9.1 An Overview of uPay

uPay is designed to be integrated with a campus web application. This campus web application can take 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.

uPay User Roles

The following user roles are available for uPay sites:

- Site Manager
- Payment Clerk
- Accountant

uPay User Roles

User Role	What They Can Do
Site Manager	<ul style="list-style-type: none"> • Manage the allowed payment methods • Configure the site to accept recurring payments • Configure site links and URLs • Configure e-mail announcement text • Configure uPay page titles and descriptive text • Configure additional donation offerings • Download, upload, and activate style sheets • Upload header, side banner, and footer images • Upload images for use with style sheets • Take uPay sites online or offline • Search for payments • Cancel/refund payments • Review Marketplace financial reports for the uPay site
Payment Clerk	<ul style="list-style-type: none"> • Search for payments • Cancel/refund payments
Accountant	<ul style="list-style-type: none"> • View Marketplace financial reports for the uPay site. <p>Note: Accountants cannot make any changes to uPay site settings or assign user roles.</p>

9.2 What uPay Customers See

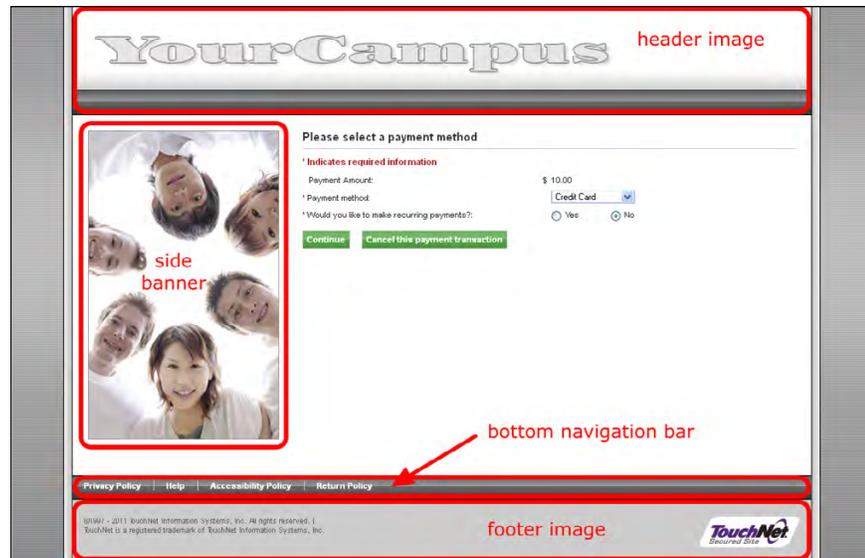
This section describes each of the uPay site pages that your customers will see and explains which parts of these pages are configurable.

All uPay Pages

The following notes describe the general site features that appear on all uPay pages:

- **Header image**—You can upload a header image. This image will appear at the top of all the uPay site pages.

- **Footer image**—You can upload a header image. This image will appear at the top of all the uPay site pages.
- **Side banner**—You can upload a header image. This image will appear at the top of all the uPay site pages.
- **Bottom navigation bar links**—You can enter the link text that will appear for the following three links in the bottom navigation bar: privacy policy, help, and accessibility. You can also turn on and off the display of these links.



These features appear on all uPay pages.

In addition to customizing a uPay site with image uploads, you can also modify the backgrounds, borders, font families, and much more that have been assigned to page elements by modifying the uPay site's style sheet. For more about style sheets, see ["uPay Style Sheets" on page 413](#).

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 as a heading, above the payment fields (e.g., "Please select a payment method").
- **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 451.

- **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. You can enter the text that will be used to ask customers whether they would like to make recurring payments.

The Additional Donation Page

If the uPay site has been configured to offer an "additional donation" option to the customer, this page appears with a description of the additional donation option and payment fields.

On the Additional Donation page, users can choose to make an additional donation to the described fund/cause.

For the Additional Donation page, you can also customize these features:

- **Name of the additional donation**—You name the donation fund/cause.
- **Prompt text displayed to the customer**—You enter the prompt text that will be displayed to the customer.
- **Description text**—You enter the description text that describes the donation fund/cause for customers.
- **Donation options**—You choose whether to display set donation amounts to customers or to use an entry box in which the customer can enter their own donation amount.

The Electronic Banking Information Page

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 as a heading, above the bank account fields (e.g., "Please enter your bank account information").
- **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.

Note: Depending on how Payment Gateway has been configured, requiring data may result in the failure of transaction with 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

This page allows the user to select the credit card type and enter the corresponding credit card information.

YourCampus

Please enter your credit card information

* Indicates required information

* Credit Card Type: MasterCard

* Account Number: [input field]

* Expiration Date: 04/2011

* Security Code (View example): [input field]

* Name on Card: [input field]

Billing Address of Credit Card

* Street Address 1: [input field]

* Street Address 2: [input field]

* City: [input field]

* State: Kansas (KS)

* Postal Code: [input field]

* Country: United States

* Email Address: [input field]

* Day Phone: [input field]

MasterCard VISA AMERICAN EXPRESS

Continue Cancel this payment transaction

Privacy Policy Help Accessibility Policy Return Policy

©1997 - 2011 TouchNet Information Systems, Inc. All rights reserved. | touchnet is a registered trademark of touchnet information systems, inc.

TouchNet
powered data

In the Credit Card Information page, users give credit card account information.

For the Credit Card Information page, you can customize these features:

- **Message text**—You create the message text that appears as a heading, above the credit card fields (e.g., "Please enter your credit card information").
- **Card Type**—When you set up the allowed payment methods, you choose which credit cards will 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, et.).
- **Card Verification Value**—You can require users to enter the card verification value. This number is printed on the credit card, usually above the signature area or above the imprinted number.

Note: Requiring data does not result in the failure of transactions for incorrect data.

- **Email Address**—You can require customers to enter an e-mail address.
- **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.

Note: Requiring data does not result in the failure of transactions for incorrect data.

The Recurring Payments Page

The Recurring Payments page allows the user to select the frequency of payments and the payment dates.

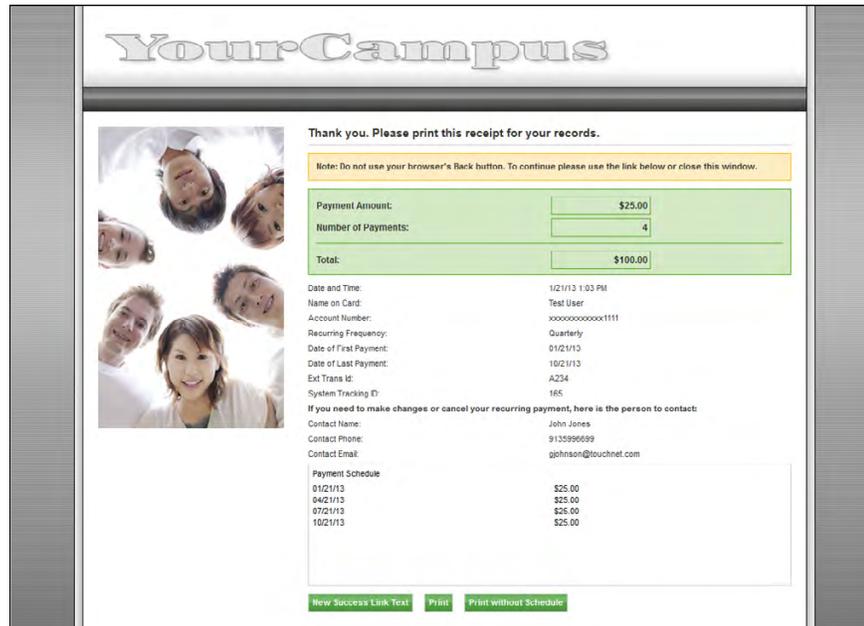
On the Recurring Payments page, the user confirms the payment amount, selects the frequency for the payments, and enters the beginning and end payment dates.

If the user enters a different amount here than the amount on the Payment Method Selection page, then the new amount will be used for all payments.

Note: The frequency, start date, and end date can be passed as input parameters to the uPay site from your application or web site. An additional input parameter determines whether the customer can modify the recurring payment values that are passed as input parameters. For more information, see **"Form Parameters" on page 451**.

For 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, bi-monthly, quarterly, semi-annually (twice a year), and annually.
- **Maximum duration**—The time period specified with the "Date of First payment" and "Date of last payment" fields must be equal to or less than the maximum duration specified in the configuration settings for the uPay site. If the customer enters a date range that exceeds the maximum duration, uPay will prompt the customer to modify the date range.



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 as a heading above the transaction information (eg., "Thank you. Please print this receipt for your records.>").
- **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.

9.3 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) the footer and side banner.

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 provides an overview of the available payment options.

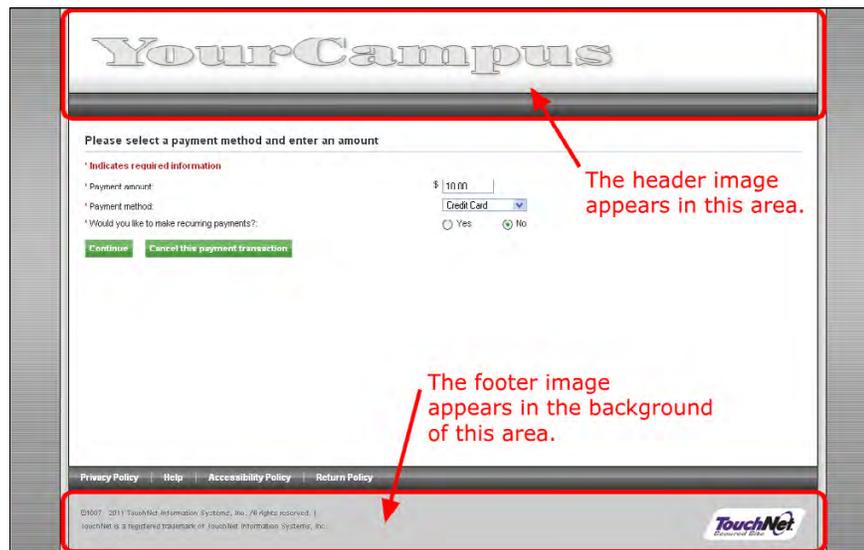
Types of Payment Options	Payment Options
Single payment options	<ul style="list-style-type: none"> • You set the default payment amounts, as well as minimums and maximums. • You choose the accepted payment methods. • You determine whether a dollar amount can be passed from a campus web application to 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 an encoded validation key is used with the parameters passed from a campus web application to your uPay site. • 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	<ul style="list-style-type: none"> • 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.
Posting options	<ul style="list-style-type: none"> • You determine whether a posting URL is used so that transaction parameters are passed to your campus web application. • You determine whether transaction parameters are passed to your campus web application when the customer clicks the uPay Cancel button.

Types of Payment Options	Payment Options
General ledger options	<ul style="list-style-type: none"> 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.
Payment prompts	<ul style="list-style-type: none"> You determine the text that appears beside the payment amount prompt. You determine the text that appears beside recurring payment prompt.

uPay Site Images

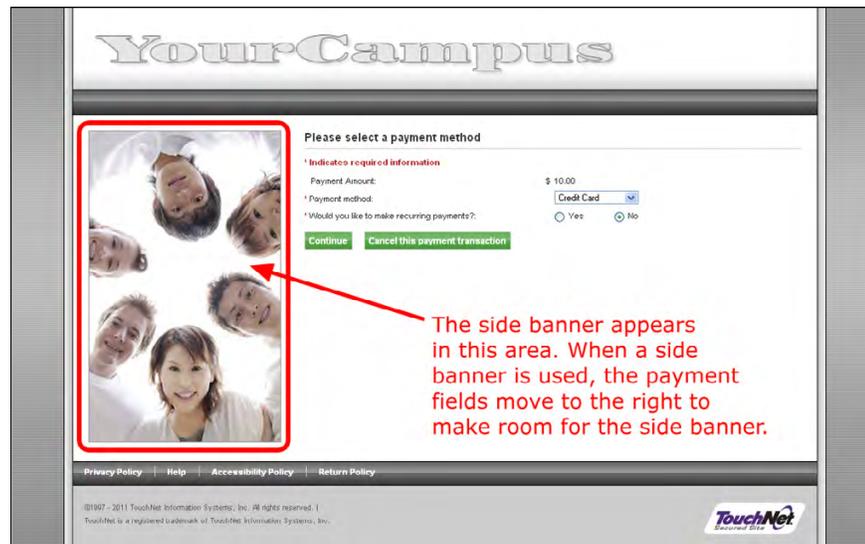
For each uPay site, you can upload a header image, a side banner, and a footer image. At a minimum, you should upload a header image. Space is reserved in the header for the header image. The recommended size of the header image is 960 pixels wide by 145 pixels high.

The footer image and side banner are optional. The recommended size of the footer image is 960 pixels wide by 80 pixels high. The recommended size of the side banner is 250 pixels wide by 400 pixels high.



You can upload a header image and footer image.

The header image might include the name of your campus organization and school, as well as a logo or a photo. The footer image appears behind the TouchNet copyright information and the TouchNet logo.



You can upload a side banner.

The side banner appears to the left of the payment fields. If you upload a side banner, an area 250 pixels wide is reserved for this image.

Before you create a uPay site, you should create a header image and ensure it is ready for upload. Likewise, you should consider whether to use a footer image and a side banner, and (if you will use these optional images) you should ensure that these images are ready for upload.

Note: You can create a uPay site without first creating a header image (or a footer image or a side banner); however, you should not bring the uPay site ONLINE until you have finished the site configuration by uploading the applicable images.

For details about uploading images, see ["uPay Site Images" on page 451](#).

uPay Style Sheets

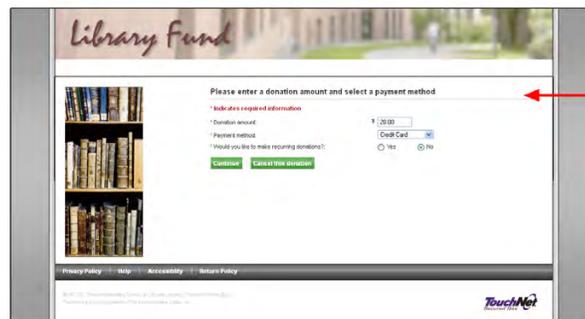
The look and feel of a uPay site is largely determined by the site's style sheet. Marketplace provides a default style sheet, which can be downloaded via the Operations Center. You can then modify the style sheet and upload your modified style sheet. (For more about downloading and uploading style sheets, see ["Style Sheet Modifications" on page 484](#).)

Style sheet modifications can be used to introduce campus branding strategies to uPay sites. By modifying the style sheet of a uPay site, you can change font families and sizes, you can add background colors, you can change button colors, you can change page justification, you can change the size of page elements, and much more.

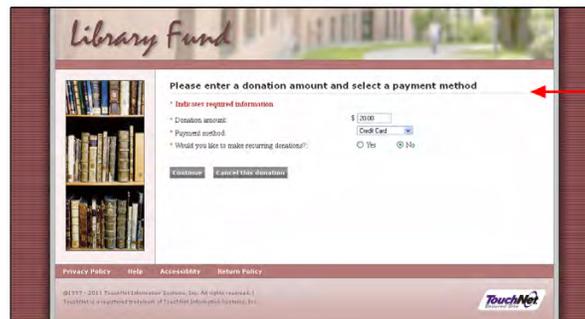
Here is an example that shows how the look and feel of uPay site can be modified.



Here is a uPay site with the default layout, before images have been uploaded or the style sheet modified.



Here is a uPay site with the default layout after a header image and a side banner have been uploaded, and before the style sheet has been modified.



And here is the same uPay site after style sheet modifications have been made. These modifications include background changes, font family changes, and font size changes.

Here is a list of some of the possible style sheet modifications:

- **Site justification and width**—By default, uPay site layout is centered with a fixed width. However, you can modify the style sheet so that a uPay site is left justified. You can also modify the width of the layout.
- **Body background**—By default, a gray background image is used. This background image is applied to the BODY tag and therefore appears behind the entire page. You can remove this image and apply a background color of your choice. Or you can uPay site
- **Header size**—By default, the header size is 960 pixels wide by 150 pixels high. However, you can modify the size of the header by editing the style sheet. If you make modifications to the header size, you'll need to take these modifications into consideration when you upload a header image.
- **Header background**—By default, the header image uses all of the space reserved for the header; however, the header size can be larger

than the header image, in which case the background of the header becomes visible. If you modify the style sheet, you can assign a background color or a background image to the header.

- **Main content background**—By default, a background image tiles in the main content background. This image includes a gray border on the far left and far right. The gray borders are important because they help demarcate the extent of the main content area. You can change the main background; however, any change to the main content background should take into consideration how the default image is used to set off the left and right borders.
- **Main content width and side banner width**—The side banner and main content area sit side by side, with the side banner area on the left and the main content area on the right. The side banner is approximately 250 pixels wide, although this width can be modified. If you change the width of the side banner, you can make a similar change (of opposite magnitude) to the main content width.
- **Font family and font size for main content**—The font family and font size (as well as the color) of text that appears in the main content area can be modified. You can assign different font family selections to the title text vs. the field label text. Several additional styles have been established for the various types of text that appear in uPay sites.
- **Button background**—By default, uPay site buttons are green with a gradient. If you would like to change the color (or background image) of the buttons or if you would like to change the button borders, you can modify the uPay style sheet. You can apply different backgrounds to different button states.
- **Font family and font size for buttons**—You can change the font family and font size of uPay buttons. If you change the font family or font size, you may find that you also need to modify the padding or margin.
- **Bottom navigation bar background**—By default, the bottom navigation bar is dark grey with a gradient. This background is applied via a background image. If you modify the style sheet, you can apply a different background color or image.
- **Bottom navigation bar size**—By default, the bottom navigation bar is 30 pixels high. If you make changes to the font size or family for the links in the bottom navigation bar (or to the padding), you may find that you need to modify the height of the bottom navigation bar.
- **Font family and font size for bottom navigation bar**—You can change the font family and font size of links in the bottom navigation bar. If you change the font family or font size, you may find that you also need to modify the padding or margin.
- **Footer background**—By default, the footer image uses all of the space reserved for the footer; however, the header size can be larger than the header image, in which case the background of the footer

becomes visible. If you modify the style sheet, you can assign a background color or a background image to the header.

- **Footer size**—By default, the footer size is 960 pixels wide by 120 pixels high (which includes the bottom navigation bar). However, you can modify the size of the footer by editing the style sheet. If you make modifications to the footer size, you'll need to take these modifications into consideration when/if you upload a footer image.
- **Borders**—Borders are applied to several of the page elements, such as the content area, the header, buttons, the bottom navigation bar, and the footer. You can modify the width and color of borders (or eliminate borders entirely).

To help you learn about the various page elements that comprise the uPay site layout, we strongly recommended that you use a tool such as Firebug with Firefox or Developer Tools with Internet Explorer. These tools allow you to quickly identify the ID names and class names of DIVs and other page elements.

Messages and Titles

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 and the title text that appears in the title bar of the customer's browser.

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.

A sample page with message above the entry fields.

The following uPay pages have messages and titles that can be modified:

- The Payment Method Selection page
- The Credit Card page

- The Electronic Banking page
- The Receipt page.

Marketplace provides default message text and title text; however, you may discover that your uPay site has specific needs that must be addressed by modifying the default text. You should plan for these modifications and make the required edits before you bring your uPay site online.

For details on entering messages and titles, see "[Messages and Titles](#)" on [page 446](#)

Bottom Navigation Bar

The following links appear in the bottom navigation bar of uPay sites:

- Privacy Policy
- Help
- Accessibility Policy
- Return Policy

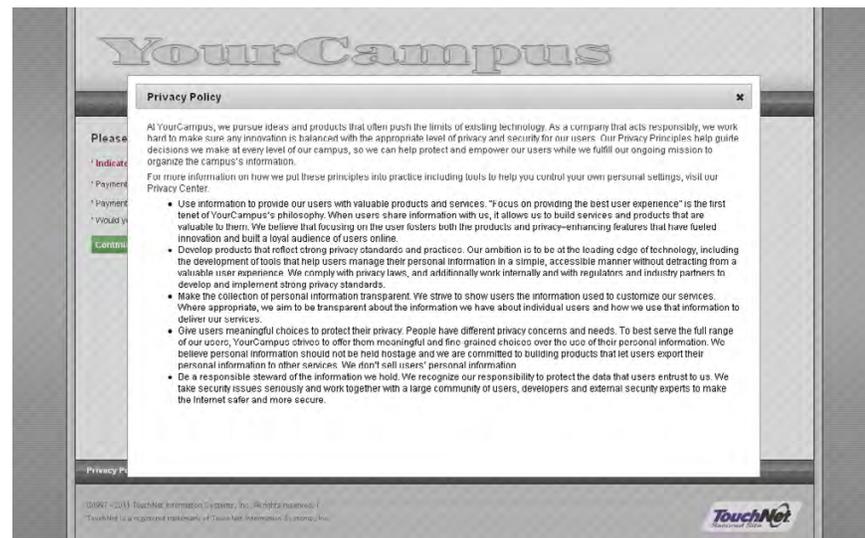
These links are optional, except for Return Policy, which always appears.

Marketplace gives you the ability to modify the text used for each text link in the bottom navigation bar.



A sample bottom navigation menu with default link text.

When one of these links is clicked, a modal window appears that contains descriptive text. You can configure your uPay site by entering the descriptive text.



A sample privacy policy page.

The following table describes the functionality of the bottom navigation menu links:

Link name	Optional?	Link can be Modified?	Can it target a URL?	Can use a modal window?
Privacy Policy	Yes	Yes	Yes	Yes
Help	Yes	Yes	Yes	Yes
Accessibility Policy	Yes	Yes	Yes	Yes
Return Policy	Yes	Yes	No	Yes

For details on the bottom navigation bar links, see **"Miscellaneous: Links, URLs, and E-mail" on page 436.**

Button Links

You can customize the text that appears on most button links used by your uPay site. In addition, for each of these button links—except for the Continue button—you must enter a URL that will be targeted when the user clicks the corresponding button. Here are the button links you can customize:

Button	Description
Continue	The Continue button appears throughout the uPay payment page. You can modify the text that appears on this button.
Success	After the customer has submitted their payment, the Receipt page appears. The success button is positioned near the bottom of this page. You can use this button to give customers a short message that they can click on to navigate away from the uPay site. In addition, you can specify the URL that is targeted by this link. For example, you might use this link to point the customer back to your campus web application.
Error	If a system failure is encountered, you can use the link on the error page to route the customer to an appropriate destination on the campus web application. You can also specify the text that appears on this button.
Cancel	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. You can also specify the text that appears on this button.

Be sure to modify these button links before you bring your uPay site online.

For more information about button links, see **"Miscellaneous: Links, URLs, and E-mail" on page 436.**

Additional Donations

Finally, after you have created a uPay site, you can add the ability for the uPay site to offer an additional donation option to the customer. This feature is a great way to introduce customers to a specific donation option. For example, while customers are making a payment for a parking pass or a dormitory rent deposit, you can provide these customers with the option of contributing to a library fund or an alumni fund. By providing increased exposure to these funds, you may increase the amount of revenue that these funds take in.

Once the Additional Donation feature is configured for a uPay site, all customers who visit this uPay site will see the additional donation option.

To configure a uPay site for the additional donation option, you need the following information:

- a name for the donation,
- the prompt text that customers will see (e.g., "How much would you like to contribute to the Library Fund?"),
- a description of the donation (so they will better understand the nature of the cause),
- the payment fields to display to the customer (either set amounts that can be selected by choosing a radio button or an entry field that the customer can use to enter a specific amount), and ...
- (optional) an image to appear on the Additional Donation page.

For more information about the additional donation option, see **"Additional Donations" on page 453**.

10.0 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 410 and "What uPay Customers See" on page 401 .)
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 "Using Marketplace to Create a uPay Site" on page 423 .)
Linking to your uPay site	Set up your campus web application to pass transaction parameters to your uPay site. (See "Passing Parameters to Your uPay Site" on page 456 .)
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 "Using the VALIDATION_KEY Option" on page 469 .)
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 10.5 , "Using a Posting URL" on page 475 .)
Bringing your uPay site online	Use Marketplace to make your uPay site active and start receiving payments. (See "Bringing Your uPay Site Online" on page 482 .)

10.1 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 left navigation 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 , "Merchant Accounting Codes" on page 147.

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 "**Planning Ahead for uPay**" on page 410 and "**What uPay Customers See**" on page 401.

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 "**Passing Parameters to Your uPay Site**" on page 456 and "**Using a Posting URL**" on page 475.

10.2 Using Marketplace to Create a uPay Site

To create a new uPay site, a merchant manager uses 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. The following subsections describe each page in the create-a-new-uPay-site process. These pages include:
 - Payment settings
 - Recurring payments
 - Miscellaneous settings
 - Messages and titles
 - User settings
 - Settings validation
 - Form parameters
 - Custom image upload

After you have completed these pages, a Marketplace site will have been created. However, the configuration may not be complete, as described in the following steps.

- 3 Download the uPay style sheet and make any necessary modifications. Then upload the style sheet.
- 4 Work with the administrator of the associated web application so that configuration is completed. This work may involve the passing of parameters from the web application to uPay (and accompanying configuration in uPay, if necessary). It may involve the use of a validation key with the input parameters. It may involve configuration for a posting URL.
- 5 After you have made all the necessary modifications to the uPay site, you can bring the site online.

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.

Donations: Payment Settings		Print Page 
Users see the Payment Amount prompt before the dollar amount field. The ACH Shared Secret prompt describes any validation you require for ACH payments.		
General Settings		
Site Id:	0	
T-Link Settings		
Site uses T-Link:	<input type="radio"/> Yes <input checked="" type="radio"/> No	
T-Link Web Service URL:	<input type="text"/>	
Partner Name:	<input type="text"/>	
Accounting Settings		
Perform General Ledger Updates:	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Cashier ID	<input type="text"/>	
Accounting Code:	General Alumni <input type="text"/>	
Payment Settings		
Passed Amount Validation Key enforces tighter security when passing an amount from your application. Applies if the amount is passed in and site does not use T-Link		
Require encoded validation key for amount:	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Passed Amount Validation Key:	<input type="text"/>	
Allow the amount to be passed in:	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Payment Amount can be changed:	<input checked="" type="radio"/> Yes <input type="radio"/> No	
All payment amounts are in USD (\$)		
Default Payment Amount (Example: 1234.56)	10 <input type="text"/>	
Minimum Payment Amount:	1 <input type="text"/>	
Maximum Payment Amount:	<input type="text"/>	
Payment Amount Prompt:	Donation amount <input type="text"/>	

Field Definitions:

General Settings

Site ID

Display only. A uPay site ID is assigned when a uPay site is established. In order to launch a uPay site, a uPay site ID must be passed as a form parameter.

T-Link Settings

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.

Partner Name

If you selected Yes for "Site uses T-Link," you must select a partner from the Partner Name drop-down list. This partner name will appear beside the uPay site name and ID on the Marketplace home page and on the TouchNet Ready Dashboard page in U.Commerce Central. The partner name will also appear on the Marketplace GL Exceptions page and the Marketplace Posting Exceptions page.

Accounting Settings**Perform General Ledger Updates**

Select Yes to activate general ledger reporting for your uPay site.

Important! If you are considering selecting Yes for Perform General Ledger updates, **please see "General Ledger Information" on page 507 for detailed information on general ledger configuration.** The "General Ledger Information" section contains critical information for each supported general ledger system. You will NOT be able to complete general ledger configuration without following the instructions in the "General Ledger Information" section.

Note: This field only appears for merchant managers and uPay site managers.

Cashier ID

For Banner by Ellucian customers, the Cashier ID field appears. For information about this field, see "[Configuring uPay Settings](#)" on page 522.

Tender GL Dist Code

For Colleague by Ellucian customers, the Tender GL Dist Code field appears. For information about this field, see "[Configuring uPay Settings](#)" on page 549.

Accounting Code

If you select the "Perform General Ledger Updates" checkbox, you must make a selection from the Accounting Code drop-down list. This field lists all the accounting codes that are available for this uPay site to use. For more information, choose your general ledger system: [Banner](#), [Colleague](#), or [PeopleSoft](#).

Payment Settings**Require encoded validation key for amount?**

This option allows uPay to validate the dollar amount that is passed to a uPay site. This validation is accomplished through the use of an encoded validation key (the VALIDATION_KEY input parameter), which can be passed by the campus web application once the "Require encoded validation key for amount?" option is set to Yes.

This option requires that the campus web application generates the encoded validation key value according to specific guidelines. See "[Creating a VALIDATION_KEY](#)" on page 472 for details on creating the validation key. This option is not available if you chose Yes for "Site uses T-Link."

Important! If the uPay site has been configured to accept a passed amount from the campus web application, TouchNet recommends that the VALIDATION_KEY parameter also be passed. The use of an encoded validation key helps to ensure the integrity of amounts that are passed to uPay.

When "Require encoded validation key for amount?" is set to Yes, the following actions also must be taken:

- You must enter a "Passed Amount Validation Key" value on the uPay Payment Settings page.
- You must select Yes for "Allow the amount to be passed in?" on the uPay Payment Settings page.

- The campus web application must pass a dollar amount as an input parameter. (For more information, see ["uPay Parameter Details" on page 456.](#))
- The campus web application must pass an external transaction ID (EXT_TRANS_ID) as an input parameter. (For more information, see ["uPay Parameter Details" on page 456.](#))
- The campus web application must pass an encoded validation key (VALIDATION_KEY) as an input parameter. (For more information, see ["Creating a VALIDATION_KEY" on page 472](#))

If any part of this configuration has not been completed, uPay will not accept the payment.

Passed Amount Validation Key

The "Passed Amount Validation Key" is for use with the VALIDATION_KEY option. The VALIDATION_KEY is an input parameter that is used to help ensure the integrity of payment amounts that are passed to uPay by campus web applications.

If you use the VALIDATION_KEY option (which can be turned on by selecting Yes for "Require encoded validation key for amount?" on the uPay Payment Settings page), then you must enter a value in the "Passed Amount Validation Key" field.

In turn, the value that you enter in the "Posted Amount Validation Key" field must be used by the campus web application when it creates the VALIDATION_KEY value. For more information about using the "Passed Amount Validation Key" and the VALIDATION_KEY option, see ["Using the VALIDATION_KEY Option" on page 469.](#)

Allow the amount to be passed in

If you select Yes, the uPay site will accept a transaction amount passed by the campus web application. If the uPay site has been configured with a Default Payment Amount, the amount that is passed by the campus web application will override the default amount.

Important! If you turn this option on, TouchNet recommends you also use the encoded validation key described below. For more information, see ["Using the VALIDATION_KEY Option" on page 469.](#)

Note: For more details about passing data to uPay, see ["Form Parameters" on page 451.](#)

Payment Amount can be changed

If you select Yes, the user can change either your default payment amount or the amount that has been passed from your application.

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 set minimum and maximum payment amounts. These amounts only apply if the "Allow the user to edit the payment amount" field is set to "Yes." If the user is not allowed to edit the payment amount, the Minimum Payment Amount field and the Maximum Payment Amount field have no affect.

If you have entered minimum and maximum payment amounts AND you selected Yes for "Allow the user to edit the payment amount," then customers will see the following effects: if the customer enters a value that is below the minimum or above the maximum, the customer will be prompted to change the payment amount.

You can leave either or both the minimum and maximum fields empty.

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."

Validation Settings	
Require address verification for credit card payment:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Require the credit card security code:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Require address for campus card:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Require pin number for campus card:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Require address for ACH payment:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Require bank account number to be entered twice: (applies for ACH only)	<input checked="" type="radio"/> Yes <input type="radio"/> No
ACH Shared Secret Prompt:	<input type="text"/>
CAPTCHA can be used to help prevent internet bots from making payments.	
Require user to respond to CAPTCHA before the payment can be completed?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Example:	
Optional Prompts	
Show email address prompt:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Require email address:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show day phone prompt:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Show night phone prompt:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Show mobile phone prompt:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Transaction ID Settings	
External Trans Id must be passed	
Show External Transaction Id in email:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Show External Transaction Id in URL:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Validate External Transaction Id is unique to this uPay Site:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Allow reuse of Cancelled External Transaction Id:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Accepted Payment Methods	
<input type="checkbox"/> AmEx <input type="checkbox"/> Discover <input type="checkbox"/> MasterCard <input type="checkbox"/> Visa <input checked="" type="checkbox"/> webCheck	
<input type="button" value="Save"/>	

Validation Settings

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 security code?

If you select Yes, the user must enter this value. The credit card security code 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 address for campus card?

If you select Yes, customers using a campus card for payment will be asked to enter the address of the cardholder.

Require pin number for campus card?

If you select Yes, customers using a campus card for payment will be asked to enter their pin number. This field works much like the credit card security code field.

Require address for ACH Payment

If you select Yes, the user will be required to provide a street address, city, state, and ZIP code.

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.

ACH 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 451](#).

Note: To use the shared secret value, you must 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 451](#). 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.

Require user to respond to CAPTCHA before the payment can be completed?

When Yes is selected, the customer will see a CAPTCHA challenge prompt at the beginning of the payment process (on the Payment Method Selection page of uPay). The customer must enter the displayed code before they can continue. CAPTCHA can be used to help prevent Internet bots from being

used to initiate uPay transactions, as bots cannot typically interpret CAPTCHA codes. Use of this field may be particularly relevant when a uPay site is being used to accept payments for a high-demand purpose, such as parking places or a ticketed event.

Optional Prompts

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. This e-mail address will also be used when recurring payments take place. In addition, if any payments must be refunded, an e-mail message will be sent to this e-mail address. 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?

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 site and pre-populate uPay's e-mail address field with the user's e-mail address. For more information on passing parameters to uPay, see "[Form Parameters](#)" on page 451.

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 day/night/mobile phone prompt?

If you select Yes, customers will see a prompt for the corresponding telephone number.

Transaction ID Settings

Show External Transaction ID in E-Mail?

If you select Yes, customers will see the external transaction ID in success 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.

Validate External Transaction ID is unique to this uPay site?

If you select Yes, uPay will require that an external transaction ID is passed by the campus web application. This external transaction ID must be unique. uPay will validate that the submitted external transaction ID has not previously been used by this uPay site (however, this external transaction ID CAN be used by other uPay sites). If the value is not passed, or if the value is not unique, the customer will receive an error message.

Allow reuse of Cancelled External Transaction ID?

If "Validate External Transaction ID is unique to this uPay site" is set to Yes, Marketplace uPay will require that a unique external transaction ID be passed to the site. Resultingly, after a transaction has been cancelled, some schools may wish to reuse the corresponding external transaction ID. Select Yes for "Allow reuse of Cancelled External Transaction ID?" in order to reuse external transaction IDs for cancelled transactions.

Accepted Payment Methods

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.

Campus cards and Interac can be used as payment methods for uPay sites; however, campus cards and Interac are not available with T-Link.

Notes on Payment Methods

Marketplace uPay accepts credit cards, campus cards, Interac Online, and electronic check (ACH). The payment methods that are available for a uPay site depend on the configuration of the Payment Gateway host system account that is used by the corresponding Marketplace merchant.

Credit cards accepted by Marketplace:

Credit Card Name	Name Displayed to Buyers
MasterCard	MasterCard
Visa	Visa
American Express	AmEx
Discover Card	Discover

Credit Card Name	Name Displayed to Buyers
JCB	JCB
Diners Club International	DinersClub
Carte Blanche	CarteBlanche
China UnionPay	ChinaUnionPay
DinaCard	If these cards are accepted, customers will see icons for these cards on the uPay payment pages, but these customers will not see separate payment method selections for DinaCard and BC Card. To use these cards, cardholders must select Discover.
BC Card	

The credit card names displayed to customers are predefined in Payment Gateway and are not editable.

uPay site managers determine which payment methods to use. For example, a host system account might be configured for MasterCard, Visa, American Express, and ACH, but a uPay site might be configured to only use MasterCard and ACH (a subset of the available payment methods).

Marketplace displays icons for each available payment method on the Credit Card Information page. If Discover is selected as an accepted payment method for a uPay site, customers will also see icons for DinaCard and BC Card, according to Discover Network requirements.

Important! The Discover Network requires that all merchants that accept the Discover Card must also accept Diners Club, JCB, Carte Blanche, and China UnionPay. For details, please check your agreement with the Discover Network. When you set up the allowed payment methods for a uPay site, you should keep this requirement in mind.

Campus cards accepted by Marketplace:

Campus Card Name	Name Displayed to Buyers
CBORD	Configurable in Payment Gateway
Blackboard	

When these campus cards are configured in Payment Gateway, the name that will be displayed to customers can be configured. For example, if the school wants to use the name "State University Card," then this name can be entered on the Payment Methods page in Payment Gateway.

Interac Online is also available as a payment method for uPay sites. Interac Online can only be used by Marketplace merchants that use Canadian banks. Customers will see this payment method listed as "Online Payment

via INTERAC." Buyers will also see the Interac Online icon, a trademark statement, and a link named "Learn More" that links to www.interaonline.com.

Electronic check (ACH) appears as "webCheck" in the Marketplace Operations Center; however, this payment method appears as "Electronic Check (ACH)" to uPay customers.

Recurring Payments

The third uPay setup screen is the Recurring Payments screen. Here, you configure the options that allow customers to set up scheduled recurring payments.

Donations Recurring Settings

If users should make one-time payments only, set the first option to No and do not set other options.

Recurring Payments Settings

Allow Recurring Payments:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Prompt Displayed to User Asking if Recurring Payments are Desired:	Would you like to make recurring donations?
Maximum Duration:	4 <input type="text"/> Years <input type="button" value="v"/> (99 years max)
Accepted Frequencies:	
<input type="checkbox"/> Weekly	
<input checked="" type="checkbox"/> Monthly	
<input type="checkbox"/> Bi-Monthly	
<input checked="" type="checkbox"/> Quarterly	
<input type="checkbox"/> Semi-Annually	
<input type="checkbox"/> Annually	
ACH Agreement Text for Recurring Payments: (HTML Allowed)	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.
Contact Information for Users who Create Recurring Payments:	
Name:	John Jones
E-Mail Address:	gjohnson@touchnet.com
Phone Number: (Example: 123-456-7890)	9135996699

To enable recurring payments for a uPay site, be sure to select Yes for "Allow Recurring Payments" (the first option on the Recurring Payments page) and complete the additional setup fields.

The Campus web application can pass parameters that establish the configuration values for scheduled recurring payments. These parameters allow for the following information to be sent:

- frequency
- start date
- end date
- total number of payments

- and a parameter that determines what uPay will do if the customer's credit card expiration date comes before the last scheduled recurring payment

In addition, the TouchNet Ready Partner's web application can pass a parameter that determines if the customer can make modifications to the values that are passed (such as the frequency, the start date, and the end date).

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.

Prompt Displayed to User Asking if Recurring Payments are Desired

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 99 years. If you leave the number field empty, the maximum duration will be 99 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 for Recurring Payments

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 for Users Who Create Recurring Payments

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 users because it provides them with a contact if they want to change or cancel recurring payments. uPay does not provide self-service options where users can change or cancel their own recurring payments.

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.

New uPay site: Miscellaneous Settings

Use success, error, cancel, and privacy links to direct users to your pages.

[Delete Site](#)
Print Page

General Settings

Site Id:	20
Site Status:	Enabled ▼
Site Offline Message: (500 characters max)	<div style="border: 1px solid #ccc; height: 30px;"></div>
Site Name:	<input type="text" value="New uPay site"/>
Site Email Address:	<input type="text" value="tom.joad@touchnet.com"/>

Posting Settings

To have payment results and other useful data posted to your application, use the Posting URL. This URL is not used to navigate the user's browser. It is used only to update your application.

Post data when payment is cancelled:	<input type="radio"/> Yes <input checked="" type="radio"/> No
User must wait for post completion:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Mark post as failed after number of seconds:	<input type="text"/>
Posting URL:	<input type="text"/>
Additional posting value can be passed as an identifier for post-back validation.	
Additional Posting Value:	<input type="text"/>

Email Settings for Payer Message

Send Payment Notification Email to Payer:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Notification Confirmation Announcement: (5,000 chars max)	<div style="border: 1px solid #ccc; height: 60px;"></div>
Refund Announcement: (5,000 chars max)	<div style="border: 1px solid #ccc; height: 60px;"></div>
Cancel Announcement: (5,000 chars max)	<div style="border: 1px solid #ccc; height: 60px;"></div>

Field Definitions:

General Settings

Site ID

Display only. A uPay site ID is assigned when a uPay site is established. In order to launch a uPay site, a uPay site ID must be passed as a form parameter.

Site Status

This dropdown menu contains two values: Enabled and Disabled. When a uPay site is first created, the site has a status of Disabled. In order for customers to start using the uPay site, you must change the status to Enabled.

Site Offline Message

This message will be displayed when a user attempts to use the uPay site and the site's status is Disabled. This field accepts a maximum of 500 characters. HTML is not allowed in this field.

Site Name

The site name will appear in the Operations Center left navigation menu and in reports. It will not be shown to the user who makes payments through the site.

Site E-mail Address

Used as the contact e-mail address on e-mail confirmation messages to the customer. In addition, warning messages for posting URL failures, GL update failures, and recurring payment failures are sent to this e-mail address.

Posting Settings

Post data when payment is cancelled

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 T-Link" on the uPay Payment Settings page.

User must wait for post completion

If the campus web application does not respond after the specified period of time (see the next field), uPay will continue to the receipt page. If the maximum wait period is reached, the posting will be marked as failed in Marketplace.

Mark post as failed after number of seconds

This field represents the maximum number of seconds that uPay will wait for the campus web application to respond to posting data. If the campus web application has not responded after this period of time, uPay will continue to the receipt page. If the maximum wait period is reached, the posting will be marked as failed in Marketplace.

Posting URL

After a transaction is processed (or recurring payments are established), uPay can pass parameters describing the transaction back to a campus web application. These parameters can be passed by uPay with the use of a "Posting URL." If you would like for the output parameters to be passed to a campus web application, you must enter the URL for that destination in the "Posting URL" field. For more information, see ["Using a Posting URL" on page 475](#).

Note: TouchNet strongly recommends use of https with the Posting URL.

Additional Posting Value

The "Additional Posting Value" is a value that can be optionally passed by uPay to the posting URL. Some schools use this field to pass a value that identifies the uPay site and can be verified with the web application that utilizes the posting URL. As a result, this value can be used to help ensure the integrity of the transaction information that is being passed to the posting URL.

Note: The parameter sent to the posting URL is named `posting_key`.

Important! The "Additional Posting Value" should not be considered an alternative to using the `VALIDATION_KEY` option. The "Additional Posting Value" uses a static value that is NOT encoded—and it's used AFTER uPay has processed the transaction. However, the `VALIDATION_KEY` option uses a dynamic value that IS encoded—and it's used when the transaction amount is initially passed to uPay—therefore, providing a much higher level of transaction integrity. If you would like to use an "Additional Posting Value," we strongly recommend you use this value in conjunction with the `VALIDATION_KEY` option and NOT as an alternative to the `VALIDATION_KEY` option. For more about the `VALIDATION_KEY` option, see ["Using the VALIDATION_KEY Option" on page 469](#).

Email Settings for Payer Message

Send Payment Notification Email to Payer

Payment notification e-mail messages are sent by default when uPay transactions take place. However, if these messages are not relevant for your uPay site, you can choose No to turn off these messages. If, for example, you're using a campus web application to initiate the uPay transactions and this web application receives uPay transaction information via a posting URL, then the web application could possibly generate its own payment notification e-mail messages, and therefore the uPay payment notification e-mail messages might be considered redundant.

On the other hand, TouchNet Ready Partner web applications typically send their own payment notification e-mail messages; however, if the web application does not have this functionality, "Send Payment Notification Email to Payer" can be set to Yes and uPay will then send payment notification e-mail messages.

Notification Confirmation Announcement

The text entered in this field will appear on e-mail confirmation messages. This announcement will appear after the payment details section. It will appear on confirmation messages generated for single payments as well as recurring payments. This field accepts a maximum of 5,000 characters. HTML is not allowed in this field.

Refund Announcement

The text entered in this field will appear on e-mail refund messages. This field accepts a maximum of 5,000 characters. HTML is not allowed in this field.

Cancel Announcement

The text entered in this field will appear on e-mail cancellation messages. This field accepts a maximum of 5,000 characters. HTML is not allowed in this field.

Success Link Settings	
The Success Link appears after a successful payment. It navigates back to the calling application.	
Success Button Label:	<input type="text" value="Continue"/>
Success Link URL:	<input type="text"/>
Success Text (50,000 chars max): (HTML Allowed)	<input type="text" value="Success Text: Thank you for your payment."/>
Error Link Settings	
The Error Link is used only for system failures. For payment method entry errors, the user may re-enter payment data.	
Error Button Label:	<input type="text" value="Retry"/>
Error Link URL:	<input type="text"/>
Error Text (50,000 chars max): (HTML Allowed)	<input type="text" value="Error Text: We're sorry, an error has occurred, please try again."/>
Cancel Link Settings	
The Cancel Label is displayed on Cancel Button. It navigates back to the calling application.	
Cancel Button Label:	<input type="text" value="Cancel"/>
Cancel Link URL:	<input type="text"/>
Continue Link Settings	
Continue Button Label:	<input type="text" value="Continue"/>
Return Policy Settings	
Disabling this feature removes the return policy from the footer and the return policy text at checkout.	
Show Return Policy Link:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Return Policy Link Label:	<input type="text" value="Return Policy"/>
Return Policy Text (50,000 chars max): (HTML Allowed)	<input type="text"/>

Success Link Settings

Success Button Label

The Success Button Label appears as a button on the receipt page. This button text is hyperlinked with the URL that you provide in the "Success Link URL" field. The Success Link field does not appear if you selected Yes for "Site uses T-Link" on the uPay Payment Settings page. By default, this field originally contains the following text: "Thank you for your payment."

Click here to continue."; however, you are in control of this value and can modify the button text.

Success Link URL

If you chose No for "Site uses T-Link" on the uPay Payment Settings page, this field indicates where the customer will be directed when they select the Success Link button on the uPay receipt page. To determine the value for this field, you should contact the administrator of the campus web application that is using uPay. This field must contain a URL that points at a location in the campus web application (or at another logical destination for the customer). This field does not appear if you selected Yes for "Site uses T-Link" on the uPay Payment Settings page.

Customers are not required to click the Success Link button. The payment process has been completed by the time the Success Link button appears on the uPay receipt page. Therefore, the campus web application should not depend upon customers clicking the Success Link button. To pass payment parameters to the campus web application at the conclusion of the payment process, you should use a Posting URL (not the Success Link URL), as described in ["Using a Posting URL" on page 475](#).

Return Link URL

This field only appears if you selected Yes for "Site uses T-Link" 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.

Success Text

The Success Text appears in a box near the top of the uPay receipt page. You can use this text to convey a message to the customer. The Success Text field does not appear if you selected Yes for "Site uses T-Link" on the uPay Payment Settings page. By default, this field originally contains the following text: "Thank you for your payment."; however, you are in control of this value and can modify the text. This field accepts a maximum of 50,000 characters. HTML can be used in this field to format the Success Text message.

Error Link Settings

Error Button Label

If a Marketplace/uPay system failure takes place, a message (the Error Text field) appears on the error page, and a button (the Error Button Label field) that can be clicked to continue. The button targets the URL provided by the Error Link URL field. You can customize the text that appears on this button by entering a value in the Error Button Label field. By default, the button says Retry.

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 T-Link" 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.

Error Text

The Error Text appears in a box near the top of the uPay error page. You can use this text to convey a message to the customer. By default, this field originally contains the following text: "We're sorry. An error has occurred. Please try again."; however, you are in control of this value and can modify the text. This field accepts a maximum of 50,000 characters. HTML can be used in this field to format the Success Text message.

Cancel Link Settings**Cancel Button Label**

A "Cancel" button appears throughout the uPay payment pages. You can modify the text that appears on this button by changing the value in this field. By default, this field originally contains the word "Cancel"; however, you are in control of this value and can modify the button text.

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 T-Link" 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.

Continue Link Settings**Continue Button Label**

A "Continue" button appears throughout the uPay payment pages. Customers will select this button to record their entries on each page. You can modify the text that appears on this button by changing the value in this field. By default, this field originally contains the word "Continue"; however, you are in control of this value and can modify the button text.

Return Policy Agreement Settings

Show Return Policy Agreement

By default, the Return Policy Agreement for your uPay site will be displayed to customers on the Verify Your Payment Information page. However, if display of the Return Policy Agreement is not appropriate for your uPay site, you can turn off the display of the Return Policy Agreement by selecting No for the Show Return Policy Agreement option.

Return Policy Agreement

Last updated: August 19, 2011

Welcome to Campus Wear. Campus Wear and/or its affiliates provide website features to you subject to the following conditions. **If you visit or shop here, you accept these conditions.** Please read them carefully. In addition, when you use any current or future Campus Wear service or business (e.g., Your Profile, Gift Cards, Unbox, or Your Media Library) you also will be subject to the guidelines, terms and agreements ("Terms") applicable to such service or business. If these conditions are inconsistent with such Terms, the Terms will control. When you visit Campus Wear or send e-mails to us, you are communicating with us electronically. You consent to receive communications from us electronically.

PRIVACY

By clicking Continue, I agree to the above Return Policy

The Return Policy Agreement appears on the Verify Your Payment Information page of uPay. For uStores, you can turn off the display of the Return Policy Agreement.

The display of a return policy is typically required by credit card regulations. However, if your uPay site does not accept credit cards, or if the credit cards that you accept do not require the display of a return policy, then you may consider disabling the display of a Return Policy Agreement.

Important! Before you choose No for the Show Return Policy Agreement option, we strongly recommend that you contact your credit card processor about credit card regulations and determine whether display of the return policy is required.

Return Policy Label

The words "Return Policy" appear in the header for the Return Policy Agreement that appears on the uPay Verification page. These words also appear in the "By clicking ..." message that appears immediately below the Return Policy Agreement text. You can change this text by entering a new value in the Return Policy Label field.

Please verify your payment information

Amount:	\$20.00
Date and Time:	9/25/14 11:34 AM
Name on Card:	John Doe
Account Number:	xxxxxxxxxxxx1111

[Change Payment Information](#)

Return Policy Agreement

The Return Policy Label appears in these locations on the uPay Verification page.

Return Policy Agreement Text. Special orders are non-returnable. Regular orders can be returned within 7 days of receipt in their original packaging and in the case of jewelry, in unworn condition. Please notify the gallery by phone or email before the return. The client is responsible for returning the item(s) pre-paid and insured to the Gallery. Credit issued will not include original shipping and insurance charges. We reserve the right to not accept a return and may require a re-stocking or repair fee if the item has been at all damaged or worn. While our policies are firm for obvious reasons, we will do everything we can to work with you and make sure your experience with is positive.

By clicking Continue, I agree to the above [Return Policy](#)

[Continue](#) [Print Agreement](#) [Cancel](#)

Here is an example of how the Return Policy Agreement appears to customers on the uPay Verification page.

Return Policy Agreement Text

TouchNet strongly recommends that each uPay site develop a return policy. The display of a return policy is typically required by credit card regulations.

This field accepts HTML. We recommend the use of `<h2>` tags for header text and `<p>` tags for body text. However, with the use of style sheet changes you can further modify the layout of return policy agreement text. (This field accepts a maximum of 50,000 characters.)

This text will appear on the uPay Verification page if you select Yes for the Show Return Policy Agreement field. See the illustrations above for an example of what customers will see.

Privacy Link Settings	
Show Privacy Link:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Privacy Link Label:	<input type="text" value="Privacy"/>
Privacy Link URL:	<input type="text"/>
Privacy Text (50,000 chars max): (HTML Allowed)	<div style="border: 1px solid #ccc; height: 100px;"></div>
Help Link Settings	
Show Help Link:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Help Link Label:	<input type="text" value="Help"/>
Help Link URL:	<input type="text"/>
Help Text (50,000 chars max): (HTML Allowed)	<div style="border: 1px solid #ccc; height: 100px;"></div>
Accessibility Link Settings	
Show Accessibility Link:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Accessibility Link Label:	<input type="text" value="Accessibility"/>
Accessibility Link URL:	<input type="text"/>
Accessibility Text (50,000 chars max): (HTML Allowed)	<div style="border: 1px solid #ccc; height: 100px;"></div>
<input type="button" value="Save"/>	

Privacy/Help/Accessibility Link Settings

Show [Privacy/Help/Accessibility] Link

Use of the Privacy, Help, and Accessibility links is optional. These links will appear in the bottom navigation bar of the uPay site. If you want to use one of these links, click the Yes radio button to enable the link. Separate configuration settings are available for the Privacy, Help, and Accessibility links.

[Privacy/Help/Accessibility Link] Link Label

The text for the Privacy, Help, and Accessibility links can be customized to meet the needs of your uPay site. The alternate text that you enter in these fields will appear in the bottom navigation menu of the uPay site. If you

make no entry in these fields, Marketplace will use the following default link text: "Privacy," "Help," and "Accessibility."

[Privacy/Help/Accessibility Link] Link URL

When the customer clicks on the Privacy, Help, Accessibility links in the bottom navigation bar of the uPay site, you can either send the customer to a web page that you manage outside of the Marketplace Operations Center (in which case you use the Privacy/Help/Accessibility Link URL field to point at this page) or open a modal window with content that is managed in Marketplace (in which case you use the Privacy/Help/Accessibility Text field to configure the window text). If you use a Link URL, a web page will need to be maintained on the destination server.

[Privacy/Help/Accessibility] Text

You can use Marketplace to manage the text that appears when the customer clicks on the Privacy, Help, and Accessibility links in the bottom navigation bar of your uPay site. This text will appear in a modal window. (This field accepts a maximum of 50,000 characters.)

HTML entered in this field must be properly formatted. It will undergo a validation process and any improperly formatted HTML will not be accepted. We recommend you become proficient in authoring HTML before you attempt to add HTML to this field.

Important! In order to ensure that Marketplace remains a secure environment for processing commerce transactions, fields that accept HTML in the Operation Center will not accept HTML comments, form tags, iframe tags, object tags, and some additional code—including JavaScript.

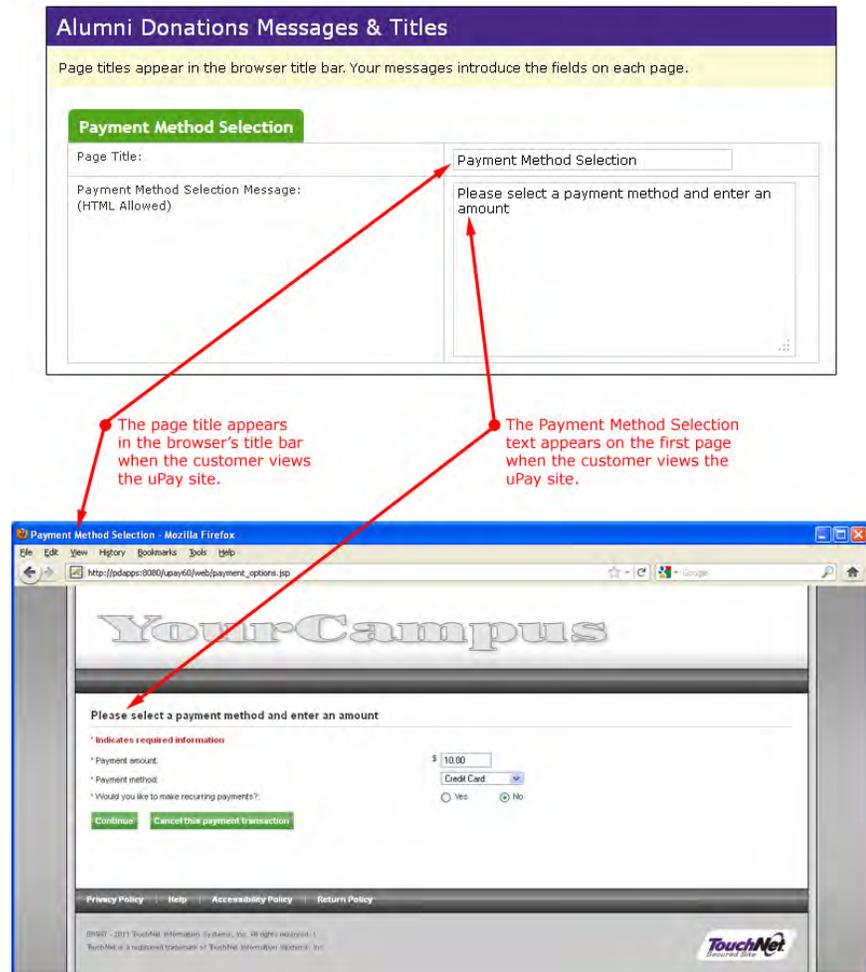
For more information about using HTML or CSS, please see the *Marketplace 6.5 uStores Layout Guide*.

Note: If you make entries in both the Privacy/Help/Accessibility Link URL field AND the Privacy/Help/Accessibility Text field, only the Link URL value will be used.

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.



The page title appears in the browser's title bar when the customer views the uPay site.

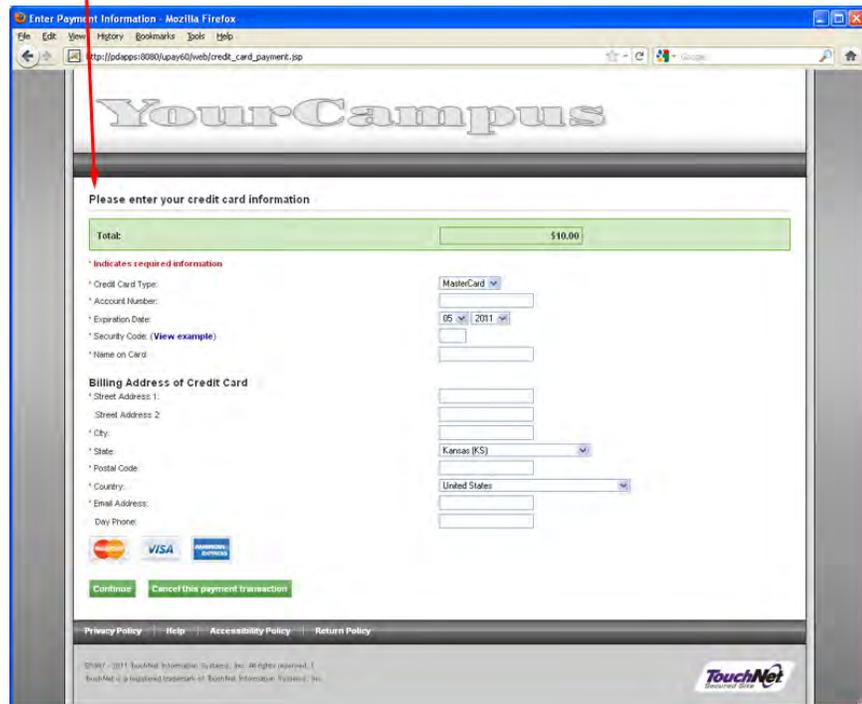
The Payment Method Selection text appears on the first page when the customer views the uPay site.

Entering text in the Credit Card fields has the following effects.

Credit Card	
Payment Info Page Title:	Enter Payment Information
Credit Card Payment Info Message: (HTML Allowed)	Please enter your credit card information
Verification Page Title:	Verify Your Payment Information
Credit Card Payment Verification Message: (HTML Allowed)	Please verify your payment information

If the customer selected Credit Card as the payment method, the next uPay payment page displays the Credit Card Payment Info Message above the credit card info fields.

After the customer enters their credit card info, the uPay site displays the Credit Card Payment Verification message above the info to be verified.

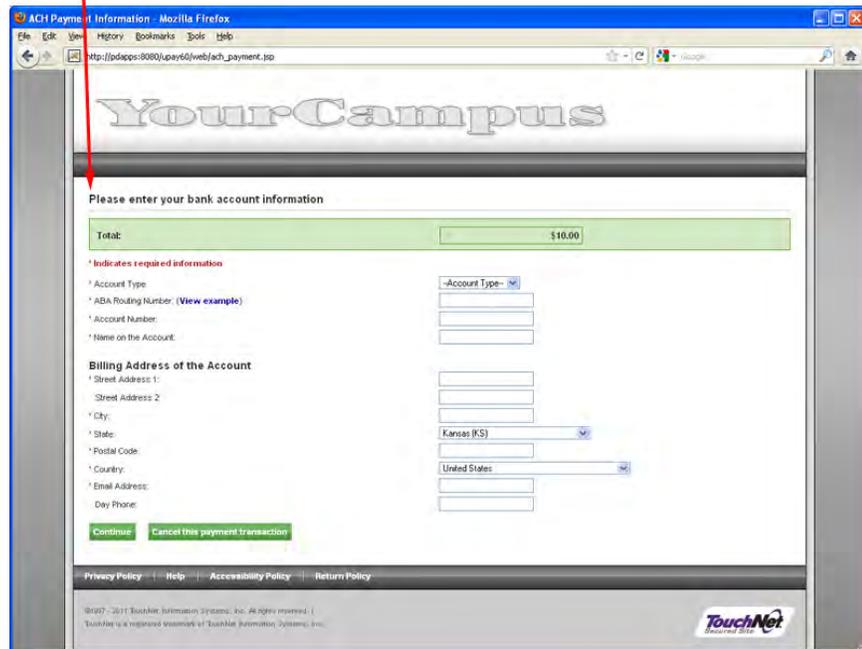


Entering text in the Electronic Banking fields has the following effects.

Electronic Banking Pages	
Payment Info Page Title:	ACH Payment Information
ACH Payment Info Message: (HTML Allowed)	Please enter your bank account information
ACH Agreement Page Title:	ACH Agreement
ACH Agreement Page Header Message: (HTML Allowed)	ACH Payment Information

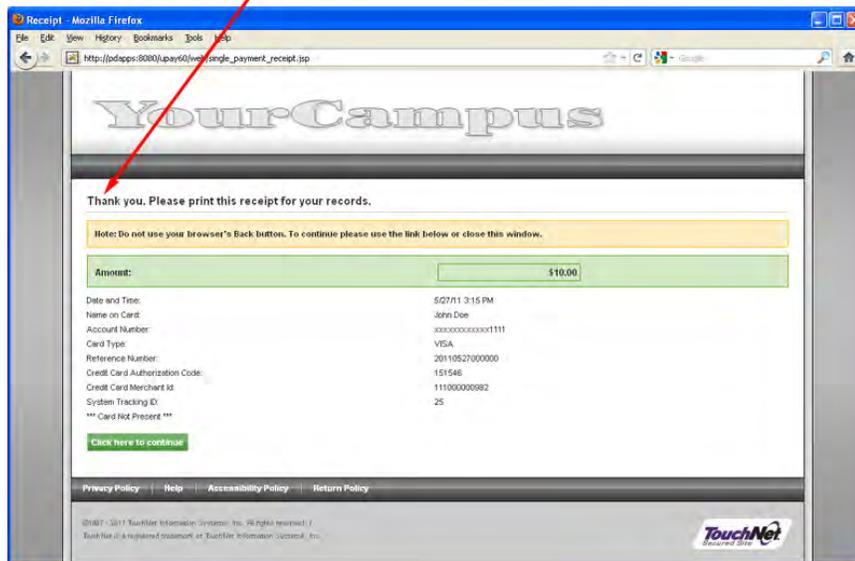
If the customer selected Electronic Check (ACH) as the payment method, uPay displays the ACH Payment Info message above bank account info fields.

After the customer enters bank account info, uPay displays the ACH Agreement Page Header message above the payment information and the ACH agreement.



The text you enter in the Receipt Page fields affects what the customer sees at the end of the payment process.

The Receipt Message appears on uPay's Receipt page



uPay Site Manager

The next uPay setup screen is the User Settings screen, where you select a uPay Site Manager.

Select a site Manager from the list of U.Commerce users. All U.Commerce users are listed in the Marketplace User dropdown list. You can select yourself as the Site Manager or you can set up another U.Commerce user as the uPay site manager.

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.

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 ["Passing Parameters to Your uPay Site" on page 456](#).

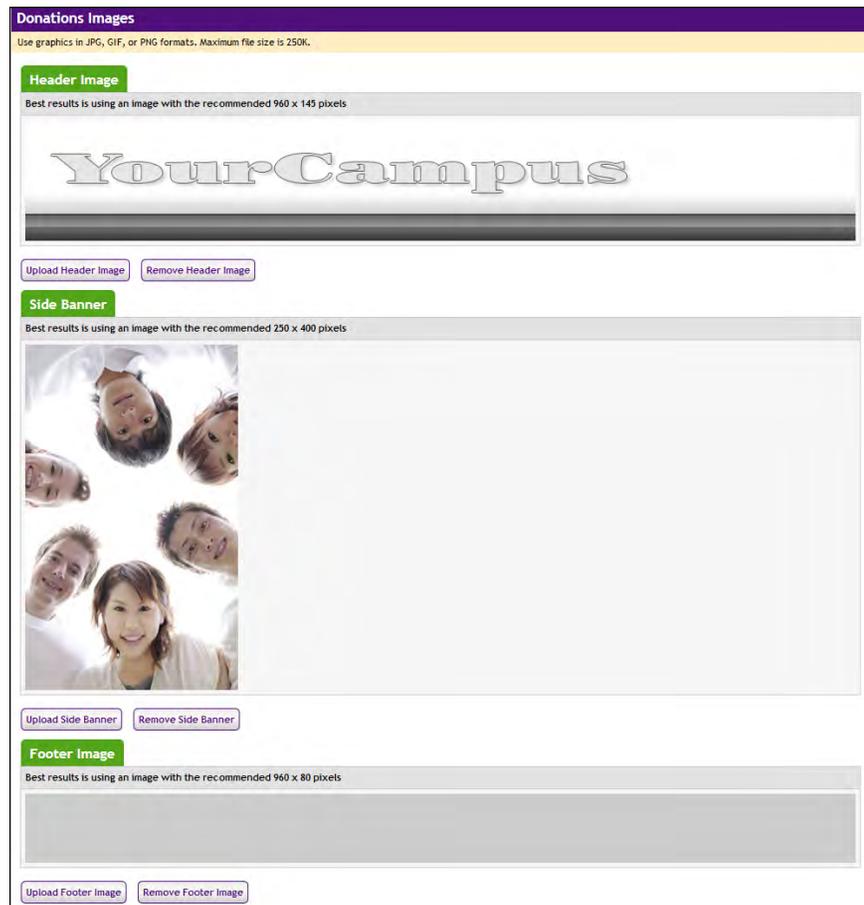
When you finish using the Form Parameters page, you can click the Upload Custom Images button to work with images for your site.

Note: You can return to the Form Parameters page at any time by using the Form Parameters link in the left navigation 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 page via the left navigation menu:

Marketplace Home > [Merchant Name] > uPay Sites > [uPay Site Name] > Image Settings



Select images for your layout in the Image Management page.

You can upload the following images for each uPay site:

- **Header Image**—This image appears in the header area of your uPay site pages. By default, an area 960 pixels wide by 145 pixels high is reserved on the uPay payment pages for the header image. You should always upload a header image for your uPay site.
- **Side Banner**—(Optional) This image is optional. It appears to the left of the uPay fields. If you upload a side banner, the uPay fields move to the right and an area 250 pixels wide by 400 pixels high is created for the side banner.
- **Footer Image**—(Optional) This image is optional. It appears in the footer area of your uPay site pages. By default, an area 960 pixels wide by 80 pixels high is reserved on the uPay payment pages for the footer image. The TouchNet copyright and logo appear on top of the footer image, which is used in the background.

For examples of how these images appear on uPay pages, see ["uPay Site Images" on page 412](#).

Graphics Specifications

Use graphics in JPG, GIF, or PNG format. The maximum graphics file size is 250K.

We recommend that you upload images at the recommended (default) sizes. If you upload images at different pixel dimensions, you may need to edit the style sheet for your uPay site in order to adjust the page layout accordingly.

Important! It is your responsibility to ensure that you have all necessary rights for the images you upload. Images that you did not create (such as images on other web sites) are typically protected by copyright law and should not be uploaded for use in Marketplace unless you have received permission from the copyright holder.

Additional Donations

The Additional Donation page does not appear as part of the uPay site creation process. However, once a uPay site has been created, you can use this page to configure a uPay site for offering an additional donation option to customers.

To view the Additional Donation page, use the left navigation menu:

Marketplace Home > [Merchant Name] > uPay Sites > [uPay Site Name]
> Additional Donation

Donations Additional Donation

Use Additional Donation to present uPay customers with the option of adding a one-time donation to their uPay payment. Additional Donation is not available with T-Link. Customers who choose to make recurring payments will not see Additional Donation.

Additional Donation Settings

Add an additional option in the payment process to request a one-time donation? Yes No

Donation name:

Prompt for a one-time donation:

Description: (30,000 chars max)
(HTML Allowed)

Hi, Old Smoky, our mascot, is in danger of being sent to a glue factory unless we can cover his outstanding debt. We need your help fast! Would you like to help prevent Old Smoky from becoming glue? If so, please make an additional donation to the Save Our Mascot Fund.

Set up one or more amounts from which the buyer may choose to purchase. User entered amount allows the buyer to determine the purchase amount.

Donation amount:

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	User entered amount.
1	<input checked="" type="checkbox"/>	<input type="text" value="20.00"/>
2	<input checked="" type="checkbox"/>	<input type="text" value="50.00"/>
3	<input type="checkbox"/>	<input type="text" value="100.00"/>
4	<input type="checkbox"/>	<input type="text" value="200.00"/>

[Add More Selections](#)

[Save](#)

Image Management for Additional Donation

Best results is using an image with the recommended W x H: 250 x 250 pixels

No Images

[Upload full size image](#)

Select images for your layout in the Image Management page.

Field Definitions:

Add an additional option in the payment process to request a one-time donation?

Choose the Yes button to turn on the additional donation option.

Name of your donation

#1 in the following screenshot

Give the donation a name. Customers will see this name appear immediately below the Amount box near the top of the page.

Customers see the Additional Donation page during the checkout process. See the field definitions for references to the numbered sections.

Prompt displayed to user to request a one-time donation

#3 in the above screenshot

This prompt message appears immediately after the donation description and above the donation amount field(s). You should word this message in terms of "How much would you like to donate?" because the donation amount fields follow this prompt.

Description

#2 in the above screenshot

The description field can be used to provide customers with information about the additional donation option. Customers can read this field and then make a good decision regarding whether to opt for the additional donation. This field accepts up to 30,000 characters and it accepts HTML.

Note: Please keep in mind the main reason your customers arrive at the uPay site is to make a payment, so long blocks of text or HTML in the description field may serve as a deterrent to customers completing the transaction. We recommend you make your descriptions concise.

Donation amount

#4 in the above screenshot

This section allows you to determine the donation amount fields that will be presented to customers.

If you choose the "User entered amount" checkbox, the customer will see an entry box that they can use for entering a specific donation amount.

If you choose the #1 checkbox, you can enter a specific donation amount that will appear as an option for customers (as a radio button selection). You can add additional donation amounts by selecting the Add More Selections

button. In addition to these specific donation amount options, customers will also see an option for "No, Thank You" (as a radio button selection).

Image Management for Additional Donation

You can use the "Upload full size image" button to upload an image that will appear for customers when they view the Additional Donation page on the uPay site.

10.3 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 ["Using a Posting URL" on page 475](#)).

uPay 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_USER_CAN_CHANGE, 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 475](#). 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. uPay takes actions on the following parameters.

Parameters that uPay takes action upon once receiving:

Parameters	Description	Field Length	Data Type
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.	unlimited	numeric
BILL_NAME	Used to pass the billing name.	50	alphanumeric
BILL_EMAIL_ADDRESS	Used to pass the billing e-mail address.	50	alphanumeric
BILL_STREET1	Used to pass the billing street address 1.	30	alphanumeric
BILL_STREET2	Used to pass the billing street address 2.	30	alphanumeric
BILL_CITY	Used to pass the billing city.	35	alphanumeric
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. Note: If an invalid two-character state abbreviation is passed, the default state as established in the system administrative settings will be used.	2	alphanumeric
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.	30	alphanumeric
BILL_COUNTRY	Used to pass the two-letter country code for the billing country. You must use the two-letter English language country codes approved by the International Organization for Standardization. This list can be found at www.iso.org/iso/country_codes.htm . Note: If an invalid two-character country abbreviation is passed, the default country as established in the system administrative settings will be used.	2	alphanumeric

Parameters	Description	Field Length	Data Type
EXT_TRANS_ID	<p>Optional. The value for this parameter is 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 information about the transaction.</p> <p>If the campus web application passes the VALIDATION_KEY parameter (and Yes for "Require encoded validation key for amount?" is selected on the uPay Payment Settings page), then you MUST pass the EXT_TRANS_ID parameter.</p> <p>This field does not appear if you selected Yes for "Site uses T-Link" on the uPay Payment Settings page.</p> <p>If Yes is selected for "Validate External Transaction ID is unique to this uPay site?" on the uPay Payment Settings page, uPay will require that an EXT_TRANS_ID is passed by the campus web application. In this case, the EXT_TRANS_ID value must be unique for this uPay site. uPay will validate that the submitted external transaction ID has not previously been used. (However, this EXT_TRANS_ID value CAN be used by other uPay sites.) If this value is not passed, or if the value is not unique, the customer will receive an error message.</p> <p>Use of the EXT_TRANS_ID parameter 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.</p>	250	alphanumeric
EXT_TRANS_ID_LABEL	<p>Optional. This field can contain a description of the EXT_TRANS_ID value. If this parameter is used <i>and</i> EXT_TRANS_ID is also passed, this description appears on the receipt that the customer sees at the end of the uPay payment process. HTML is NOT allowed in this field.</p>	unlimited	alphanumeric

Parameters	Description	Field Length	Data Type
AMT	<p>Optional. If used, this parameter automatically completes the Payment Amount field when the customer arrives at the uPay site. To use this parameter, you must configure your uPay site by selecting Yes for "Allow the amount to be passed in" on the uPay Payment Settings page.</p> <p>If the campus web application passes the VALIDATION_KEY parameter (and Yes for "Require encoded validation key for amount?" is selected on the uPay Payment Settings page), then you MUST pass the AMT parameter.</p> <p>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 423.</p> <p>Maximum value: 99999.99.</p>	8 (including 2 characters to the right of the decimal point)	numeric
SSV	<p>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.</p> <p>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.</p>	unlimited	alphanumeric

Parameters	Description	Field Length	Data Type
SSV_PROMPT	<p>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.</p>	unlimited	alphanumeric
VALIDATION_KEY	<p>If the uPay site has been configured to accept a passed amount from the campus web application, TouchNet recommends that the VALIDATION_KEY parameter also be passed. The use of an encoded validation key helps to ensure the integrity of amounts that are passed to uPay.</p> <p>In order to pass a VALIDATION_KEY, the following actions must be taken:</p> <ul style="list-style-type: none"> • The "Require encoded validation key for amount?" field on the uPay Payment Settings page must be set to Yes. • You must enter a "Passed Amount Validation Key" value on the uPay Payment Settings page. • The campus web application must pass a transaction amount (AMT) as an input parameter. • The campus web application must pass an external transaction ID (EXT_TRANS_ID) as an input parameter. • The campus web application must determine the value for the VALIDATION_KEY parameter as described in "Using the VALIDATION_KEY Option" on page 469. <p>If any part of this configuration has not been completed, uPay will not accept the payment.</p>	unlimited	alphanumeric
ADD_ON_OFFER_DISABLED	<p>If the display of an Additional Donation has been turned on in the uPay site configuration, the Additional Donation can be turned off by passing true as the value for this parameter.</p>	unlimited	alphanumeric

Parameters	Description	Field Length	Data Type
RECURRING_USER_CAN_CHANGE	<p>Optional. In order to establish recurring payments, this parameter MUST be passed.</p> <p>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.</p> <p>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.</p>	unlimited	alphanumeric

Parameters	Description	Field Length	Data Type
RECURRING_CAN_CHANGE_END_DATE_TO_CC_EXP_DATE	<p>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 <i>before</i> the projected end date of the recurring payments. Accepted values: Yes or No.</p> <p>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 recurring payments, uPay will automatically change the end date of the recurring payments 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 recurring payments, uPay will prompt the customer to use a different credit card.</p> <p>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 when establishing recurring payments: 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 end date of the recurring payments. 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.</p> <p>Note: 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 recurring payments can 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 recurring payments would be less desirable than the elimination of one or more individual payments. In contrast, the elimination of payments for a product that is actually delivered to the customer, such as a</p>	unlimited	alphanumeric

Parameters	Description	Field Length	Data Type
	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 payments. The customer must enter today's date or a later date (i.e., the customer cannot enter a past date). Required date format: mm/dd/yyyy.	10	alphanumeric
RECURRING_END_DATE	If the uPay site accepts recurring payments, this parameter determines the end date for the recurring payments. Required date format: mm/dd/yyyy.	10	alphanumeric
RECURRING_FREQUENCY	If the uPay site accepts recurring payments, this parameter sets the frequency of the scheduled payments. 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 payments, send RECURRING_FREQUENCY = 4; Do not send RECURRING_FREQUENCY = Weekly.	unlimited	numeric
RECURRING_NUMBER_OF_PAYMENTS	If the uPay site accepts recurring payments, this parameter determines the number of scheduled recurring payments. 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.	unlimited	numeric
CONTINUE_LINK_TEXT	Optional. This parameter can be used for passing the alternative text to be displayed as the Continue link in the uPay site.	unlimited	alphanumeric

Parameters	Description	Field Length	Data Type
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.	unlimited	alphanumeric
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.	unlimited	alphanumeric
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.	unlimited	alphanumeric
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.	unlimited	alphanumeric
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.	unlimited	alphanumeric

Parameters	Description	Field Length	Data Type
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).	unlimited	alphanumeric
CREDIT_ACCT_CODE	Used to pass a credit accounting code. This value will override the credit accounting code that was entered when the uPay site was configured. This value must be an approved code for the general ledger system. Additional credit account codes may be passed with _# appended to the CREDIT_ACCT_CODE and CREDIT_ACCT_AMT parameters (examples: CREDIT_ACCT_CODE_2 and CREDIT_ACCT_AMT_2). If multiple account codes are passed, CREDIT_ACCT_CODE must be passed.	unlimited	alphanumeric
DEBIT_ACCT_CODE	Used to pass a debit accounting code. This value will override the debit accounting code that was entered in Payment Gateway as the Host Payment Method ID for this uPay site. This value must be an approved general ledger code.	unlimited	alphanumeric
CREDIT_ACCT_AMT	When passing multiple accounting codes, this parameter is used to pass the amount to be associated with the corresponding credit account code (CREDIT_ACCT_CODE). If CREDIT_ACCT_AMT is passed, CREDIT_ACCT_CODE must also be passed. Additional credit account amounts may be passed with _# appended to the CREDIT_ACCT_CODE and CREDIT_ACCT_AMT parameters (examples: CREDIT_ACCT_CODE_2 and CREDIT_ACCT_AMT_2).	unlimited	alphanumeric

Parameters	Description	Field Length	Data Type
CREDIT_ACCT_AMT_2	When passing multiple accounting codes, this parameter is used to pass the amount to associate with the corresponding credit account code (CREDIT_ACCT_CODE_2). If this parameter is passed, CREDIT_ACCT_CODE_2 must also be passed. Additional credit account amounts may be passed using the same naming convention (Example: CREDIT_ACCT_AMT_3). The sum of these amounts must equal the amount passed with the AMT parameter.	unlimited	alphanumeric
CREDIT_ACCT_CODE_2	This parameter can be used to pass an additional accounting code. If this parameter is passed, CREDIT_ACCT_AMT_2 must also be passed. Additional credit account codes may be passed using the same naming format. (Example: CREDIT_ACCT_CODE_3.) Whenever CREDIT_ACCT_CODE_# is passed, a corresponding CREDIT_ACCT_AMT_# must be passed to specify the amount. Any additional credit accounting codes passed must be in numerical sequence (i.e., don't skip any numbers). There is no limit to the number of credit accounting codes that can be passed as input parameters.	unlimited	alphanumeric
ADD_ON_OFFER_CREDIT_ACCT_CODE	This parameter is used to pass an override value for the Additional Donation accounting code (only used if Additional Donation is enabled in the uPay site settings).	unlimited	alphanumeric

Passing Parameters with an HTML Form

After you have used Marketplace to build a uPay site, the campus web application that will be connecting to the uPay site must be configured to pass the parameters that identify the site and provide information about the customer and/or transaction.

The typical method of passing parameters is via an HTML form. The following section describes how to set up an HTML form to pass parameters.

Important! Technical details on configuring a campus web application to pass parameters to a uPay site are outside the scope of this document. This document provides an example of using an HTML form to pass parameters; however, the best method for your situation should be determined by the administrator of your campus web application.

Here are the essential components of an HTML form that passes parameters to a uPay site:

HTML Element	Attributes
<form >	<p>action = "http://[server]/[context]/web/index.jsp"</p> <p>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.</p> <p>method = "post"</p> <p>Use the "POST" method. The uPay site will not accept parameters from a "GET" method.</p>
<input > (#1)	<p>type = "hidden"</p> <p>name = "UPAY_SITE_ID"</p> <p>value = "z"</p> <p>UPAY_SITE_ID is a numerical value unique to each uPay site. The value is displayed on the Form Parameters page of the uPay site (Marketplace Home > [merchant name] > uPay Sites > [upay site name] > Form Parameters). You should find this ID number and enter it as the value attribute.</p> <p>Usage: This parameter is required in order to launch a uPay site.</p>
<input > (#2)	<p>type = "hidden"</p> <p>name = "EXT_TRANS_ID"</p> <p>value = "x"</p> <p>EXT_TRANS_ID is the transaction ID generated by the campus web application that is passing the dollar amount to the uPay site. Enter the ID as the value attribute. Maximum allowable length for EXT_TRANS_ID: 250 characters.</p> <p>Usage: This parameter is optional; however, in order for uPay to pass information about the transaction status back to your campus web application, you must initially pass a transaction ID to your uPay site. By using EXT_TRANS_ID as the name of the transaction ID, you can use the Marketplace Operations Center to search for submitted transaction IDs and to view reports that display the EXT_TRANS_ID value).</p>

HTML Element	Attributes
<input> (#3)	type = "hidden" name = "AMT" value = "y" AMT is the dollar amount of the transaction. Enter the dollar amount as the value attribute. Usage: The AMT parameter is optional; however, in many scenarios, this parameter is essential in order for your campus web application and uPay to work together effectively.
<input> (#4)	type = "submit" value = "Click Here to Pay" You can edit the value attribute as necessary and apply style sheet attributes to the <input> tag so that the submit button is customized. You can also use an image in lieu of the form-generated submit button.

Note: You can pass many additional parameters to your uPay site, and in turn pass the parameters back to your campus web application after the transaction is processed (provided you use uPay's posting URL option, as described in ["Using a Posting URL" on page 475](#)). However, uPay only takes specific actions based on the parameters described in ["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." on page 456](#).

An HTML Form Example

Here is an example that shows what an HTML form might look like that passes parameters to a uPay site:

```
<form action="https://someserver/upay/web/index.jsp"
  method="post">
  <input type="hidden" name="UPAY_SITE_ID" value="3">
  <input type="hidden" name="EXT_TRANS_ID" value="x">
  <input type="hidden" name="AMT" value="y">
  <input type="submit" value="Click Here To Pay">
</form>
```

In this example, three parameters are passed to uPay. First, the identifying numeric value for UPAY_SITE_ID is passed. This value identifies the uPay site. Second, a transaction ID is passed. This parameter is named EXT_TRANS_ID. And third, a dollar amount for the transaction is passed. This parameter is named AMT.

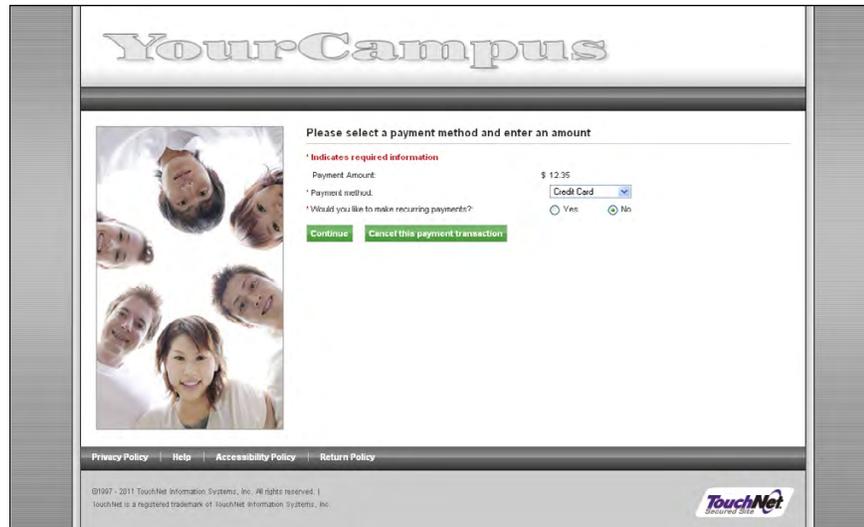
Note: In this example, the UPAY_SITE_ID value can be entered as a static part of the form; however, both the EXT_TRANS_ID value and the AMT value should be determined dynamically. In this way, a unique transaction

ID is established for each transaction, and the appropriate dollar amount for the customer's transaction is passed to uPay.

On a web page, this HTML creates a submit button that looks like this (in Windows XP with Internet Explorer 6.0):



When the Click Here to Pay button is clicked, the parameters are passed to the uPay site, and the site is loaded in the customer's browser:



Notice the dollar amount has been passed to the page. The uPay site is now ready for the customer to select a payment method and complete the transaction.

10.4 Using the VALIDATION_KEY Option

If a uPay site has been configured to accept a passed amount from the campus web application, TouchNet recommends that the VALIDATION_KEY parameter also be passed.

Important! The use of an encoded validation key helps to ensure the integrity of transaction amounts that are passed to uPay by a campus web application.

In order to use the VALIDATION_KEY option, the following actions must be taken:

- The "Require encoded validation key for amount?" field on the uPay Payment Settings page must be set to Yes. (For more information, see ["uPay Site Configuration for the VALIDATION_KEY Option" on page 470.](#))

- You must enter a "Passed Amount Validation Key" value on the uPay Payment Settings page. (For more information, see "[uPay Site Configuration for the VALIDATION_KEY Option](#)" on page 470.)
- The campus web application must determine the value for the VALIDATION_KEY parameter as described in "[Creating a VALIDATION_KEY](#)" on page 472.
- The campus web application must pass a transaction amount (AMT) as an input parameter. (For more information, see "[About the AMT Parameter](#)" on page 473.)
- The campus web application must pass an external transaction ID (EXT_TRANS_ID) as an input parameter. (For more information, see "[About the EXT_TRANS_ID Parameter](#)" on page 474.)
- The campus web application must pass the VALIDATION_KEY as an input parameter. (For more information, see "[Passing a VALIDATION_KEY to a uPay Site](#)" on page 474.)

If any part of this configuration has not been completed, uPay will not accept the payment.

The following subsections provide the details for using the VALIDATION_KEY option.

uPay Site Configuration for the VALIDATION_KEY Option

To configure a uPay site for using 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

Payment Settings	
Passed Amount Validation Key enforces tighter security when passing an amount from your application. Applies only if amount passed in and site does not use T-Link	
Require encoded validation key for amount:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Passed Amount Validation Key:	<input type="text"/>
Allow the amount to be passed in:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Allow the user to edit the payment amount:	<input checked="" type="radio"/> Yes <input type="radio"/> No
All payment amounts are in USD (\$)	
Payment Amount Prompt:	<input type="text" value="Donation amount"/>
Default Payment Amount (Example: 1234.56)	<input type="text" value="10"/>
Minimum Payment Amount:	<input type="text" value="1"/>
Maximum Payment Amount:	<input type="text"/>

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 if the VALIDATION_KEY parameter has been passed, as

described in the following sections of this chapter. If you direct customers to the uPay site without passing a VALIDATION_KEY, the uPay site will fail to load.

- 4 Enter a value in the "Passed Amount Validation Key" field. This field accepts a maximum of 30 alphanumeric characters.

The "Passed Amount Validation Key" is a unique value stored for each uPay site that uses the VALIDATION_KEY option. This value is also known by the campus web application, which uses this value (in conjunction with the AMT and EXT_TRANS_ID parameters) in determining the value of the VALIDATION_KEY parameter (as described in "[Creating a VALIDATION_KEY](#)" on page 472).

Because the campus web application uses this value but does NOT pass this value to the uPay site, the "Passed Amount Validation Key" can then be used by uPay to validate the encoded VALIDATION_KEY parameter.

You should work with the administrator of the campus web application to determine the value of the "Passed Amount Validation Key" field.

- 5 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.
 - **Validate External Transaction ID is unique to the uPay site?**—We recommend the campus web application uses unique External Transaction IDs with each transaction. By taking this action, the campus web application helps to further ensure the integrity of the VALIDATION_KEY parameter. (For more about the EXT_TRANS_ID parameter, see "[Passing a VALIDATION_KEY to a uPay Site](#)" on page 474.)
- 5 Click the Save button.

Creating a VALIDATION_ KEY

The process of creating a VALIDATION_KEY must be done by the campus web application. The process must be performed according to the methodology described below.

Important! Please 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.

Important! To use the VALIDATION_KEY option, the administrator of the campus web application 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.

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 for each uPay transaction.

Use the following steps to create the encoded value for the VALIDATION_KEY parameter:

- 1 Create a text string in this format:
[Passed Amount Validation Key][EXT_TRANS_ID][AMT].
 - **Passed Amount Validation Key**—The "Passed Amount Validation Key" is a unique identifying code. 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 "[uPay Site Configuration for the VALIDATION_KEY Option](#)" on page 470. This value may contain a maximum of 30 alphanumeric characters.
 - **EXT_TRANS_ID**—The EXT_TRANS_ID is generated by the campus web application. This ID serves as a cross-reference between the campus web application and uPay. This value should be generated dynamically by the campus web application. Ideally, this ID will be a unique value. For more information, see "[About the EXT_TRANS_ID Parameter](#)" on page 474. This value may contain a maximum of 250 alphanumeric characters.
 - **AMT**—The dollar amount of the transaction. For more information, see "[About the AMT Parameter](#)" on page 473. This parameter may contain a maximum of 8 numeric characters, including two numeric characters to the right of the decimal point. Dollar values are NOT required to include cents. For example, \$25 could be represented as 25 or 25.00. However, you MUST use the same value for AMT when generating the VALIDATION_KEY value as when passing the AMT parameter to uPay. Maximum value: 99999.99.

Note: Do not include brackets or plus signs in the text string. For example, for the following values—"Passed Amount Validation 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 474 .

An Example of Creating a VALIDATION_ KEY

Here is an example of creating a VALIDATION_KEY. We will use the following values: "Passed Amount Validation 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.

Note: If you attempted to walk through this example and do the MD5 and Base 64 encoding but you received a different result, you should verify whether your Base64 encoding tool can accept values in hex format. Some Base64 encoding tools only accept values in ASCII text format. If you place a hex format value into the ASCII text field of a Base64 encoding tool, you will NOT get a correct result.

About the AMT Parameter

The AMT parameter must be passed in order to use the VALIDATION_KEY option. In addition, the AMT parameter must be used by the campus web application when determining the value to pass to uPay as the VALIDATION_KEY parameter.

You must configure your uPay site to expect this parameter by selecting Yes for "Allow the amount to be passed in" on the uPay Payment Settings page, as described in "[uPay Site Configuration for the VALIDATION_KEY Option](#)" on page 470.

The AMT parameter automatically completes the Payment Amount field when the customer arrives at the uPay site.

The value of the parameter is a maximum of 8 numeric characters, including two numeric characters to the right of the decimal point. Dollar values are NOT required to include cents. For example, \$25 could be represented as 25 or 25.00. However, you MUST use the same value for AMT when generating the VALIDATION_KEY value as when passing the AMT parameter to uPay.

Maximum value for AMT parameter: 99999.99.

About the EXT_TRANS_ ID Parameter

The EXT_TRANS_ID parameter must be passed in order to use the VALIDATION_KEY option. In addition, the EXT_TRANS_ID parameter must be used by the campus web application in determining the value of the VALIDATION_KEY parameter.

The EXT_TRANS_ID parameter serves as a cross-reference between the web application and Marketplace. The value of the parameter will be stored in the Marketplace database along with information about the transaction.

We recommend the campus web application uses unique External Transaction IDs with each transaction. By taking this action, the campus web application helps to further ensure the integrity of the VALIDATION_KEY parameter.

If you select Yes for "Validate External Transaction ID is unique to the uPay site?" on the uPay Payment Settings page, uPay will validate that the submitted EXT_TRANS_ID value has not previously been used. (However, this EXT_TRANS_ID value CAN be used by other uPay sites.) If this value is not passed, or if the value is not unique, the customer will not be able to complete the transaction.

The EXT_TRANS_ID is a maximum of 250 alphanumeric characters.

Passing a VALIDATION_ KEY to a uPay Site

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 472) and then pass this value to the corresponding 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.

Here is the uPay site URL:

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

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	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).
EXT_TRANS_ID	EXT_TRANS_ID is the ID generated by the campus web application web site that is passing the transaction 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 amount of the transaction. Be sure you use the same value that was used when the VALIDATION_KEY was created.
VALIDATION_KEY	Use the encoded VALIDATION_KEY value that you determined as described in "Creating a VALIDATION_KEY" on page 472 .

When the parameters are passed to the uPay site, the site loads in the customer's browser with the Payment Amount field pre-populated. The uPay site is now ready for the customer to select a payment method and complete the transaction.

10.5 Using a Posting URL

After a transaction is processed (or recurring payments are scheduled), 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 web application, such as a payment amount or a transaction ID, as described in **"Passing Parameters to Your uPay Site" on page 456**. These parameters can include information about the status of the transaction (as determined by Payment Gateway). When this information is posted, the status of the transaction can be updated in the campus web application.

Note: Campus web applications do not necessarily need to pass a transaction ID to uPay; however, without a transaction ID the campus organization will likely have difficulty matching payment information with customer information. We recommend use of the EXT_TRANS_ID parameter, which allows for payment search on this parameter in the Marketplace Operations Center.

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.

Posting Settings	
To have payment results and other useful data posted to your application, use the Posting URL. This URL is not used to navigate the user's browser. It is used only to update your application.	
Post data to show when users click Cancel:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Make uPay User wait for post to complete:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Number of seconds for uPay User to wait before marking posting as failed:	<input type="text" value="10"/>
Posting URL:	<input type="text"/>
Additional posting value can be passed as an identifier for post-back validation.	
Additional Posting Value:	<input type="text"/>

- 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) Select Yes if you would like to post parameters to the posting URL when the customer clicks the uPay site's Cancel button.
- 4 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.

Important! For schools that use Oracle stored procedures with posting URLs, TouchNet strongly recommends the use of "Flexible Parameter Passing." For more information, see "[Using Flexible Parameter Passing](#)" on page 477.

Using Flexible Parameter Passing

Some TouchNet clients have chosen to write uPay posting handling processes using Oracle stored procedures via the Oracle application server's MOD_PLSQL extension module. These stored procedures are written in PL/SQL language, and this language is very inflexible in how it accepts parameters. It normally expects a complete set of pre-defined parameters. If any of the parameters are missing, the transaction may fail. If any additional parameters are passed, the transaction will fail.

Oracle's "Flexible Parameter Passing" allows your campus web applications or TouchNet Ready Partner applications to accept any number of parameters, instead of being locked into a pre-defined set of request parameters. Therefore, we strongly recommend the use of "Flexible Parameter Passing" with uPay posting URLs. You can learn more about "Flexible Parameter Passing" by going to the Oracle web site:

http://download.oracle.com/docs/cd/B14099_19/web.1012/b14010/concept.htm#i1005764

Using "Flexible Parameter Passing" allows campus web applications and TouchNet Ready Partner applications to adapt to the changes that we make to uPay.

Posting URL Parameters

Once a 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 web 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 web application initially passed to uPay*, except for `VALIDATION_KEY`:

Parameters for both credit card transactions and ACH transactions:

Parameters	Description	Field Length	Data Type
posting_key	The Additional Posting Value specified on the uPay Miscellaneous Settings page. Some campus web applications use this value to ensure the identity of the uPay site that is communicating with the posting URL. (See " Miscellaneous: Links, URLs, and E-mail " on page 436.)	30	alphanumeric
tpg_trans_id	A reference number assigned by Payment Gateway.	unlimited	alphanumeric
pmt_status	Status of the transaction as reported by Payment Gateway. Either "success" or "cancelled".	unlimited	alphanumeric
pmt_amt	Amount of the transaction processed by Payment Gateway. (Maximum value: \$99,999.99.) <i>Forrecurring payments:</i> During setup, the total amount of all recurring payments is passed to the posting URL as the pmt_amt parameter. This is the same parameter used for each recurring payment. 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 all recurring payments or the amount for an individual recurring payment.	8 (including 2 characters after the decimal point)	numeric
pmt_date	Date the transaction was processed by Payment Gateway. (Format: mm/dd/yyyy.)	unlimited	alphanumeric
name_on_acct	Name on credit card account or bank account.	50	alphanumeric
acct_addr	The address entered by the customer in uPay. This parameter is passed only if the uPay site has been set up to require address verification data.	35	alphanumeric
acct_addr2	The second address line entered by the customer in uPay. This parameter is passed only if the uPay site has been set up to require address verification data.	35	alphanumeric
acct_city	The city entered by the customer in uPay. This parameter is passed only if the uPay site has been set up to require address verification data.	35	alphanumeric
acct_state	The state entered by the customer in uPay. This parameter is passed only if the uPay site has been set up to require address verification data.	2	alphanumeric

Parameters	Description	Field Length	Data Type
acct_zip	The zip code entered by the customer in uPay. This parameter is passed only if the uPay site has been set up to require address verification data.	30	alphanumeric
acct_country	The country selected by the customer. The two-letter code represents the English language country codes approved by the International Organization for Standardization. This list can be found at www.iso.org/iso/country_codes.htm . This parameter is passed only if the uPay site has been set up to require address verification data.	2	alphabetic
acct_email_address	The customer can be required to enter an e-mail address or this field can be optional.	50	alphanumeric
acct_phone_day	This phone field is an optional entry field.	20	alphanumeric
acct_phone_night	This phone field is an optional entry field.	20	alphanumeric
acct_phone_mobile	This phone field is an optional entry field.	20	alphanumeric
EXT_TRANS_ID	An 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.	250	alphanumeric
UPAY_SITE_ID	A unique ID that identifies the uPay site. Assigned by Marketplace when the uPay site was created.	unlimited	numeric
sys_tracking_id	An internal Marketplace identifier (also known as the order ID) that is displayed to the customer on the uPay receipt page.	unlimited	numeric

Parameters	Description	Field Length	Data Type
recurring_payment_type	This value is only specified if the payment is a recurring payment. Two values are possible: "setup" (for the initial setup of recurring payments) and "payment" (for a single recurring payment). During setup, the total amount of all scheduled payments is passed to the posting URL as the pmt_amt parameter. This is the same parameter used for each recurring payment. 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 all recurring payments or the amount for an individual recurring payment.	unlimited	alphanumeric
recurring_setup_number_of_payments	This value is specified for uPay-driven recurring payments and indicates the total number of payments.	unlimited	numeric
recurring_setup_start_date	This value is specified for uPay-driven recurring payments and indicates the date of the first scheduled payment. (Format: mm/dd/yyyy.)	10	alphanumeric
recurring_setup_end_date	This value is specified for uPay-driven recurring payments and indicates the date when the recurring payments will end. 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". (Format: mm/dd/yyyy.)	10	alphanumeric
recurring_setup_frequency	This numerical value is specified for uPay-driven recurring payments and indicates the frequency of payments: 4 = weekly, 1 = monthly, 2 = bi-monthly, 5 = quarterly, 6 = semi-annually, and 7 = annually.	unlimited	numeric

Additional parameters for credit card transactions:

Parameters	Description	Field Length	Data Type
card_type	Type of credit card: MasterCard, Visa, AmEx, Discover, etc.	unlimited	alphanumeric

Additional parameters for ACH transactions:

Parameters	Description	Field Length	Data Type
bank_name	These values are obtained from Payment Gateway based on the routing number entered	unlimited	alphanumeric
bank_addr1	These values are obtained from Payment Gateway based on the routing number entered	unlimited	alphanumeric
bank_addr2	These values are obtained from Payment Gateway based on the routing number entered	unlimited	alphanumeric
bank_routing_num	These values are obtained from Payment Gateway based on the routing number entered	unlimited	alphanumeric

Parameters for cancellations:

Parameters	Description	Field Length	Data Type
posting_key	A security value specified when the uPay site was built. (See " Miscellaneous: Links, URLs, and E-mail " on page 436.)	unlimited	alphanumeric
pmt_status	This value is always "cancelled" for cancellations.	unlimited	alphanumeric
EXT_TRANS_ID	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.	250	alphanumeric
UPAY_SITE_ID	A unique ID that identifies the uPay site. Assigned when the uPay site was created.	unlimited	numeric

About Recurring Payment Parameters

For recurring payments, the following parameters are passed when recurring payments are established and for each subsequent recurring payment that is processed:

- sys_tracking_id
- posting_key
- name_on_acct
- acct_addr
- acct_addr2
- acct_city
- acct_state
- acct_zip

- acct_country
- acct_email_address
- acct_phone_day
- acct_phone_night
- acct_phone_mobile
- UPAY_SITE_ID
- card_type
- pmt_amt
- recurring_payment_type
- recurring_setup_number_of_payments
- recurring_setup_start_date
- recurring_setup_end_date
- recurring_setup_frequency

And the following additional parameters are passed for each recurring payment that is processed (and not when the recurring payments are established):

- pmt_status
- pmt_date
- tpg_trans_id

10.6 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.

11.0 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.

11.1 Changing uPay Site Features

A uPay site's merchant manager or site manager 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 left navigation menu will display the settings pages for the site.

Many of the Marketplace Operations Center pages for uPay settings are the same pages used for setting up the site:

- **Payment Settings**—Change required payment and amount configuration. (See "**Payment Settings**" on page 423.)
- **Recurring Settings**—Change settings for recurring payments. (See "**Recurring Payments**" on page 434.)
- **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 436.)
- **Messages and Titles**—Change message text in your pages. (See "**Messages and Titles**" on page 446.)
- **Image Management**—Upload new site images. (See "**uPay Site Images**" on page 451.)

Some additional settings/features are outside of the uPay site creation process:

- **Style Sheets**—Download and upload the style sheet used by your uPay site. (See "**Style Sheet Modifications**" on page 484.)
- **User Maintenance**—Grant uPay user roles and edit existing users. (See "**Adding uPay Site Users**" on page 492, "**Editing uPay Site User Roles**" on page 493, and "**Deleting a uPay Site**" on page 492.)
- **Payment Search**—Search for payments, refund payments, and cancel scheduled payments. (See "**Payment Search, Refunds, and Cancellations**" on page 494.)

11.2 Style Sheet Modifications

uPay site managers can modify the layout of uPay sites by uploading a revised style sheet or by uploading a supplementary style sheet. For an example of how uPay site layout can be affected through style sheet modifications, see "[uPay Style Sheets](#)" on page 413.

The site manager begins the process of modifying a uPay style sheet by navigating to the uPay Site Style Sheets page.

[merchant name] > uPay Sites > [uPay site name] > Layout Selection

The uPay Site Style Sheets page then appears:

Donations Style Sheets

To customize the layout of your uPay site, stylesheets can be uploaded and downloaded.

uPay Style Sheet

Use this style sheet

The following selection controls how the uPay site is displayed. You can download this style sheet. Once you have uploaded a revised style sheet, you can choose which style sheet to use (the default version or the revised version) by selecting the corresponding radio button. (Filename: upay.css)

<input checked="" type="radio"/>	Default uPay style sheet	Download
<input type="radio"/>	Revised uPay style sheet	Download Upload

Supplementary Style Sheets

Use this style sheet

You can upload supplementary upay style sheets. By selecting the corresponding checkboxes, you tell upay to use these style sheets. Multiple supplementary style sheets can be used at the same time. (Limit of 5)

<input type="checkbox"/>	more.css	Download	Upload	Remove
--------------------------	----------	----------	--------	--------

Upload a supplementary style sheet:

Upload

Save

You can modify uPay site layout by using the uPay Site Style Sheets page.

The following types of style sheets can be used with a uPay site:

- **uPay Style Sheet**—The uPay Style Sheet section on this page allows you to download the default uPay stylesheet. You can also download and upload a revised uPay style sheet. The default uPay style sheet is always available for download. After you upload a revised style sheet, you use the radio buttons in the "Use this style sheet" column to select which style sheet to use with the uPay site. You can also revert to the default uPay style sheet. (Required filename: *upay.css*.)
- **Supplementary Style Sheets**—The Supplementary Style Sheets section on this page allows you to upload up to five supplementary style sheets as necessary.

Modifying the uPay Style Sheet

Use the following steps for modifying a uPay style sheet:

- 1 Click the Download button for "Default uPay style sheet" (or if you have already uploaded a style sheet, click the Download button for "Revised uPay style sheet").

Your browser's save window will then appear.

- 2 Save the file.
- 3 Open the downloaded style sheet in the editor of your choice.
- 4 Edit the styles as necessary.

Important! To ensure that Marketplace remains a secure environment for processing commerce transactions, some commonly used CSS code is not allowed in uploaded style sheets. For critical information about the validation process, see ["About the Validation Process" on page 486](#).

- 5 Save the style sheet.
 - 6 Rename the style sheet to **upay.css**.
- Note:** Only style sheets named *upay.css* can be uploaded as the revised uPay style sheet.
- 7 Click the Upload button for "Revised uPay style sheet."
The Marketplace CSS Upload window appears.
 - 8 Click the Browse button and locate the style sheet that you modified.
 - 9 Click the Upload Now button.

As part of the upload process, Marketplace validates the uploaded style sheet. Any CSS code that Marketplace considers to be invalid will not be accepted. A list of errors will be returned. You must fix these errors before Marketplace will accept your style sheet. We recommend you become proficient in authoring CSS before you attempt to upload style sheets.

Important! For critical information about the validation process, see ["About the Validation Process" on page 486](#).

- 10 Select the radio button for "Revised uPay style sheet" in order to activate your modified style sheet.
- 11 Click the Save button.

Using Supplementary Style Sheets

As an alternative to modifying the uPay style sheet, you can use the "Supplementary Style Sheets" feature to upload additional style sheets to be used by your uPay site. Supplementary style sheets can be used to override the styles in the uPay style sheet.

When the uPay site loads in the customer's browser, the uPay style sheet will load first and then the supplementary style sheets (thus overriding the uPay style sheet). Supplementary style sheets might come in handy, for example, if you want to separate uPay styles into multiple style sheets.

You can upload up to five supplementary style sheets for use by your uPay site. Use the checkboxes in the "Use this style sheet" column to select which supplementary style sheets should be active and then select the Save button.

Like the uPay style sheet, supplementary style sheets must pass a validation process before they can be uploaded. For more information about the validation process, see ["About the Validation Process" on page 486](#).

About the Validation Process

As part of the upload process, Marketplace validates the uploaded style sheet. Any CSS code that Marketplace considers to be invalid will not be accepted. A list of errors will be returned. You must fix these errors before Marketplace will accept your style sheet. We recommend you become proficient in authoring CSS before you attempt to upload style sheets.

In addition, to ensure that Marketplace remains a secure environment for processing commerce transactions, some commonly used CSS code is not allowed in uploaded style sheets.

- Position attributes with values of "absolute" or "relative"
- JavaScript
- Comments
- Any other code that TouchNet determines may potentially represent a security threat.

If any code in your style sheet does not pass the validation process, Marketplace will prompt you to edit the corresponding lines of your style sheet.

uPay HTML Structure

In order for you to understand which styles to edit when you edit a uPay stylesheet, you will need to be familiar with the underlying HTML structure that determines the uPay site layout.

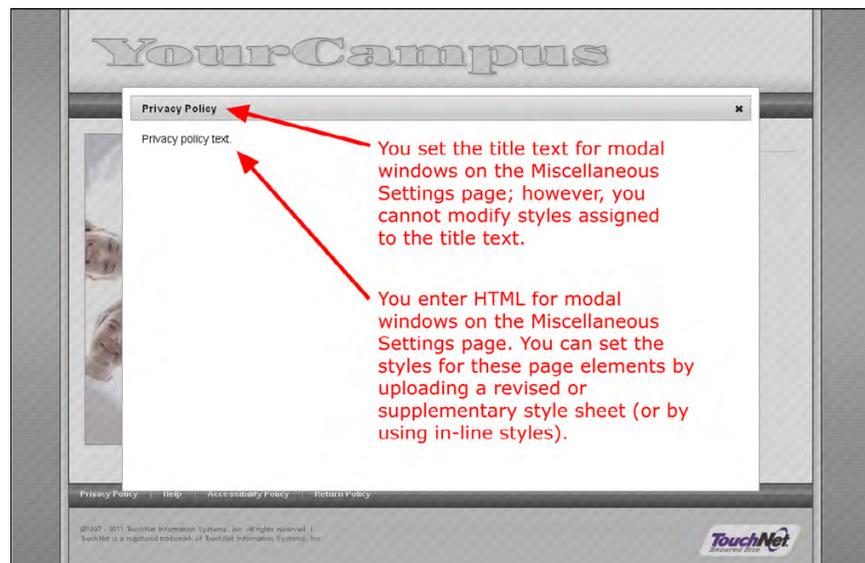
The HTML structure of uPay web pages is largely comprised of three sections:

- The first section contains the header and the main page elements. These elements appear in a DIV with id="container".
- The second section contains the footer. This element appears in a DIV with id="footer".



The main DIV on uPay web pages has an ID of "container." The footer DIV has an ID of "footer."

- The third section contains the modal windows that open when the links in the bottom navigation bar are clicked. Each of these elements appear in their own DIVs.



uPay uses modal windows for displaying additional information, such as the Privacy Policy.

HTML of the "container" DIV

In order for you to edit the layout of uPay web pages, you will need to understand how the pages are constructed. The following sample of uPay HTML shows the page elements in the "container" DIV.

```
<div id="container">
```

```

<div id="header">
  <div class="headerImage">
    
  </div><!--headerImage-->
</div><!--header-->
<div id="content" class="twoColumn">
  <div class="banner">
    
  </div>
  <div class="stdForm">
    <div id="upayHeader">Please select a payment method</div>
    <form id="pmtOptionsForm" name="pmtOptionsForm"
      action="/upay/tapp" method="post"
      class="removeExtraSpaceFromFormTags">
      <input type="hidden" name="Navigate" value="payment_
        options.jsp"/>
      <input type="hidden" name="OnError" value="payment_
        options.jsp"/>
      <input type="hidden" name="REDIRECT" value="" />
      <input type="hidden" name="STORE_PAYMENT_OPTIONS"
        value="ActionKey" />
      <p class="required">* Indicates required information</p>
      <p>
        <label for="mptOptionsPaymentAmount">
          <span class="requiredMark">*</span>
          Payment Amount:
        </label>
        <span class="currencyPrefix">$</span>
        <input id="pmtOptionsPaymentAmount" class="amount"
          type="text" name="UPAY_AMOUNT" value="10.00">
        <span class="currencySuffix"></span>
      </p>
      <div class="clear"></div>
      <p>
        <label for="pmtOptionsPaymentMethodTypeSelect">
          <span class="requiredMark">*</span>
          Payment method:
        </label>
        <select id="pmtOptionsPaymentMethodTypeSelect"
          name="GEN_PAYMENT_METHOD_TYPE_ID"
          onchange="displayRecur()">
          <option value="1" >Credit Card</option>
          <option value="3" >Electronic Check</option>
        </select>
      </p>
      <p class="yesNo">
        <span class="formLabel">
          <span class="requiredMark">*</span>
          Would you like to make recurring payments?:
        </span>
        <input type="radio"
          id="pmtOptionsRecurringPaymentYesRadioBtn"
          class="radio" name="RECURRING_PAYMENT" value="y"
          />
        <label for="pmtOptionsRecurringPaymentYesRadioBtn">
          Yes
        </label>
        <input type="radio"
          id="pmtOptionsRecurringPaymentNoRadioBtn"
          class="radio" name="RECURRING_PAYMENT" value="n"
          checked />
      </p>
    </form>
  </div>
</div>

```

```

        <label for="pmtOptionsRecurringPaymentNoRadioBtn"> No
    </label>
</p>
<div class="pageNavigation">
    <span class="continue"><a class="chk-link"
        href="javascript:continueButton()">Continue</a>
    </span>
    <span class="cancel"><a class="chk-link"
        href="javascript:cancelButton()">Cancel this
        payment transaction</a>
    </span>
    <div class="clear"></div>
</div>
</form>
</div><!--stndForm-->
<div class="clear"></div>
</div><!--content-->
<div class="push"></div>
</div><!--container-->

```

HTML of the "footer" DIV

In order for you to edit the layout of uPay web pages, you will need to understand how the pages are constructed. The following sample of uPay HTML shows all the page elements in the "footer" DIV.

```

<div id="footer">
    <ul class="footerNavigationLinks">
        <li><a href="JavaScript:openDialog('dialogPrivacy','');"
            class="footerNavigationLink">Privacy Policy</a></li>
        <li class="pipe">|</li>
        <li><a href="JavaScript:openDialog('dialogHelp','');"
            class="footerNavigationLink">Help</a></li>
        <li class="pipe">|</li>
        <li><a href="JavaScript:openDialog
            ('dialogAccessibility','');"
            class="footerNavigationLink">Accessibility
            Policy</a></li>
        <li class="pipe">|</li>
        <li><a href="JavaScript:openDialog
            ('dialogReturnPolicy','');"
            class="footerNavigationLink">Return Policy</a></li>
    </ul>
    <div class="footerImage">
        
    </div><!--footerImage-->
    <div class="footerImagePrint">
        
    </div><!--footerImagePrint-->
    <div class="footerLogo">
        
    </div>

```

```

<div class="footerLegal">
  <p>&copy;1997 - 2013 TouchNet Information Systems, Inc. All
    rights reserved. | <a
      href="http://www.touchnet.com/web/display/TN/
      Privacy+Policy" target="_blank">TouchNet Privacy
      Policy</a></p>
  <p>TouchNet is a registered trademark of TouchNet
    Information Systems, Inc.</p>
</div><!--footerLegal-->
</div><!--footer-->

```

HTML of Modal Windows

In order for you to edit the layout of uPay web pages, you will need to understand how the pages are constructed. The following example of HTML for a uPay modal window is typical for uPay. All four links (Privacy Policy, Help, Accessibility Policy, and Return Policy) in the bottom navigation bar use modal windows.

```

<div id="dialogPrivacy" class="dialog" title="Privacy
  Policy">
  <div class="storeItems noBottomBorder">
    Privacy policy text.
  </div>
</div>
</div>

```

You enter HTML for modal windows on the Miscellaneous Settings page of each uPay site. When a uPay site loads in the customer's browser, this HTML appears in the "storeItems" DIV. In order to format this HTML, you will need to assign new styles to the HTML. You can set the styles for these page elements by uploading a revised or supplementary style sheet (or by using in-line styles).

Style Sheet Image Management

If the style sheet for a uPay site references any images, a uPay site manager can upload these images by using the Style Sheet Image Management section of the uPay Site Style Sheets page:

[merchant name] > uPay Sites > [uPay site name] > Style Sheets

When this page appears, scroll down until the Style Sheet Image Management section is visible.

Style Sheet Image Management

If you choose to upload images in association with the upay site and the style sheets listed above, your context will be as follows. An example would be: `../../style_images/upay_0/background_primary.gif`

Context path:

Images

Image Name	Action
No Images	

Store managers manage images by using the Single Store Style Sheet Settings page.

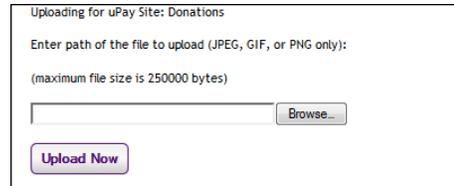
The top part of the Style Sheet Image Management section describes the context path for images. You will need to use this context path in order to reference the images that you upload.

The lower part of the Style Sheet Image Management section lists the images that have been uploaded. You can use the View button to open the Marketplace View Style Image window with the corresponding image displayed. You can use the Remove button to remove the reference to the image from the Marketplace database.

To upload an image, follow these instructions:

- 1 Select the Upload Image button.

The Marketplace Image Upload window then appears.



The Marketplace Image Upload window allows for a single image to be uploaded.

- 2 Select the Browse button.
- 3 Locate the image to be uploaded.
- 4 Select the Upload Now button.

The image name now appears in the Style Sheet Image Management section of the Single Store Style Sheet Settings page. You can use the View button to the right of the image name to view this image.

Important! Be sure to make note of the context path described in the Style Sheet Image Management section. You must have this context path in order to reference an uploaded image from a style sheet.

Important! It is your responsibility to ensure that you have all necessary rights for the images you upload. Images that you did not create (such as images on other web sites) are typically protected by copyright law and should not be uploaded for use in Marketplace unless you have received permission from the copyright holder.

11.3 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.

11.4 Deleting a uPay Site

You can delete uPay sites; however, you cannot delete a uPay site if it has accepted any transactions. If a uPay site has accepted transactions in the past but you would like to deactivate the site, you should use the site's Miscellaneous Settings page to take the uPay Site offline.

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.

11.5 Adding uPay Site Users

All users that have been added to U.Commerce are potential Marketplace users. If a user has not yet been added to U.Commerce, that user must be added to U.Commerce with U.Commerce's User Management application before that user can be configured with Marketplace roles.

Typically, not all U.Commerce users will have access to User Management in U.Commerce, so you may find the duty of creating a new U.Commerce user will need to be handed off to a User Management administrator.

Follow these steps to add a uPay site manager, payment clerk, or accountant.

Note: Only a merchant manager or uPay site manager can add uPay site users.

- 1 From the left navigation menu, navigate to Marketplace Home > [merchant] > uPay Sites > [uPay Site] > Users. The [uPay Site] Users page appears.
- 2 Click the View U.Commerce Users link near the top of the page. The U.Commerce Users page appears.

- Find the corresponding user and then click the Edit User text link in the Action column. The Edit User page appears.

Edit User

Add or remove user roles. User changes will be effective at next login.

Back To Users

User Status

Status	Enabled
--------	---------

Disable
Remove All User Roles

User Information

U.Commerce Username:	TNDV.dwilliams
First Name:	
Last Name:	
U.Commerce Email:	
Email:	

Marketplace Roles

Assigned Roles	Available Roles
None	<input type="checkbox"/> Payment Clerk
	<input type="checkbox"/> Accountant

Remove Roles
Add Roles

Note: For more information about the uPay user roles, see "[uPay User Roles](#)" on page 400.

- To add a role to the user, click the checkbox for that role in the Available Roles column. The following roles are available: Payment Clerk and Accountant.
- Click the Add Roles button.
- Notify the user that you have given them a new Marketplace role.

11.6 Editing uPay Site User Roles

Follow these steps to edit user roles for uPay site managers, payment clerks, and store accountants.

Note: Only uPay site managers can edit these roles.

- From the left navigation menu, navigate to Marketplace Home > [merchant] > uPay Sites > [uPay Site] > Users. The [uPay Site] Users by Role page appears.

- Find the corresponding user and then click the Edit User text link in the Action column. The Edit User page appears.

Edit User

Add or remove user roles. User changes will be effective at next login.

Back To Users

User Status

Status	Enabled
--------	---------

User Information

U.Commerce Username:	TNDV.gjohnson
First Name:	Gary
Last Name:	Johnson
U.Commerce Email:	gjohnson@touchnet.com
Email:	rstillwagon@touchnet.com

Marketplace Roles

Assigned Roles	Available Roles
Manager	<input type="checkbox"/> Payment Clerk
	<input type="checkbox"/> Accountant

Save

- To add a role to the user, click the checkbox for that role in the Available Roles column. The following roles are available: Store Accountant and Payment Clerk.

OR

To remove a role, click the checkbox for that role in the Assigned Roles column.

Note: For more information about the various user roles, see ["Marketplace Users" on page 14.](#)

- Click the Save button.

11.7 Payment Search, Refunds, and Cancellations

A uPay site manager, a merchant manager, and a uPay site payment clerk all have the ability to look up the records of payments submitted via uPay.

Options to refund payments or cancel upcoming recurring payments are available in the payment record details.

Customers who make recurring payments are prompted for contact information. If you need to contact a customer, you can use Payment Search to look up any e-mail address or phone number the customer may have entered.

To navigate to Payment Search, go to Marketplace Home > [merchant name] > uPay Sites > [uPay site name] > Payment Search.

Look Up a Payment

The Payment Search page allows you to search all payments for the specified uPay site. To view the Payment Search page, make the following selections in the left navigation menu:

Navigate to Marketplace Home > [merchant] > uPay Sites> [uPay site] > Payment Search.

The uPay Payment Search page provides several ways to search for payments.

Note: If you would like to search orders in multiple stores, use the search functionality available through the Marketplace Home page.

Payment Search

To use Payment Search, enter values in one or more of the following search fields and then select the Run Search button.

System Tracking ID

When a uPay payment is submitted, a System Tracking ID is assigned. This ID appears on the uPay receipt page displayed to the customer, and it is included in uPay notification e-mail message sent to the customer. To search with the System Tracking ID, you must enter a complete System Tracking ID (i.e., if you enter a partial value, you will get zero search results).

Payment Gateway Reference Number

The reference number returned by Payment Gateway after the transaction was processed. This order number appears in the confirmation e-mail

message sent to the customer. (See the note below regarding partial entries.)

Credit Card Authorization Code

The credit card authorization code is returned by Payment Gateway after the transaction is processed. This number is stored as part of the payment information in the Operations Center. (See the note below regarding partial entries.)

External Transaction ID

If the campus web application generated an ID for the transaction and passed this parameter to the uPay site, you can search for the payment by using this value. (See the note below regarding partial entries.)

Linked Session ID

uPay payments made via T-Link will have a Linked Session ID. As part of the T-Link process, this value is returned to the originating web application as the session_identifier. This field only appears if T-Link integration has been turned on for the uPay site. (See the note below regarding partial entries.)

Customer Name

The name entered by the customer as the billing name when the payment was submitted. (See the note below regarding partial entries.)

Customer Email

The e-mail address entered by the customer during the uPay payment process. (See the note below regarding partial entries.)

Customer Phone Number

The phone number entered by the customers during the uPay payment process. (See the note below regarding partial entries.)

Order Date

The date that the customer submitted the payment. If you search by Order Date, you must enter a date range by using the From and To fields. You can select a date by selecting the calendar icon.

Number of rows per page

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.

Note: You can make partial entries in the following fields: Payment Gateway Reference Number, Credit Card Authorization Code, External Transaction ID, Linked Session ID, Customer Name, Customer Email, and

Customer Phone Number. If you make a partial entry in any of these fields, all orders with matching data anywhere in the specified field will appear in the search results.

Search Results

The payment search returns records of any payments that fit the search criteria you entered.

System Tracking ID	Order Date	Customer Name	Customer Email	External Transaction ID	Processed Amount	Payment Method Name
688	04/18/2013 11:41:18 AM EDT	Bill Smith	bsmith@touchnet.com		\$52.00	Visa
692	04/18/2013 12:25:37 PM EDT	Bill Smith	bsmith@touchnet.com		\$52.00	Visa
693	04/18/2013 02:47:24 PM EDT	Bill Smith	bsmith@touchnet.com		\$240.00	Visa

Results of a payment order search

Click the System Tracking ID to see more detailed information about the payment (or to refund or cancel the transaction). The Payment Details page then appears.

Payment Details

The Payment Details page includes several sections: Order Details, Return Policy, Pending Payments, and Completed Payments.

- 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. The Refund Options page appears.

Refund Options

Enter amount of refund.

New Payment Search
Order Details

Refund Options

Item	Original Amount	Remaining Balance	Refund Amount
Donations	\$10.00	\$10.00	\$ <input style="width: 50px;" type="text"/>

Cancel
Submit

For recurring payments, the following dialog window appears.

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.

If multiple accounting codes were passed to uPay, separate amounts can be refunded for each accounting code.

- 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 495).

12.0 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.

12.1 Examples of E-mail Messages

Here is an example of a notification message for a one-time payment:

You have received this email from ims65pd@touchnet.com in response to payment processing.

Notification of Payment

This message is an automated notification to inform you that your payment has been completed successfully. Please note that all payments are subject to approval and final verification.

Payment Information:
Payment Type:Credit Card
Card Number:xxxxxxxxxxx1111
Reference Number:20130315000000
Credit Card Authorization Code:083531
Card Type:VISA
*** Card Not Present ***
System Tracking ID:193
Date/Time:March 15, 2013 8:35:31 AM CDT

Payment Gateway Reference Number:20130315000000Total Paid:\$10.00

So here is your confirmation announcement.

Thank you,
Donations

Here is an example of a refund message:

You have received this email from gjohn@touchnet.com in response to refund.

Refund Information

This message is an automated notification to inform you that your refund was processed on February 21, 2014 10:30:09 AM CST. Your credit card has been credited for a total of \$200.00.

All inquiries can be sent to gjohn@touchnet.com, please refer to System Tracking ID: 832

Thank you

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 --- 2013-12-30 01:20:08  
Amount --- $330.00  
Payment Method --- MasterCard  
Payment Gateway Reference Number --- 53565635656  
System Tracking ID --- 1113  
=====
```

Sincerely,
University Billing Department

12.2 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

Recurring payment e-mail messages can only be changed by directly editing the template files. These files can be found in the following location: `\touchnet\marketplace\sys\tmsrecur`. Look for the following three files:

- *success_template.txt*
- *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 the 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.

12.3 uPay E-mail Addresses

The e-mail addresses that will be 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	<p>The e-mail address entered in the "Site E-mail Address" field on the uPay site's Miscellaneous Settings page.</p> <p>If no e-mail address is entered in the "Site E-mail Address" field, then the e-mail address named in the uPay <i>critical.prp</i> file will be used. (The e-mail address in the <i>critical.prp</i> file was named when Marketplace was set up. If this address must be changed, you should contact your Marketplace administrator.)</p>
Recurring payment confirmation	The e-mail address named in the AliveCheck.mail.from field of the <i>tmsrecur.prp</i> 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 6:
General Ledger
Information

13.0 General Ledger Information

This user guide describes how to use the Marketplace Operations Center to create Marketplace accounting codes that are integrated with your general ledger system. The user guide describes how to turn on general ledger functionality and how to assign accounting codes to stores, products, tax rates, shipping rates, and uPay sites.

When payments are processed with uStores or uPay, the assigned accounting code values can be communicated to your general ledger system.

Instructions for general ledger integration are available for the following general ledger systems:

- [Banner by Ellucian](#)
- [Colleague by Ellucian](#)
- [PeopleSoft](#)

14.0 Setup for Banner by Ellucian

If your institution uses Banner by Ellucian, you can integrate its general ledger functionality with TouchNet Marketplace. When general ledger functionality is enabled in Marketplace, fields become available in the Marketplace Operations Center for entering Banner Detail Codes and Cashier IDs. Banner Detail Codes can be associated with Marketplace accounting codes, and in turn, Marketplace accounting codes can be associated with stores, uPay sites, products, tax rates, and delivery methods. When transactions take place, Banner Detail Codes and Cashier IDs are thus communicated to Banner for use in its general ledger module.

Integration of Banner by Ellucian and Marketplace involves the following actions: 1) configuring Payment Gateway, 2) editing the Marketplace *critical.prp* file, and 3) configuring Marketplace for using Banner by Ellucian general ledger functionality. Only the third action is covered in the Marketplace 6.5 User Guide. The first two actions (as well as the third action) are covered in the following guide: *Banner by Ellucian Setup Guide for Marketplace*.

Important! Banner Connect v6.0 must be installed in order for Marketplace to communicate with Banner by Ellucian. If you have not yet installed Banner Connect, you should contact TouchNet Customer Care about downloading the current version of Banner Connect.

Steps for Banner Setup

The following steps summarize how to use the Marketplace Operations Center to establish general ledger integration for Banner by Ellucian.

- 1 A Marketplace administrator creates common accounting codes. See ["Configuring System Administration Settings" on page 512](#).
- 2 A Marketplace administrator assigns a common accounting code to each tax class. See ["Tax Account Codes" on page 514](#).
- 3 A Marketplace administrator enters a default cashier ID. See ["Default Cashier ID" on page 513](#).
- 4 For each Marketplace merchant, a merchant manager selects which common accounting codes will be used by the merchant. See ["Configuring Merchant Settings" on page 515](#).
- 5 For each Marketplace merchant, a merchant manager adds new accounting codes, as necessary. These codes may include 1) store default accounting codes, 2) uPay site accounting codes, 3) override accounting codes to be used by products, 4) override accounting codes for delivery methods, and 5) accounting codes for tax classes. See ["Merchant Accounting Codes" on page 516](#).
- 6 For each Marketplace merchant, a merchant manager can assign an accounting code to each tax class. See ["Tax Account Codes" on page 517](#).

- 7 For each Marketplace store, a merchant manager or store manager turns on general ledger functionality, selects the default accounting code for the store, and enters a Cashier ID. See **"Configuring Store Settings" on page 518**.
- 8 For each Marketplace store, a store manager can assign override accounting codes to products, delivery methods, and tax classes. See **"Products, Shipping, and Tax" on page 519**.
- 9 For each Marketplace uPay site, a merchant manager or uPay site manager turns on general ledger functionality, selects the default accounting code, and enters a Cashier ID. See **"Configuring uPay Settings" on page 522**.

14.1 About Accounting Codes

In Marketplace, accounting codes can be established at the system administrative level and the merchant level. Accounting codes established at the system administrative level are available for all merchants, stores, and uPay sites to use. Accounting codes established at the merchant level are available for stores and uPay sites. When uStores or uPay transactions take place, information stored with these accounting codes—including Banner Detail Codes—is sent to your Banner by Ellucian system.

Who Creates Accounting Codes?

Marketplace 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 512**), and merchant managers create merchant-level accounting codes, which are only available for each merchant's own stores and uPay sites (see **"Merchant Accounting Codes" on page 516**).

Common accounting codes are typically assigned to tax classes (see **"Tax Account Codes" on page 514**). 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 515**).

New accounting codes are established by merchant managers for five reasons:

- To serve as the default accounting code used by a store (see **"Configuring Store Settings" on page 518**),
- To associate with tax codes (see **"Products, Shipping, and Tax" on page 519**),
- To serve as the accounting code used by one or more uPay sites (see **"Configuring uPay Settings" on page 522**),

- To serve as an override accounting code used by one or more products in a store (see "[Products, Shipping, and Tax](#)" on page 519), and
- To serve as an override accounting code assigned to a delivery method in a shipping class (see "[Products, Shipping, and Tax](#)" on page 519).

Accounting code fields are only available in stores and uPay sites if general ledger reporting has been enabled.

About Banner Detail Codes

For Banner by Ellucian general ledger reporting, Marketplace accounting codes are tied to Banner Detail Codes. When Marketplace stores or uPay sites use general ledger functionality, the associated Detail Codes are passed to the Banner by Ellucian system when transactions take place.

Marketplace accounting codes are created by administrators and merchant managers. Each accounting code is associated with a Detail Code (which must come from a list of approved Detail Codes prepared by your institution's Banner administrator). As each Banner Detail Code is entered in Marketplace, it is validated with your Banner by Ellucian system.

During the Marketplace uStores fulfillment process, the detail code is passed to your Banner by Ellucian system. Likewise, when uPay transactions are processed, the associated detail code is passed to your Banner by Ellucian system.

Important! Before a Marketplace accounting code can be established you must ensure a 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 by Ellucian administrator if a new Detail Code is required.

About Cashier IDs

The Banner general ledger system uses Cashier IDs. These IDs can be used by Banner for identifying the source of Marketplace transactions.

A default Cashier ID is assigned by the Marketplace administrator (see "[Configuring System Administration Settings](#)" on page 512) and can apply to all the Marketplace stores and uPay sites. However, each store or uPay site can also have its own Cashier ID. If a merchant manager or store manager assigns a Cashier ID to a store (see "[Configuring Store Settings](#)" on page 518), this value overrides the default Cashier ID that was assigned at the administrative level. Likewise, if a uPay site manager assigns a Cashier ID to a uPay site, this value overrides the default Cashier ID assigned at the administrative level.

You should contact your Banner by Ellucian administrator for information about how Cashier IDs should be used.

14.2 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 and uPay sites to use. These accounting codes are called "common" accounting codes.

Here are descriptions of how to configure the system administration settings for general ledger functionality.

Common Accounting Codes

In the system administration settings, a Marketplace administrator can create a common accounting code and associate it with a Banner Detail Code.

The following table describes how to create a common accounting code.

<p>Configuration Setting for Banner: Adding Common Accounting Codes</p>
--

<p>Description: Marketplace administrators can set up common accounting codes for use by Marketplace stores.</p>

<p>Left Navigation Menu: Marketplace Home > System Administration > Settings > Accounting Codes.</p>
--

<p>Page: Displays the Marketplace Accounting Codes page.</p>

Configuration Setting for Banner: Adding Common Accounting Codes

Description: Marketplace administrators can set up common accounting codes for use by Marketplace stores.

Actions: The Marketplace Accounting Codes page lists all the common accounting codes that have currently been established for use by Marketplace.

To add a new accounting code, select the Add Common Accounting Code button, which displays the Add New Common Accounting Code page. Enter an approved Banner Detail Code in the Banner Detail Code field. (You will need to contact your institution’s Banner by Ellucian 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 "Accounting Codes in Use" table.

Default Cashier ID

In the system administration settings, a Marketplace administrator can assign a default cashier ID.

The following table describes the Default Cashier ID field.

<p>Configuration Setting for Banner: Enter a Default Cashier ID</p> <p>Description: Marketplace administrators can set up a default cashier ID available for all Marketplace stores.</p>
<p>Left Navigation Menu: Marketplace Home > System Administration > Settings > General.</p>
<p>Page: Displays the Marketplace General Settings page.</p>
<p>Actions: Look for the Default Cashier ID field. Enter a code (30 characters maximum) in this field. This value will be passed to Banner by Ellucian. An override value can be set for stores and uPay sites.</p>


Tax Account Codes

In the system administration settings, a Marketplace administrator can also assign accounting codes to tax classes.

The following tables describe those system administration settings which affect tax account codes.

<p>Configuration Setting: Establishing Tax Account Codes</p> <p>Description: Marketplace administrators can link accounting codes to tax classes, and these tax classes can be used for all Marketplace stores.</p>
<p>Left Navigation Menu: Marketplace Home > System Administration > Settings > Tax Account Codes.</p>
<p>Page: Displays the Marketplace Tax Account Codes page.</p>

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.

Tax Class Id	Tax Class Name	Accounting Code
0	no tax	<input type="text"/>
1	default tax rate	State and Local Taxes
2	higher tax rate	State and Local Taxes

Save Reset

Accounting codes can also be assigned to tax classes at the merchant level and the store level. If accounting codes have been assigned to tax classes at either the merchant level or the store level, then these accounting codes will override the accounting codes assigned at the administrative level. If no accounting codes are assigned to tax classes at either the merchant level or the store level, then the store reports tax revenue using the accounting codes assigned for taxes at the administrative level.

Note: Stores that use the Marketplace tax service never use the "higher tax rate": The tax service only uses the "no tax" and "default tax rate" tax classes. The higher tax rate is only available with campus-maintained tax rate files. For more about the Marketplace tax service, see **"Taxes" on page 238**.

14.3 Configuring Merchant Settings

Before a store or uPay site can use a common accounting code, the code must first be "enabled" by the 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 an individual merchant's stores and uPay sites.

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.

Left Navigation Menu: Marketplace Home > [merchant] > Accounting Codes.

Page: Displays the [Merchant] Accounting Codes page.

Actions: The [Merchant] Accounting Codes page lists the common accounting codes that are available for use by the merchant.

By selecting accounting codes in the "Available Common Accounting Codes" list box and clicking the Add button, 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.

Merchant Accounting Codes

In addition to the common accounting codes established at the system administration level, Marketplace merchants can create accounting codes that will be used only by the merchant's stores and uPay sites.

The following table describes how to add new accounting codes.

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.

Left Navigation Menu: Marketplace Home > [merchant] > Accounting Codes.

Page: Displays the [Merchant] Accounting Codes page.

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.

Actions: The top portion of the Merchant Accounting Codes page lists the common accounting codes that are available for use by the merchant, while the bottom portion lists all the merchant accounting codes that have currently been established for use by this merchant. To add a merchant accounting code for use by only this merchant's stores and uPay sites, select the Add Accounting Code button. The Add a New Accounting Code page appears.

Enter an approved Banner Detail Code in the Banner Detail Code field, and enter a name for the accounting code (25 characters maximum) in the New Accounting Code Name field. The name you assign must be unique. Names already used are displayed in the "Current Accounting Code Names in Use" table.

Tax Account Codes

In the merchant settings, a Marketplace merchant manager can assign accounting codes to tax classes. These accounting codes will be reported when taxes are assessed on uStores transactions.

The following table describes the merchant settings that affect tax account codes.

Configuration Setting: Establishing Tax Account Codes

Description: Marketplace merchant managers can link accounting codes to tax classes at the merchant level. These tax classes are then available for use by the merchant's stores.

Left Navigation Menu: Marketplace Home > [merchant] > Tax Account Codes.

Page: Displays the [Merchant] Tax Account Codes page.

Configuration Setting: Establishing Tax Account Codes

Description: Marketplace merchant managers can link accounting codes to tax classes at the merchant level. These tax classes are then available for use by the merchant's 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.

The screenshot shows a web interface for configuring tax account codes. The title is "Alumni Tax Account Codes". Below the title is a yellow banner with the text: "You can override the Mall settings for all Stores in this Merchant by selecting an accounting code for each tax class." In the top right corner of the interface is a "Print Page" button with a printer icon. Below the banner is a table with the following structure:

Tax Class Name	Accounting Code
no tax	[Dropdown Menu]
default tax rate	[Dropdown Menu]
higher tax rate	[Dropdown Menu]

At the bottom of the table are two buttons: "Save" and "Reset".

Accounting codes can also be assigned to tax classes at the store level. Accounting codes assigned for taxes at the store level will override the accounting codes assigned for taxes at the merchant level. If no accounting codes are assigned to tax classes at either the merchant level or the store level, then the store reports tax revenue using the accounting codes assigned for taxes at the administrative level.

Note: Stores that use the Marketplace tax service never use the "higher tax rate": The tax service only uses the "no tax" and "default tax rate" tax classes. The higher tax rate is only available with campus-maintained tax rate files. For more about the Marketplace tax service, see **"Taxes" on page 238**.

14.4 Configuring Store Settings

Before Banner Detail Codes are reported with transactions, a merchant manager or store manager must turn on the Perform General Ledger Updates option. This option is located on the Store General Settings page. In addition, a merchant manager or store manager can select the default accounting code and enter a Cashier ID.

A store manager can select an accounting code override to use 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 and the accounting codes to use with taxes.

<p>Configuration Setting: Turning On General Ledger Functionality</p> <p>Description: A Marketplace merchant manager or store manager can turn on general ledger functionality and select a default accounting code to be used for transactions at a store.</p>
<p>Left Navigation Menu: Marketplace Home > [Merchant] > Stores > [Store Name] > Store Settings > General.</p>
<p>Page: Displays the [Store Name] General Settings page.</p>
<p>Actions: To turn on general ledger functionality for a store, select Yes for Perform General Ledger Updates.</p> <p>If you turn on general ledger functionality, enter a Cashier ID in the Cashier ID field. The value you enter in this field overrides the Cashier ID you entered on the Marketplace General Settings page.</p> <p>You must also select an accounting code from the Default Accounting Code 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.</p> <div data-bbox="566 993 1325 1136" style="border: 1px solid black; padding: 5px;"> <p>Accounting code is required to complete updates to the General Ledger.</p> <p>Perform General Ledger Updates: <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Cashier ID: <input type="text"/></p> <p>Default Accounting Code: <input type="text"/></p> </div>

Products, Shipping, and Tax

Several additional general ledger settings can be configured at the store level: accounting code overrides can be assigned to products and delivery methods, and accounting codes can be assigned to store taxes. These configuration settings are discussed in the following tables.

<p>Configuration Setting: Selecting an Accounting Code Override for a Product</p> <p>Description: A Marketplace store manager can assign an accounting code override to a product.</p>
<p>Left Navigation Menu: Marketplace Home > [Merchant] > Stores > [Store Name] > Store Settings > Products.</p>
<p>Page: Displays the [Store Name] Products page.</p>

Configuration Setting: Selecting an Accounting Code Override for a Product

Description: A Marketplace store manager can assign an accounting code override to a product.

Actions: For existing products, click a product name to display the associated [Store Name] Product Settings page. The store's default accounting code will be used unless you have selected an accounting code override for the product. To use an override, select an accounting code from the Override Default Accounting Code 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.

Note: You can also select an accounting code override when you add a new product. Select the Add Product button on the [Store Name] Products page, which starts the Add Product Wizard. Step 2 of the wizard displays the Override Accounting Code dropdown menu. You can also set an accounting code override when importing a product list. For more information, see ["Importing Product Lists" on page 261](#).

Configuration Setting: Selecting an Accounting Code Override for a Delivery Method

Description: A Marketplace store manager can associate an accounting code with a delivery method in a shipping class.

Left Navigation Menu: Marketplace Home > [Merchant] > Stores > [Store Name] > Store Settings > Shipping Classes.

Page: Displays the [Store Name] Shipping Classes page.

Configuration Setting: Selecting an Accounting Code Override for a Delivery Method

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 Classes page. To select an override for a delivery method, select an accounting code from the Accounting Code Override dropdown menu.

Shipping Class: regular

All charges are in USD (\$)

Delivery Method	Enable	Base Charge	Additional Item Charge	Shipping Address Required	Allowed Countries	Tax Class	Accounting Code Override
None	<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>	N/A	default tax rate	
Walk-In	<input checked="" type="checkbox"/>	0.00	0.00	<input type="checkbox"/>	N/A	default tax rate	
USPS First-Class Mail	<input checked="" type="checkbox"/>	0.00	0.00	<input checked="" type="checkbox"/>	Select Countries	default tax rate	
USPS Priority Mail	<input checked="" type="checkbox"/>	0.00	0.00	<input checked="" type="checkbox"/>	Select Countries	default tax rate	
USPS Express Mail	<input checked="" type="checkbox"/>	0.00	0.00	<input checked="" type="checkbox"/>	Select Countries	default tax rate	

Default Delivery Location:

City:

State:

ZIP / Postal Code:

All U.S. States, Territories and Armed Forces must use ZIP-4 (format: XXXXX-XXXX).

[Save regular Shipping Class](#)

Configuration Setting: Selecting an Accounting Code for a Tax Class

Description: Marketplace store managers can link accounting codes to tax classes for individual stores.

Left Navigation Menu: Marketplace Home > [merchant] > Stores > [store] > Tax Account Codes.

Page: Displays the [Store Name] Tax Account Codes page.

Configuration Setting: Selecting an Accounting Code for a Tax Class

Description: Marketplace store managers can link accounting codes to tax classes for individual stores.

Actions: This page lists three tax classes: no tax, default tax rate, and higher tax rate.

Tax Account Codes	
Tax Class Name	Accounting Code
no tax	<input type="text"/>
default tax rate	<input type="text"/>
higher tax rate	<input type="text"/>

You can assign an accounting code to each tax class by choosing from the Accounting Code dropdown menus.

If no accounting codes are assigned to the tax classes, then the store reports tax revenue using the accounting codes configured at the merchant level.

Note: Stores that use the Marketplace tax service never use the "higher tax rate": The tax service only uses the "no tax" and "default tax rate" tax classes. The higher tax rate is only available with campus-maintained tax rate files. For more about the Marketplace tax service, see ["Taxes" on page 238](#).

14.5 Configuring uPay Settings

In order for general ledger codes to be reported to Banner for uPay transactions, a merchant manager or uPay site 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. In addition, a cashier ID must be entered. The accounting code and cashier ID are then reported with each uPay transaction that takes place.

Configuration Setting: Selecting a uPay Site Accounting Code

Description: A Marketplace merchant manager or uPay site manager can turn on general ledger functionality and select an accounting code to be used for all transactions at a uPay site.

Left Navigation Menu: Marketplace Home > [Merchant] > uPay Sites > [uPay Site Name] > Payment Settings.

Configuration Setting: Selecting a uPay Site Accounting Code

Description: A Marketplace merchant manager or uPay site manager can turn on general ledger functionality and select an accounting code to be used for all transactions at a uPay site.

Page: Displays the [uPay Site] Payment Settings page.

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 enter a Cashier ID and 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.

Passing Parameters to uPay

Campus web applications and TouchNet Ready Partner web applications can pass parameters to 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. All these parameters are discussed in "[Passing Parameters to Your uPay Site](#)" on page 456.

Two parameters are available exclusively with Banner by Ellucian general ledger integration: CREDIT_ACCT_CODE and DEBIT_ACCT_CODE (Field length: unlimited; Data type: alphanumeric). These values must be approved Banner detail codes. If these values are passed to uPay, the passed CREDIT_ACCT_CODE value will override the accounting code configured for the uPay site, and the passed DEBIT_ACCT_CODE will override the value configured in Payment Gateway for the payment method.

14.6 Configuring An Authentication Method for Banner

By establishing a user group for Banner by Ellucian, access to Marketplace stores can be restricted. This functionality can be used to create private stores, in which only users identified by your Banner by Ellucian system can view specified stores or make purchases from these stores. If your institution does not want to use authentication for Banner by Ellucian, you do not need to perform the steps described in this section.

Important! Before you can establish an authentication method for Banner by Ellucian, the *bannerconnect.prp* file must be edited. See the *Banner by Ellucian Setup Guide for Marketplace* for more information.

To add an authentication method for Banner by Ellucian:

- 1 From the left navigation menu in the Marketplace Operations Center, navigate to Marketplace Home > System Administration > User Settings > User Authentication. The Marketplace User Authentication page appears.
- 2 Click the Add New Authentication Method link. The Add a New Authentication Method page appears.

Add A New Authentication Method

Before you can create a new group, you must create an XML transaction for authentication of group members. The transaction must be defined with a unique code in the Transaction Manager's transaction attributes table.

[Back To User Authentication](#)

Authentication Method Settings

Name:	<input type="text"/>
Description: (maximum of 500 characters)	<input style="width: 100%;" type="text"/>
Contact the system administrator for transaction code values.	
Transaction code:	<input type="text"/>
TransMgr:	tpg <input type="button" value="v"/>
Instructions to Buyer: (maximum of 2000 characters)	<input style="width: 100%;" type="text"/>
Logon prompt:	<input type="text"/>
Password prompt:	<input type="text"/>
Request XML logon tag name:	<input type="text"/>
Request XML password tag name:	<input type="text"/>
Response XML output tag name:	<input type="text"/>
Response XML output tag type:	Value <input type="button" value="v"/>

[Save](#)

- 3 Complete the fields as described below in "Field Definitions," and then click the Save button.

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 following code: **17412**

TransMgr

Make the following selection: **tpg**

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 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**

Note: The values for the XML fields are case sensitive. (For example, "STUDENT_ID" does not equal "student_id".)

14.7 Maintaining Accounting Codes

If a Banner Detail Code changes that you use with a Marketplace accounting code, you must edit the accounting code so that it uses the new Detail Code value.

Configuration Setting to Maintain: Common Accounting Codes

Description: Marketplace administrators can edit and delete common accounting codes.

Left Navigation Menu: Marketplace Home > System Administration > Settings > Accounting Codes.

Page: Displays the Marketplace Accounting Codes page.

Actions: To edit an accounting code, select the corresponding Edit link in the Actions column. The Delete link on the Marketplace Accounting Codes page is only active for accounting codes that are not currently in use.

Name	In Use	Actions
Miscellaneous revenue	Yes	Edit Delete
State and Local Taxes	Yes	Edit Delete

You can also select the Show Merchant Accounting Codes button to view a list of all the accounting codes that have been set up for each merchant.

When you select the Edit link in the Actions column, the Edit Common Accounting Code page appears for the corresponding accounting code. To edit a common accounting code, enter an approved Banner Detail Code in the Banner Detail Code field. You can also edit the name for the accounting code (25 characters maximum). The name you assign must be unique. Names already used are displayed in the "Current Accounting Code Names in Use" table. When you edit an accounting code, anywhere this accounting code is being used will be updated with the new information (including the new Detail Code value and the updated accounting code name).

Current Accounting Code Names In Use	
State and Local Taxes	

Configuration Setting to Maintain: Merchant Accounting Codes

Description: Merchant managers can enable existing common accounting codes and edit merchant-specific accounting codes.

Left Navigation Menu: Marketplace Home > [Merchant] > Accounting Codes.

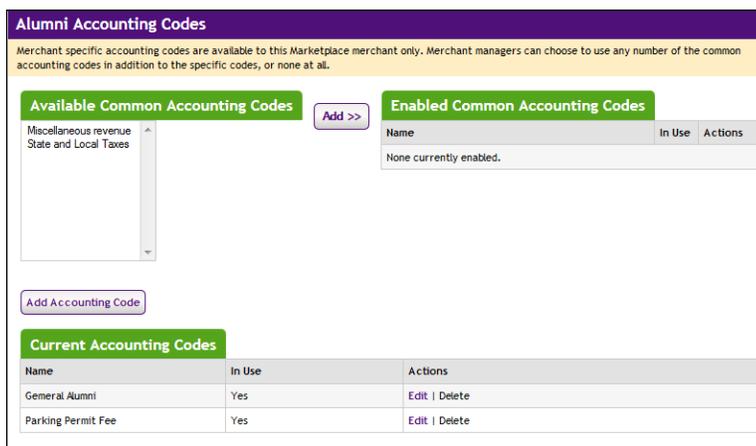
Page: Displays the Merchant Accounting Codes page.

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 "Available Common Accounting Codes" 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 or uPay sites. To remove an enabled common accounting code from this page, select the corresponding accounting code name and click the Remove button.

To edit a merchant accounting code (for example, to update the Detail 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.



When you select the Edit link to edit an accounting code, the Edit Accounting Code page appears. Enter an approved Banner Detail Code in the Banner Detail Code field. (You will need to contact your institution's Banner by Ellucian administrator for a list of the approved Detail Codes.) Enter a name for this code in the Accounting Code Name field (25 characters maximum). The name you assign must be unique. Names already used are displayed in the "Current Accounting Code Names in Use" table. When you edit an accounting code, anywhere this accounting code is being used will be updated with the new information (including the new Detail Code value and the updated accounting code name).

Configuration Setting to Maintain: Merchant Accounting Codes

Description: Merchant managers can enable existing common accounting codes and edit merchant-specific accounting codes.

Edit Accounting Code

Edit accounting code and name

Print Page 

[Back To Accounting Codes](#)

Accounting Code

Banner Detail Code:	<input type="text" value="PARK"/>
Accounting Code Name:	<input type="text" value="Parking Permit Fee"/>

[Save](#)

Current Accounting Code Names In Use

Note: Accounting code names must be unique (case-insensitive). Listed below are the names already being used.

General Alumni

14.8 Using Departmental Charges

Once Banner by Ellucian general ledger integration has been established, Marketplace can be configured to accept "departmental charge" as a payment method. This payment method allows uStores customers to transfer budget funds between Banner by Ellucian general ledger accounts.

The departmental charge payment method can be activated for specific user groups and specific products. When departmental charge is available for a product, authenticated members of specified user groups are then given the option of using departmental charge as a payment method.

When the buyer chooses to pay via departmental charge, the buyer must enter a Banner Detail Code in order to complete the transaction. Other Detail Code information may be required, depending on how the Detail Code was configured in Banner by Ellucian. Marketplace will then forward instructions to Banner by Ellucian for the specified Detail Code to be debited for the transaction amount.

The following sections describe the necessary configuration steps for establishing departmental charge as a payment method.

About User Groups

To confirm that buyers are authorized to use departmental charge, you will likely want to use Marketplace's user group functionality.

In the store settings of the Marketplace Operations Center, a Marketplace store manager (or merchant manager) can set up a store to allow specific user groups. These user groups are created at the system administration level. Authentication methods can be used with user groups to determine (via a login name and password) if the user is an authorized member of the user group. For more about establishing authentication methods, see ["Configuring An Authentication Method for Banner" on page 523](#).

The departmental charge payment method can then be made available only to members of a specific user group. Meanwhile, other shoppers who are not members of this user group will be able to shop at the store, but they will not see departmental charge as a payment method.

For example, a store could be established for office supplies. Students may want to use this store to buy notebooks, pencils, computer supplies, etc. Staff might use this same store to buy supplies for campus departments. Students would typically be limited to credit card or ACH as the payment methods. However, buyers who have been authenticated as members of the staff user group would have the option to use the departmental charge payment method to transfer funds between campus departments.

In addition, you may consider using departmental charges with private stores. Private stores are only available to users in specific user groups. For more about user groups and private stores, see ["User Groups and Private Stores" on page 357](#).

About Payment Gateway Configuration

In addition to the configuration described in the Marketplace User's Guide (which is restricted to the steps that involve the Marketplace Operations Center), you must also use Payment Gateway to create a user-defined payment method for departmental charge, and this payment method must then be linked to the Payment Gateway host system account that is used by Marketplace. This configuration is described in the *Banner by Ellucian Setup Guide for Marketplace*.

Configuring Administration Settings

In the system administration settings of the Marketplace Operations Center, a Marketplace administrator sets up Marketplace to use the departmental charge payment method that you created in Payment Gateway. The following settings are at the administrative level.

Configuration Setting: Turning on departmental charge

Description: Marketplace administrators must activate departmental charge functionality so that it is available for stores to utilize.

Left Navigation Menu: Marketplace Home > System Administration > Settings > General.

Configuration Setting: Turning on departmental charge

Description: Marketplace administrators must activate departmental charge functionality so that it is available for stores to utilize.

Page: Displays the Marketplace General Settings page.

Actions: Once Marketplace has been configured to use Banner by Ellucian, four new fields appear on the Marketplace General Settings page.

Departmental Charge	
Use payment method Departmental Charge:	<input type="checkbox"/>
User enters Detail Code:	<input type="checkbox"/>
Payment Gateway User Defined Payment Method Id:	<input type="text"/>
Payment Method Detail Code:	<input type="text"/>

The administrator turns on departmental charge by selecting the checkbox for **Use payment method Departmental Charge**.

Once turning on the Departmental Charge payment method, the administrator must choose whether customers are required to enter a Detail Code during the uStores checkout process. To require the customer to enter a Detail Code, select the **User enters Detail Code** checkbox. Here are the effects of using this option:

- If you turn on this option, the customer is required to enter a Detail Code during the uStores checkout process. The customer will see a Detail Code field after they choose Departmental Charge as the payment method. After the customer enters a Detail Code, Marketplace submits the Detail Code to Banner in order to retrieve the full FOPAL. Then the customer can review the FOPAL field values before proceeding with the order.
- If you do not turn on this option, the customer is not required to enter a Detail Code during the checkout process. Instead, a default Detail Code value is used, and this value is configured by an administrator. The administrator must enter a Detail Code in the **Payment Method Detail Code** field. This Detail Code will automatically be sent to Banner when the customer selects Departmental Charge as the payment method during the uStores checkout process. The full set of FOPAL fields are then displayed for the customer to review. In this way, you can ensure customers always use the correct Detail Code.

The administrator must also enter the ID for the departmental charge payment method. This value was established during Payment Gateway configuration. Enter the departmental charge payment method ID in the **Payment Gateway User Defined Payment Method ID** field. You can get this value from the Payment Gateway administrator who configured the Department Charge payment method (as described in the *Banner by Ellucian Setup Guide for Marketplace*).

Configuring Store Settings

The only store-level settings for departmental charge involve user groups. It is advisable to use user groups with departmental charge. By using user groups, you can determine if the buyers are authorized to use the departmental charge payment method.

In the store settings of the Marketplace Operations Center, a Marketplace store manager (or merchant manager) can set up a store to allow specific user groups. These user groups are created at the system administration level. Authentication methods can be used with user groups to determine (via a login name and password) if the user is an authorized member of the user group. For more about establishing authentication methods, see **"Configuring An Authentication Method for Banner" on page 523.**

In addition, you may consider using departmental charges with private stores. Private stores are only available to users in specific user groups. For more about private stores and user groups, see the *Marketplace 6.5 User's Guide*.

Configuration Setting: Allowed User Groups

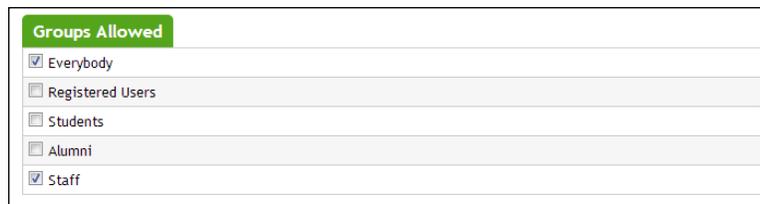
Description: Marketplace store managers (or merchant managers) can determine which user groups are allowed to use specific stores.

Left Navigation Menu: Marketplace Home > [merchant] > Stores > [store] > Store Settings > Allowed Groups.

Page: Displays the Groups Allowed page.

Actions: The Groups Allowed page is only indirectly related to departmental charge. However, this page is important if you choose to restrict use of the departmental charge payment method to specific user groups.

This page lists all the user groups that have been created. These user groups are created at the system administration level. On the Groups Allowed page, you simply select the checkboxes for each user group that should be allowed to make purchases from the store.



Groups Allowed	
<input checked="" type="checkbox"/>	Everybody
<input type="checkbox"/>	Registered Users
<input type="checkbox"/>	Students
<input type="checkbox"/>	Alumni
<input checked="" type="checkbox"/>	Staff

By selecting user groups on this page, these user groups then appear on the Group Payment Methods page--which is where you will determine which payment methods (including departmental charge) are allowed for each user group.

Configuration Setting: Group Payment Methods

Description: Marketplace store managers (or merchant managers) can select which payment methods are allowed for each allowed user group.

Left Navigation Menu: Marketplace Home > [merchant] > Stores > [store] > Store Settings > Group Payment Methods.

Page: Displays the Payment Methods Allowed page.

Actions: After using the Groups Allowed page to designate which user groups will be allowed to make purchases from the store, the allowed user groups then appear on the Payment Methods Allowed page.

Here, you simply select which payment methods to use with each user group.

Payment Methods	
Group	Payment Methods Allowed
Everybody	<input checked="" type="checkbox"/> AmEx <input type="checkbox"/> Departmental Charge <input checked="" type="checkbox"/> Discover <input type="checkbox"/> INTERAC <input checked="" type="checkbox"/> MasterCard <input checked="" type="checkbox"/> Visa <input checked="" type="checkbox"/> webCheck
Staff	<input type="checkbox"/> AmEx <input checked="" type="checkbox"/> Departmental Charge <input type="checkbox"/> Discover <input type="checkbox"/> INTERAC <input type="checkbox"/> MasterCard <input type="checkbox"/> Visa <input type="checkbox"/> webCheck

In the example above, users in the Everybody group will be allowed to make credit card and ACH payments, but these users will NOT be allowed to use departmental charge. Meanwhile, the Staff user group has been configured for using departmental charge.

Configuring Product Settings

Product level configuration for departmental charge is limited to a single group of settings: the Allowed Payment Methods on the Product Details page. Before departmental charge will be displayed to buyers during the checkout process, you must select departmental charge as an allowable payment method for each product that should be available to buyers via departmental charge.

Configuration Setting: Allowed Payment Methods (Product Details)

Description: Marketplace store managers or store clerks can specify which payment methods are allowable for each product.

Left Navigation Menu: Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products.

Page: Displays the Products page.

Actions: You must edit each product that needs departmental charge available as a payment method. On the Products page, click the product name and the Product Details page for that product will appear.

Note: If you do not see the desired product listed on the Products page, the product might be in a store product category. Use the Category dropdown menu to select the corresponding category.

Be sure to select all the payment methods that should be allowed for the product.

You can further restrict which payment methods are available to users by using the Group Payment Methods page, as described in "[Configuring Store Settings](#)" on page 532. For example, you can specify that the user group of Everybody can use credit card and ACH but NOT departmental charge. However, you can also specify that the user group of Staff CAN use departmental charge. Therefore, the vast majority of users will not see departmental charge offered as a payment method. Only authenticated members of the Staff user group will be able to use departmental charge.

What Customers See

Once departmental charge configuration has been completed, this payment method is available for the corresponding user groups. (For more about store settings and user groups, see "[Configuring Store Settings](#)" on page 532.)

When a customer selects Departmental Charge as the payment method, the response by the checkout process depends upon the selection that the Marketplace administrator made on the Marketplace General Settings page for the **User enters Detail Code** option:

- If this option was turned on, the customer is required to enter a Detail Code during the uStores checkout process. The customer will see a Detail Code field after they choose Departmental Charge as the payment method. After the customer enters a Detail Code, Marketplace submits the Detail Code to Banner in order to retrieve the full FOPAL. Then the customer can review the FOPAL field values before proceeding with the order.
- If this option was NOT turned on, the customer is not required to enter a Detail Code during the checkout process. Instead, a default Detail Code value is used, and this value was configured by an administrator on the Marketplace General Settings page. This Detail Code is then automatically sent to Banner when the customer selects Departmental Charge as the payment method. The full set of FOPAL fields are then displayed for the customer to review. In this way, you can ensure customers always use the correct Detail Code.

Here is an example of what customers will see during the uStores checkout process. This example assumes the **User enters Detail Code** option has been turned on. When Departmental Charge is available as a payment method, the customer will see a Departmental Charge section on the Payment Method page.



The screenshot shows a section titled "Departmental Charge". Below the title is a radio button with the label "Pay with Departmental Charge". Below that is a text input field with the label "*Detail Code:".

The Departmental Charge option appears on the Payment Method page of the uStores checkout process.

The customer must select the "Pay with Departmental Charge" radio button. Then, (if **User enters Detail Code** is turned on) the customer must enter an appropriate Banner Detail Code. This code is for the account that will be debited for the transaction.

Subsequently, the buyer will see additional fields, depending on how the Banner Detail Code has been configured. Here is an example of what the buyer might see:

Detail Code Information	
Verify or enter required detail code information.	
	*Indicates required information
*Detail Code:	MISC
Detail Code Description:	Miscellaneous Income
*COA:	L
Index:	654321
*FUND:	10000
ORGN:	00000
*ACCT:	59200
PROG:	00000
ACTV:	
LOCN:	
*RUCL:	CHS1

Additional Detail Codes may be required, depending on how the Banner detail code has been configured.

Additional required Detail Code fields might include a fund code or an account code or any other field as configured in Banner by Ellucian.

Important! To use the departmental charge payment method, customers must have instructions from the Banner by Ellucian administrator regarding the appropriate Banner Detail Codes and any other required detail code entry fields and values. Without this information, customers will NOT be able to use the departmental charge payment method.

15.0 Setup for Colleague by Ellucian

If your institution uses Colleague by Ellucian, you can integrate its general ledger functionality with TouchNet Marketplace. When general ledger functionality is enabled in Marketplace, fields become available in the Marketplace Operations Center for entering Colleague by Ellucian general ledger codes. Colleague Codes can be entered as Marketplace accounting codes and in turn associated with stores, uPay sites, products, tax rates, and delivery methods. In addition, GL Distribution Codes can be associated with stores and uPay sites. When transactions take place, Colleague Codes and GL Distribution Codes are communicated to Colleague for use in its general ledger module.

Integration of Colleague by Ellucian and Marketplace involves the following actions: 1) configuring Payment Gateway, 2) editing the Marketplace *critical.prp* file, and 3) configuring Marketplace for using Colleague by Ellucian general ledger functionality. Only the third action is covered in the Marketplace 6.5 User Guide. The first two actions (as well as the third action) are covered in the following guide: *Colleague by Ellucian Setup Guide for Marketplace*.

Important! Colleague Connect v6.0 must be installed in order for Marketplace to communicate with Colleague by Ellucian. If you have not yet installed Colleague Connect, you should contact TouchNet Customer Care about downloading the current version of Colleague Connect.

Steps for Colleague Setup

The following steps summarize how to use the Marketplace Operations Center to establish general ledger integration for Colleague by Ellucian.

- 1 A Marketplace administrator creates common accounting codes. See "[Configuring System Administration Settings](#)" on page 540.
- 2 A Marketplace administrator assigns a common accounting code to each tax class. See "[Tax Account Codes](#)" on page 542.
- 3 For each Marketplace merchant, a merchant manager selects which common accounting codes will be used by the merchant. See "[Configuring Merchant Settings](#)" on page 543.
- 4 For each Marketplace merchant, a merchant manager adds new accounting codes, as necessary. These codes may include 1) store default accounting codes, 2) uPay site accounting codes, 3) override accounting codes to be used by products, 4) override accounting codes for delivery methods, and 5) accounting codes for tax classes. See "[Merchant Accounting Settings](#)" on page 543.
- 5 For each Marketplace merchant, a merchant manager can assign an accounting code to each tax class. See "[Tax Account Codes](#)" on page 544.

- 6 For each Marketplace store, a merchant manager or store manager turns on general ledger functionality, selects the default accounting code for the store, and enters a GL Distribution Code. See ["Configuring Store Settings" on page 545](#).
- 7 For each Marketplace store, a store manager can assign override accounting codes to products, delivery methods, and tax classes. See ["Products, Shipping, and Tax" on page 547](#).
- 8 For each Marketplace uPay site, a merchant manager or uPay site manager turns on general ledger functionality, selects the default accounting code, and enters a GL Distribution Code. See ["Configuring uPay Settings" on page 549](#).

15.1 About Accounting Codes

In Marketplace, accounting codes can be established at the system administrative level and the merchant level. Accounting codes established at the system administrative level are available for all merchants, stores, and uPay sites to use. Accounting codes established at the merchant level are available for stores and uPay sites. When a uStores or uPay transaction takes place, transaction information is sent to your Colleague by Ellucian system. This information includes the Colleague Code.

Who Creates Accounting Codes?

Marketplace 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 540](#)), and merchant managers create merchant-level accounting codes, which are only available for each merchant's own stores and uPay sites (see ["Merchant Accounting Settings" on page 543](#)).

Common accounting codes are typically assigned to tax classes (see ["Tax Account Codes" on page 542](#)). 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 543](#)).

New accounting codes are established by merchant managers for five reasons:

- To serve as the default accounting code used by a store (see ["Configuring Store Settings" on page 545](#)),
- To associate with tax codes (see ["Products, Shipping, and Tax" on page 547](#)),
- To serve as the accounting code used by one or more uPay sites (see ["Configuring uPay Settings" on page 549](#)),

- To serve as an override accounting code used by one or more products in a store (see "**Products, Shipping, and Tax**" on page 547), and
- To serve as an override accounting code assigned to a delivery method in a shipping class (see "**Products, Shipping, and Tax**" on page 547).

Accounting code fields are only available in stores and uPay sites if general ledger reporting has been enabled.

About Colleague Codes

For Colleague by Ellucian general ledger reporting, a Marketplace administrator or merchant manager enters the Colleague Codes that will be used. As each Colleague Code is entered in Marketplace, it is validated with your Colleague by Ellucian system.

Colleague Codes can be associated with stores, products, tax classes, delivery methods, and uPay sites. When transactions take place and general ledger functionality has been turned on, the associated Colleague Codes are passed to the Colleague by Ellucian system.

Note: The Colleague Code that is assigned as a store's accounting code (or a uPay site's accounting code) represents the credit side of double-entry general ledger reporting.

Important! Before you create Marketplace accounting codes, contact your Colleague administrator for a list of the approved Colleague Codes and Colleague Shortcuts.

About Colleague Shortcuts

Whenever this guide mentions Colleague Codes, it also means Colleague Shortcuts. A Colleague Shortcut can represent a group of Colleague Codes with percentages assigned to each Colleague Code in the group so that transactions are split into multiple Colleague Codes according to a prescribed allocation plan. Transactions can be split among multiple Colleague Codes or 100% can be assigned to a single Colleague Code.

Note: Colleague Shortcuts are entered on the NARD screen of the Colleague system.

As each Colleague Code or Colleague Shortcut is entered in Marketplace, it is validated with Colleague by Ellucian. For Colleague Shortcuts, Colleague by Ellucian returns a list of the associated Colleague Codes and the distribution percentages. This information is then stored in Marketplace for all subsequent related transactions.

Note: TouchNet recommends using Colleague Shortcuts whenever possible, rather than using individual Colleague codes. When you use Colleague Shortcuts, the description shows up in the Cash Receipts and GL Posting Reports for Colleague.

About GL Distribution Codes

In addition to Colleague Codes, Marketplace also uses GL Distribution Codes (also known as Payment Distribution Codes). Once a merchant manager (or store manager or uPay site manager) turns on general ledger reporting for Colleague by Ellucian, the store or uPay site must be configured with a GL Distribution Code. When transactions take place, the GL Distribution Code is reported to Colleague by Ellucian.

No validation process takes place when the GL Distribution Code is entered in Marketplace. Merchant managers (or store managers or uPay site managers) are responsible for making sure they enter valid GL Distribution Codes.

Note: Typically, the GL Distribution Code represents the debit account number of double-entry general ledger reporting.

Important! Contact your Colleague by Ellucian general ledger administrator for a list of the approved GL Distributions Codes that can be used with Marketplace. Likewise, contact the Colleague by Ellucian administrator if a new GL Distribution Code is required.

15.2 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 and uPay sites to use. These accounting codes are called "common" accounting codes.

Here are descriptions of how to configure the system administration settings for general ledger functionality.

Common Accounting Codes

In the system administration settings, a Marketplace administrator can enter a Colleague Code as a Marketplace "common accounting code."

The following table describes how to create a common accounting code.

<p>Configuration Setting for Colleague by Ellucian: Adding Common Accounting Codes</p>
<p>Description: Marketplace administrators can set up common accounting codes for use by Marketplace stores.</p>
<p>Left Navigation Menu: Marketplace Home > System Administration > Settings > Accounting Codes.</p>
<p>Page: Displays the Marketplace Accounting Codes page.</p>

Configuration Setting for Colleague by Ellucian: Adding Common Accounting Codes

Description: Marketplace administrators can set up common accounting codes for use by Marketplace stores.

Actions: The Marketplace Accounting Codes page lists all the common accounting codes that have currently been established for use by Marketplace.

Marketplace 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.

Print Page

Add Common Accounting Code

Accounting Codes

Name	In Use	Actions
Miscellaneous revenue	Yes	Edit Delete
State and Local Taxes	Yes	Edit Delete

Show Merchant Accounting Codes

To add a new accounting code, select the Add Common Accounting Code button, which displays the Add New Common Accounting Code page. Enter an approved Colleague Code in the Colleague Code field. (You will need to contact your institution's Colleague by Ellucian administrator for a list of the approved Colleague Codes.) Colleague Codes already entered as "common accounting codes" are displayed in the "Accounting Codes in Use" table.

Add New Common Accounting Code

Accounting code names must be unique (case-insensitive). Listed below are the names already in use.

Back To Stores Common Accounting Codes

Accounting Code Information

Colleague Code:

Add

Accounting Codes In Use

Accounting code names must be unique (case-insensitive).

MISC
TAX

Note: TouchNet recommends using Colleague Shortcuts whenever possible, rather than using individual Colleague Codes. When you use Colleague Shortcuts, the description shows up in the Cash Receipts and GL Posting Reports for Colleague.

Tax Account Codes

In the system administration settings, a Marketplace administrator can also assign accounting codes to tax classes.

The following tables describe those system administration settings which affect tax account codes.

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.

Left Navigation Menu: Marketplace Home > System Administration > Settings > Tax Account Codes.

Page: Displays the Marketplace Tax Account Codes page.

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.

Tax Class Id	Tax Class Name	Accounting Code
0	no tax	<input type="text"/>
1	default tax rate	State and Local Taxes
2	higher tax rate	State and Local Taxes

Save Reset

Accounting codes can also be assigned to tax classes at the merchant level and the store level. If accounting codes have been assigned to tax classes at either the merchant level or the store level, then these accounting codes will override the accounting codes assigned at the administrative level. If no accounting codes are assigned to tax classes at either the merchant level or the store level, then the store reports tax revenue using the accounting codes assigned for taxes at the administrative level.

Note: Stores that use the Marketplace tax service never use the "higher tax rate": The tax service only uses the "no tax" and "default tax rate" tax classes. The higher tax rate is only available with campus-maintained tax rate files. For more about the Marketplace tax service, see **"Taxes" on page 238**.

15.3 Configuring Merchant Settings

Before a store or uPay site can use a common accounting code, the code must first be "enabled" by the 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 an individual merchant's stores and uPay sites.

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.

Left Navigation Menu: Marketplace Home > [merchant] > Accounting Codes.

Page: Displays the [Merchant] Accounting Codes page.

Actions: The [Merchant] Accounting Codes page lists the common accounting codes that are available for use by the merchant.

By selecting accounting codes in the "Available Common Accounting Codes" list box and clicking the Add button, 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.

Alumni 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.								
Available Common Accounting Codes Miscellaneous revenue State and Local Taxes Add Accounting Code	Add >>	Enabled Common Accounting Codes <table border="1"> <thead> <tr> <th>Name</th> <th>In Use</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td colspan="3">None currently enabled.</td> </tr> </tbody> </table>	Name	In Use	Actions	None currently enabled.		
Name	In Use	Actions						
None currently enabled.								
Current Accounting Codes <table border="1"> <thead> <tr> <th>Name</th> <th>In Use</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>Parking Permit Fee</td> <td>Yes</td> <td>Edit Delete</td> </tr> </tbody> </table>			Name	In Use	Actions	Parking Permit Fee	Yes	Edit Delete
Name	In Use	Actions						
Parking Permit Fee	Yes	Edit Delete						

Merchant Accounting Settings

In addition to the common accounting codes established at the system administration level, Marketplace merchants can create accounting codes that will be used only by the merchant's stores and uPay sites.

The following table describes how to add new accounting codes.

Configuration Setting for Colleague by Ellucian: Add New Accounting codes

Description: A Marketplace manager can add new accounting codes to be used by the merchant's stores and uPay sites.

Left Navigation Menu: Marketplace Home > [merchant] > Accounting Codes.

Page: Displays the [Merchant] Accounting Codes page.

Actions: The top portion of the Merchant Accounting Codes page lists the common accounting codes that are available for use by the merchant, while the bottom portion lists all the merchant accounting codes that have currently been established for use by this merchant. To add a merchant accounting code for use by only this merchant's stores and uPay sites, select the Add Accounting Code button. The Add a New Accounting Code page appears.

Enter an approved Colleague Code in the Colleague Code field. Names already used are displayed in the "Current Accounting Code Names in Use" table.

Note: TouchNet recommends using Colleague Shortcuts whenever possible, rather than using individual Colleague Codes. When you use Colleague Shortcuts, the description shows up in the Cash Receipts and GL Posting Reports for Colleague.

Tax Account Codes

In the merchant settings, a Marketplace merchant manager can assign accounting codes to tax classes. These accounting codes will be reported when taxes are assessed on uStores transactions.

The following table describes the merchant settings that affect tax account codes.

Configuration Setting: Establishing Tax Account Codes

Description: Marketplace merchant managers can link accounting codes to tax classes at the merchant level. These tax classes are then available for use by the merchant's stores.

Left Navigation Menu: Marketplace Home > [merchant] > Tax Account Codes.

Page: Displays the [Merchant] Tax Account Codes page.

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.

Tax Class Name	Accounting Code
no tax	<input type="text"/>
default tax rate	<input type="text"/>
higher tax rate	<input type="text"/>

Accounting codes can also be assigned to tax classes at the store level. Accounting codes assigned for taxes at the store level will override the accounting codes assigned for taxes at the merchant level. If no accounting codes are assigned to tax classes at either the merchant level or the store level, then the store reports tax revenue using the accounting codes assigned for taxes at the administrative level.

Note: Stores that use the Marketplace tax service never use the "higher tax rate": The tax service only uses the "no tax" and "default tax rate" tax classes. The higher tax rate is only available with campus-maintained tax rate files. For more about the Marketplace tax service, see **"Taxes" on page 238**.

15.4 Configuring Store Settings

Before general ledger codes are reported with transactions, a merchant manager or store 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 to use 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 or store manager can turn on general ledger functionality and select a default accounting code to be used for transactions at a store.

Left Navigation Menu: Marketplace Home > [Merchant] > Stores > [Store Name] > Store Settings > General.

Page: Displays the [Store Name] General Settings page.

Actions: To turn on general ledger functionality for a store, select Yes for Perform General Ledger Updates.

If you turn on general ledger functionality, you must also enter a GL Distribution Code in the Tender GL Dist Code field. This code will be reported to Colleague by Ellucian for all transactions for this store.

In addition, you must also select an accounting code from the Default Accounting Code 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.

Accounting code is required to complete updates to the General Ledger.	
Perform General Ledger Updates:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Tender GL Dist Code:	<input type="text"/>
Default Accounting Code:	General Alumni <input type="button" value="v"/>

Products, Shipping, and Tax

Several additional general ledger settings can be configured at the store level: accounting code overrides can be assigned to products and delivery methods, and accounting codes can be assigned to store taxes. These configuration settings are discussed in the following tables.

Configuration Setting: Selecting an Accounting Code Override for a Product

Description: A Marketplace store manager can assign an accounting code override to a product.

Left Navigation Menu: Marketplace Home > [Merchant] > Stores > [Store Name] > Store Settings > Products.

Page: Displays the [Store Name] Products page.

Actions: For existing products, click a product name to display the associated [Store Name] Product Settings page. The store's default accounting code will be used unless you have selected an accounting code override for the product. To use an override, select an accounting code from the Override Default Accounting Code dropdown menu.

To override the store default account code, select a value in the Account Code Override drop down.	
Store's Default Accounting Code:	General Alumni
Override Default Accounting Code:	<input type="text" value=""/>

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.

Note: You can also select an accounting code override when you add a new product. Select the Add Product button on the [Store Name] Products page, which starts the Add Product Wizard. Step 2 of the wizard displays the Override Accounting Code dropdown menu. You can also set an accounting code override when importing a product list. For more information, see ["Importing Product Lists" on page 261](#).

Configuration Setting: Selecting an Accounting Code Override for a Delivery Method

Description: A Marketplace store manager can associate an accounting code with a delivery method in a shipping class.

Left Navigation Menu: Marketplace Home > [Merchant] > Stores > [Store Name] > Store Settings > Shipping Classes.

Page: Displays the [Store Name] Shipping Classes page.

Configuration Setting: Selecting an Accounting Code Override for a Delivery Method

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 Classes page. To select an override for a delivery method, select an accounting code from the Accounting Code Override dropdown menu.

Shipping Class: regular

All charges are in USD (\$)

Delivery Method	Enable	Base Charge	Additional Item Charge	Shipping Address Required	Allowed Countries	Tax Class	Accounting Code Override
None	<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>	N/A	default tax rate	
Walk-In	<input checked="" type="checkbox"/>	0.00	0.00	<input type="checkbox"/>	N/A	default tax rate	
USPS First-Class Mail	<input checked="" type="checkbox"/>	0.00	0.00	<input checked="" type="checkbox"/>	Select Countries	default tax rate	
USPS Priority Mail	<input checked="" type="checkbox"/>	0.00	0.00	<input checked="" type="checkbox"/>	Select Countries	default tax rate	
USPS Express Mail	<input checked="" type="checkbox"/>	0.00	0.00	<input checked="" type="checkbox"/>	Select Countries	default tax rate	

Default Delivery Location:

City:

State:

ZIP / Postal Code:

All U.S. States, Territories and Armed Forces must use ZIP-4 (format: XXXXX-XXXX).

[Save regular Shipping Class](#)

Configuration Setting: Selecting an Accounting Code for a Tax Class

Description: Marketplace store managers can link accounting codes to tax classes for individual stores.

Left Navigation Menu: Marketplace Home > [merchant] > Stores > [store] > Tax Account Codes.

Page: Displays the [Store Name] Tax Account Codes page.

Configuration Setting: Selecting an Accounting Code for a Tax Class

Description: Marketplace store managers can link accounting codes to tax classes for individual stores.

Actions: This page lists three tax classes: no tax, default tax rate, and higher tax rate.

Tax Account Codes	
Tax Class Name	Accounting Code
no tax	<input type="text" value=""/>
default tax rate	<input type="text" value=""/>
higher tax rate	<input type="text" value=""/>

Save Reset

You can assign an accounting code to each tax class by choosing from the Accounting Code dropdown menus.

If no accounting codes are assigned to the tax classes, then the store reports tax revenue using the accounting codes configured for taxes at the merchant level.

Note: Stores that use the Marketplace tax service never use the "higher tax rate": The tax service only uses the "no tax" and "default tax rate" tax classes. The higher tax rate is only available with campus-maintained tax rate files. For more about the Marketplace tax service, see ["Taxes" on page 238](#).

15.5 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. In addition, a GL Distribution Code must be entered. The accounting code (Colleague Code) and GL Distribution Code are then reported 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.

Left Navigation Menu: Marketplace Home > [Merchant] > uPay Sites > [uPay Site Name] > Payment Settings.

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.

Page: Displays the [uPay Site] Payment Settings page.

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 enter a GL Distribution Code in the Tender GL Dist Code field. In addition, 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.

Accounting Settings	
Perform General Ledger Updates:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Tender GL Dist Code:	<input type="text"/>
Accounting Code:	<input type="text" value="▼"/>

15.6 Maintaining Accounting Codes

If a Colleague Code changes, you must edit the accounting code in Marketplace. Administrators can edit common accounting codes and merchant managers can edit merchant account codes.

Configuration Setting to Maintain: Common Accounting Codes

Description: Marketplace administrators can edit and delete common accounting codes.

Left Navigation Menu: Marketplace Home > System Administration > Settings > Accounting Codes.

Page: Displays the Marketplace 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 Delete link on the Marketplace Accounting Codes page is only active for accounting codes that are not currently in use.

Marketplace 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.

Accounting Codes

Name	In Use	Actions
Miscellaneous revenue	Yes	Edit Delete
State and Local Taxes	Yes	Edit Delete

You can also select the Show Merchant Accounting Codes button to view a list of all the accounting codes that have been set up for each merchant.

When you select the Edit link in the Actions column, the Edit Common Accounting Code page appears for the corresponding accounting code. To edit a common accounting code, enter an approved Colleague Code in the Colleague Code field. Colleague Codes already used are displayed in the "Current Accounting Code Names in Use" table. When you edit an accounting code, anywhere this accounting code is being used will be updated with the new Colleague Code.

Edit Common Accounting Code

Print Page

Accounting Code Information

Colleague Code:	MISC
-----------------	------

Accounting Codes In Use

Accounting code names must be unique (case-insensitive).

Miscellaneous revenue
State and Local Taxes

Configuration Setting to Maintain: Merchant Accounting Codes
Description: Merchant managers can enable existing common accounting codes and edit merchant-specific accounting codes.
Left Navigation Menu: 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 or uPay site. To remove an enabled common accounting code from this page, select the corresponding Remove link.

To edit a merchant accounting code (for example, to change the Colleague Code), select the corresponding Edit link. The Delete link is only active for accounting codes that are not currently in use.

Alumni 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.

Available Common Accounting Codes

Miscellaneous revenue
State and Local Taxes

[Add >>](#)

[Add Accounting Code](#)

Enabled Common Accounting Codes

Name	In Use	Actions
None currently enabled.		

Current Accounting Codes

Name	In Use	Actions
General Alumni	Yes	Edit Delete
Parking Permit Fee	Yes	Edit Delete

When you select the Edit link to edit an accounting code, the Edit Accounting Code page appears. Enter an approved Colleague code in the Colleague Code field. (You will need to contact your institution's Colleague by Ellucian administrator for a list of the approved Colleague Codes.) Colleague Codes already used are displayed in the "Current Accounting Code Names in Use" table. When you edit an accounting code, anywhere this accounting code is being used will be updated with the new Colleague Code value.

Configuration Setting to Maintain: Merchant Accounting Codes

Description: Merchant managers can enable existing common accounting codes and edit merchant-specific accounting codes.

Edit Accounting Code

Edit accounting code and name

Print Page 

[Back To Alumni Accounting Codes](#)

Colleague Code:

[Add](#)

Current Accounting Code In Use

Accounting codes must be unique, case-insensitive. Listed below are existing codes.

General Alumni
Parking Permit Fee

16.0 Setup for PeopleSoft

If your institution uses PeopleSoft General Ledger software, you can integrate its general ledger functionality with TouchNet Marketplace. When general ledger functionality is enabled in Marketplace, fields become available in the Marketplace Operations Center for entering PeopleSoft SpeedType codes and business unit codes. These PeopleSoft codes can be associated with Marketplace accounting codes, and in turn, Marketplace accounting codes can be associated with stores, uPay sites, products, tax rates, and delivery methods. When transactions take place, PeopleSoft SpeedType Codes and business unit codes are thus communicated to PeopleSoft General Ledger.

Integration of PeopleSoft General Ledger and Marketplace involves the following actions: 1) configuring payment methods in Payment Gateway, 2) editing the Marketplace *critical.prp* file, and 3) configuring Marketplace for using PeopleSoft General Ledger functionality. Only the third action is covered in the Marketplace 6.5 User Guide. The first two actions (as well as the third action) are covered in the following guide: *PeopleSoft Setup Guide for Marketplace*.

Important! PeopleSoft Connect v6.0 for Finance must be installed in order for Marketplace to communicate with PeopleSoft General Ledger. If you have not yet installed PeopleSoft Connect for Finance, you should contact TouchNet Customer Care about downloading the current version of PeopleSoft Connect for Finance.

Steps for PeopleSoft Setup

The following steps summarize how to use the Marketplace Operations Center to establish general ledger integration for PeopleSoft.

- 1 A Marketplace administrator creates common accounting codes. See **"Configuring System Administration Settings" on page 557**.
- 2 A Marketplace administrator assigns a common accounting code to each tax class. See **"Tax Account Codes" on page 558**.
- 3 For each Marketplace merchant, a merchant manager selects which common accounting codes will be used by the merchant. See **"Configuring Merchant Settings" on page 559**.
- 4 For each Marketplace merchant, a merchant manager adds new accounting codes, as necessary. These codes may include 1) store default accounting codes, 2) uPay site accounting codes, 3) override accounting codes to be used by products, 4) override accounting codes for delivery methods, and 5) accounting codes for tax classes. See **"Merchant Accounting Codes" on page 560**.
- 5 For each Marketplace merchant, a merchant manager can assign an accounting code to each tax class. See **"Tax Account Codes" on page 561**.

- 6 For each Marketplace store, a merchant manager or store manager turns on general ledger functionality, selects the default accounting code for the store. See ["Configuring Store Settings" on page 562](#).
- 7 For each Marketplace store, a store manager can assign accounting codes to products, delivery methods, and tax classes. See ["Products, Shipping, and Tax" on page 564](#).
- 8 For each Marketplace uPay site, a merchant manager or uPay site manager turns on general ledger functionality and selects the default accounting code. See ["Configuring uPay Settings" on page 566](#).

16.1 About Accounting Codes

In Marketplace, accounting codes can be established at the system administrative level and the merchant level. Accounting codes established at the system administrative level are available for all merchants, stores, and uPay sites to use. Accounting codes established at the merchant level are available for specific stores and uPay sites. When uStores or uPay transactions take place, information stored with these accounting codes—including PeopleSoft SpeedType Codes and business unit codes—is sent to your People General Ledger system.

Who Creates Accounting Codes?

Marketplace 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 557](#)), and merchant managers create merchant-level accounting codes, which are only available for each merchant's own stores and uPay sites (see ["Merchant Accounting Codes" on page 560](#)).

Common accounting codes are typically assigned to tax classes (see ["Tax Account Codes" on page 558](#)). 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 559](#)).

New accounting codes are established by merchant managers for five reasons:

- To serve as the default accounting code used by a store (see ["Configuring Store Settings" on page 562](#)),
- To associate with tax codes (see ["Products, Shipping, and Tax" on page 564](#)),
- To serve as the accounting code used by one or more uPay sites (see ["Configuring uPay Settings" on page 566](#)),
- To serve as an override accounting code used by one or more products in a store (see ["Products, Shipping, and Tax" on page 564](#)), and

- To serve as an override accounting code assigned to a delivery method in a shipping class (see "**Products, Shipping, and Tax**" on page 564).

Accounting code fields are only available in stores and uPay sites if general ledger reporting has been enabled.

About PeopleSoft Accounting Codes

For PeopleSoft General Ledger reporting, Marketplace accounting codes are tied to SpeedType and business unit codes. When Marketplace stores or uPay sites use general ledger functionality, the associated PeopleSoft codes are passed to the PeopleSoft General Ledger system when transactions take place.

Marketplace accounting codes are created by administrators and merchant managers. Each accounting code is associated with a SpeedType code and a business unit code (and these codes must be approved by your institution's PeopleSoft administrator). As each PeopleSoft code is entered in Marketplace, it is validated with your PeopleSoft General Ledger system.

During the Marketplace uStores fulfillment process, the PeopleSoft codes are passed to your PeopleSoft General Ledger system. Likewise, when uPay transactions are processed, the associated PeopleSoft codes are passed to your PeopleSoft General ledger system.

Important! Before a Marketplace accounting code can be established you must ensure a SpeedType code and a business unit code have been created that can be associated with the accounting code. Contact your PeopleSoft administrator for a list of the approved PeopleSoft codes. Likewise, contact the PeopleSoft administrator if a new PeopleSoft code is required.

16.2 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 and uPay sites to use. These accounting codes are called "common" accounting codes.

Here are descriptions of how to configure the system administration settings for general ledger functionality.

PeopleSoft System Administration Settings

In the system administration settings, a Marketplace administrator can create a common accounting code and associate it with a PeopleSoft SpeedType and business unit.

The following table describes how to create a common accounting code.

Configuration Setting for PeopleSoft: Adding Common Accounting Codes

Description: Marketplace administrators can set up common accounting codes for use by Marketplace stores.

Left Navigation Menu: Marketplace Home > System Administration > Settings > Accounting Codes.

Page: Displays the Marketplace Accounting Codes page.

Actions: The Marketplace Accounting Codes page lists all the common accounting codes that have currently been established for use by Marketplace stores.

Name	In Use	Actions
Miscellaneous revenue	Yes	Edit Delete
State and Local Taxes	Yes	Edit Delete

To add a new accounting code, select the Add Common Accounting Code button, which displays the Add New Common Accounting Code page. Enter an approved PeopleSoft SpeedType in the SpeedType Code field. Enter an approved PeopleSoft business unit in the Business Unit field. (You will need to contact your institution's PeopleSoft administrator for a list of the approved PeopleSoft 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 "Accounting Codes in Use" table.

Name	In Use
Miscellaneous revenue	Yes
State and Local Taxes	Yes

Tax Account Codes

In the system administration settings, a Marketplace administrator can also assign accounting codes to tax classes.

The following tables describe those system administration settings which affect tax account codes.

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.

Left Navigation Menu: Marketplace Home > System Administration > Settings > Tax Account Codes.

Page: Displays the Marketplace Tax Account Codes page.

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.

Tax Class Id	Tax Class Name	Accounting Code
0	no tax	<input type="text"/>
1	default tax rate	State and Local Taxes
2	higher tax rate	State and Local Taxes

Save Reset

Accounting codes can also be assigned to tax classes at the merchant level and the store level. If accounting codes have been assigned to tax classes at either the merchant level or the store level, then these accounting codes will override the accounting codes assigned at the administrative level. If no accounting codes are assigned to tax classes at either the merchant level or the store level, then the store reports tax revenue using the accounting codes assigned for taxes at the administrative level.

Note: Stores that use the Marketplace tax service never use the "higher tax rate": The tax service only uses the "no tax" and "default tax rate" tax classes. The higher tax rate is only available with campus-maintained tax rate files. For more about the Marketplace tax service, see ["Taxes" on page 238](#).

16.3 Configuring Merchant Settings

Before a store or uPay site can use a common accounting code, the code must first be "enabled" by the 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 an individual merchant's stores and uPay sites.

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.

Left Navigation Menu: Marketplace Home > [merchant] > Accounting Codes.

Page: Displays the [Merchant] Accounting Codes page.

Actions: The [Merchant] Accounting Codes page lists the common accounting codes that are available for use by the merchant.

By selecting accounting codes in the "Available Common Accounting Codes" list box and clicking the Add button, 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.

Merchant Accounting Codes

In addition to the common accounting codes established at the system administration level, Marketplace merchants can create accounting codes that will be used only by the merchant's stores and uPay sites.

The following table describes how to add new accounting codes.

Configuration Setting for PeopleSoft: 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 SpeedType and business unit codes.

Left Navigation Menu: Marketplace Home > [merchant] > Accounting Codes.

Page: Displays the [Merchant] Accounting Codes page.

Configuration Setting for PeopleSoft: 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 SpeedType and business unit codes.

Actions: The top portion of the Merchant Accounting Codes page lists the common accounting codes that are available for use by the merchant, while the bottom portion lists all the merchant accounting codes that have currently been established for use by this merchant. To add a merchant accounting code for use by only this merchant's stores and uPay sites, select the Add Accounting Code button. The Add a New Accounting Code page appears.

Add A New Accounting Code

Print Page

[Back To Alumni Accounting Codes](#)

Speedtype Code	<input type="text"/>
Business Unit	<input type="text"/>
New Accounting Code Name:	<input type="text"/>

[Add](#)

Current Accounting Code Names In Use

Accounting code names must be unique, case-insensitive. Listed below are existing names.

General Alumni
Parking Permit Fee

Enter an approved PeopleSoft SpeedType in the SpeedType Code field. Enter an approved PeopleSoft business unit in the Business Unit field. And enter a name for the accounting code (25 characters maximum) in the New Accounting Code Name field. The name you assign must be unique. Names already used are displayed in the "Current Accounting Code Names in Use" table.

Tax Account Codes

In the merchant settings, a Marketplace merchant manager can assign accounting codes to tax classes. These accounting codes will be reported when taxes are assessed on uStores transactions.

The following table describes the merchant settings that affect tax account codes.

Configuration Setting: Establishing Tax Account Codes

Description: Marketplace merchant managers can link accounting codes to tax classes at the merchant level. These tax classes are then available for use by the merchant's stores.

Left Navigation Menu: Marketplace Home > [merchant] > Tax Account Codes.

Page: Displays the [Merchant] Tax Account Codes page.

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.

Tax Class Name	Accounting Code
no tax	<input type="text"/>
default tax rate	<input type="text"/>
higher tax rate	<input type="text"/>

Accounting codes can also be assigned to tax classes at the store level. Accounting codes assigned for taxes at the store level will override the accounting codes assigned for taxes at the merchant level. If no accounting codes are assigned to tax classes at either the merchant level or the store level, then the store reports tax revenue using the accounting codes assigned for taxes at the administrative level.

Note: Stores that use the Marketplace tax service never use the "higher tax rate": The tax service only uses the "no tax" and "default tax rate" tax classes. The higher tax rate is only available with campus-maintained tax rate files. For more about the Marketplace tax service, see **"Taxes" on page 238**.

16.4 Configuring Store Settings

Before general ledger codes are reported with transactions, a merchant manager or store manager must turn on the Perform General Ledger Updates option. This option is located in the store settings. In addition, a merchant manager or store manager can select the default accounting code to use with a store.

A store manager can select an accounting code override to use 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 and the accounting codes to use with taxes.

Configuration Setting: Turning On General Ledger Functionality

Description: A Marketplace merchant manager or store manager can turn on general ledger functionality and select a default accounting code to be used for transactions at a store.

Left Navigation Menu: Marketplace Home > [Merchant] > Stores > [Store Name] > Store Settings > General.

Page: Displays the [Store Name] General Settings page.

Actions: To turn on general ledger functionality for a store, select Yes for Perform General Ledger Updates.

If you turn on general ledger functionality, you must also select an accounting code from the Default Accounting Code 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.

Accounting code is required to complete updates to the General Ledger.	
Perform General Ledger Updates:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Default Accounting Code:	General Alumni <input type="button" value="v"/>

Products, Shipping, and Tax

Several additional general ledger settings can be configured at the store level: accounting code overrides can be assigned to products and delivery methods, and accounting codes can be assigned to store taxes. These configuration settings are discussed in the following tables.

Configuration Setting: Selecting an Accounting Code Override for a Product

Description: A Marketplace store manager can assign an accounting code override to a product.

Left Navigation Menu: Marketplace Home > [Merchant] > Stores > [Store Name] > Store Settings > Products.

Page: Displays the [Store Name] Products page.

Actions: For existing products, click a product name to display the associated [Store Name] Product Settings page. The store's default accounting code will be used unless you have selected an accounting code override for the product. To use an override, select an accounting code from the Override Default Accounting Code dropdown menu.

To override the store default account code, select a value in the Account Code Override drop down.	
Store's Default Accounting Code:	General Alumni
Override Default Accounting Code:	<input type="text" value=""/>

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.

Note: You can also select an accounting code override when you add a new product. Select the Add Product button on the [Store Name] Products page, which starts the Add a New Product Wizard. Step 2 of the wizard displays the Override Accounting Code dropdown menu. You can also set an accounting code override when importing a product list. For more information, see ["Importing Product Lists" on page 261](#).

Configuration Setting: Selecting an Accounting Code Override for a Delivery Method

Description: A Marketplace store manager can associate an accounting code with a delivery method in a shipping class.

Left Navigation Menu: Marketplace Home > [Merchant] > Stores > [Store Name] > Store Settings > Shipping Classes.

Page: Displays the [Store Name] Shipping Classes page.

Configuration Setting: Selecting an Accounting Code Override for a Delivery Method

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 Classes page. To select an override for a delivery method, select an accounting code from the Accounting Code Override dropdown menu.

Shipping Class: regular

All charges are in USD (\$)

Delivery Method	Enable	Base Charge	Additional Item Charge	Shipping Address Required	Allowed Countries	Tax Class	Accounting Code Override
None	<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>	N/A	default tax rate	
Walk-In	<input checked="" type="checkbox"/>	0.00	0.00	<input type="checkbox"/>	N/A	default tax rate	
USPS First-Class Mail	<input checked="" type="checkbox"/>	0.00	0.00	<input checked="" type="checkbox"/>	Select Countries	default tax rate	
USPS Priority Mail	<input checked="" type="checkbox"/>	0.00	0.00	<input checked="" type="checkbox"/>	Select Countries	default tax rate	
USPS Express Mail	<input checked="" type="checkbox"/>	0.00	0.00	<input checked="" type="checkbox"/>	Select Countries	default tax rate	

Default Delivery Location:

City:

State:

ZIP / Postal Code:

All U.S. States, Territories and Armed Forces must use ZIP-4 (format: XXXXX-XXXX).

[Save regular Shipping Class](#)

Configuration Setting: Selecting an Accounting Code for a Tax Class

Description: Marketplace store managers can link accounting codes to tax classes for individual stores.

Left Navigation Menu: Marketplace Home > [merchant] > Stores > [store] > Tax Account Codes.

Page: Displays the [Store Name] Tax Account Codes page.

Configuration Setting: Selecting an Accounting Code for a Tax Class

Description: Marketplace store managers can link accounting codes to tax classes for individual stores.

Actions: This page lists three tax classes: no tax, default tax rate, and higher tax rate.

Tax Account Codes	
Tax Class Name	Accounting Code
no tax	<input type="text"/>
default tax rate	<input type="text"/>
higher tax rate	<input type="text"/>

You can assign an accounting code to each tax class by choosing from the Accounting Code dropdown menus.

If no accounting codes are assigned to the tax classes, then the store reports tax revenue using the accounting codes configured for taxes at the merchant level.

Note: Stores that use the Marketplace tax service never use the "higher tax rate": The tax service only uses the "no tax" and "default tax rate" tax classes. The higher tax rate is only available with campus-maintained tax rate files. For more about the Marketplace tax service, see ["Taxes" on page 238](#).

16.5 Configuring uPay Settings

In order for general ledger codes to be reported to PeopleSoft for uPay transactions, a merchant manager or uPay site 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. The accounting code is then reported with each uPay site transaction that takes place.

Configuration Setting: Selecting a uPay Site Accounting Code

Description: A Marketplace merchant manager or uPay site manager can turn on general ledger functionality and select an accounting code to be used for all transactions at a uPay site.

Left Navigation Menu: 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 or uPay site 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.

The screenshot shows a configuration interface with two main sections: 'Accounting Settings' and 'Payment Settings'. In the 'Accounting Settings' section, there is a label 'Perform General Ledger Updates:' followed by two radio buttons: 'Yes' and 'No'. The 'No' radio button is selected. Below this is a label 'Accounting Codes:' followed by a dropdown menu. The dropdown menu is open, showing two options: 'General Alumni' and 'Parking Permit Fee'. The 'Payment Settings' section is partially visible below.

16.6 Maintaining Accounting Codes

If a PeopleSoft code changes that you use with a Marketplace accounting code, you must edit the accounting code so that it uses the new SpeedType or business unit value.

Configuration Setting to Maintain: Common Accounting Codes

Description: Marketplace administrators can edit and delete common accounting codes.

Left Navigation Menu: Marketplace Home > System Administration > Settings > Accounting Codes.

Page: Displays the Marketplace 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 Delete link on the Marketplace Accounting Codes page is only active for accounting codes that are not currently in use.

Marketplace 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

Accounting Codes

Name	In Use	Actions
Miscellaneous revenue	Yes	Edit Delete
State and Local Taxes	Yes	Edit Delete

Show Merchant Accounting Codes

You can also select the Show Merchant Accounting Codes button to view a list of all the accounting codes that have been set up for each merchant.

When you select the Edit link in the Actions column, the Edit Common Accounting Code page appears for the corresponding accounting code. To edit a common accounting code, enter an approved PeopleSoft SpeedType in the SpeedType Code field, or enter an approved business unit in the Business Unit field. You can also edit the name for the accounting code (25 characters maximum). The name you assign must be unique. Names already used are displayed in the "Current Accounting Code Names in Use" table. When you edit an accounting code, anywhere this accounting code is being used will be updated with the new information (including the updated SpeedType value and the updated business unit value).

Edit Common Accounting Code

Print Page

Back To Stores Common Accounting Codes

Accounting Code Information

Speedtype Code	<input style="width: 90%;" type="text"/>
Business Unit	<input style="width: 90%;" type="text"/>
Accounting Code Name:	<input style="width: 90%;" type="text"/>

Add

Accounting Codes In Use

Accounting code names must be unique (case-insensitive).

Miscellaneous revenue
State and Local Taxes

Configuration Setting to Maintain: Merchant Accounting Codes

Description: Merchant managers can enable existing common accounting codes and edit merchant-specific accounting codes.

Left Navigation Menu: 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 or uPay site. 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.

When you select the Edit link to edit an accounting code, the Edit Accounting Code page appears. Enter an approved SpeedType in the SpeedType Code field , and enter an approved business unit in the Business Unit field. (You will need to contact your institution’s PeopleSoft administrator for a list of the approved PeopleSoft codes.) Enter a name for this code in the Accounting Code Name field (25 characters maximum). The name you assign must be unique. Names already used are displayed in the "Current Accounting Code Names in Use" table. When you edit an accounting code, anywhere this accounting code is being used will be updated with the new information (including the PeopleSoft codes and the updated accounting code name).

Configuration Setting to Maintain: Merchant Accounting Codes

Description: Merchant managers can enable existing common accounting codes and edit merchant-specific accounting codes.

Edit Accounting Code

Edit accounting code and name

Print Page 

[Back To Alumni Accounting Codes](#)

Speedtype Code	<input type="text"/>
Business Unit	<input type="text"/>
Accounting Code Name:	<input type="text"/>

[Add](#)

Current Accounting Code Names In Use

Accounting code names must be unique, case-insensitive. Listed below are existing names.

General Alumni
Parking Permit Fee

17.0 Marketplace Exceptions

This section of the *Marketplace User's Guide* discusses two types of Marketplace exceptions: general ledger exceptions and posting exceptions.

Both types of exceptions require actions be taken.

17.1 General Ledger Exceptions

After uStores orders are fulfilled and uPay payments are processed, Marketplace transfers transaction data to the general ledger system (via TouchNet Connect software). General ledger exceptions occur when data (such as an accounting code) is incorrect or missing, or when data failed to transfer. When this happens, the fulfiller may see an exception message. Subsequently, the store manager (or merchant manager or uPay site manager) may see the Fix General Exceptions task on the U.Commerce Central Dashboard.

Important! A general ledger exception does not mean a fulfillment has failed. It means data could not be transferred to the general ledger system after the transaction was 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.

Viewing General Ledger Exceptions

General Ledger Exceptions can be viewed in the following locations in the Marketplace Operations Center:

- For each store, general ledger exceptions can be viewed by making these choices in the left navigation menu: Marketplace Home > [merchant name] > Stores > [store name] > GL Exceptions.
- For each uPay site, general ledger exceptions can be viewed by making these choices in the left navigation menu: Marketplace Home > [merchant name] > uPay Sites > [uPay site name] > GL Exceptions.
- Users can view all general ledger exceptions for the stores and uPay sites that they have been granted the store manager role, the uPay site manager role, and merchant manager role by making these choices in the left navigation menu: Marketplace Home > Marketplace Exceptions > GL Exceptions.

Note: The number in parenthesis following "GL Exceptions" in the left navigation menu (for stores and uPay sites) indicates the number of orders with GL exceptions.

Here are examples of GL Exception pages :

Marketplace GL Exception			
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.			
Show 10 entries			Print Page
Search: <input type="text"/>			
Order Id	Fulfillment Date	Message(s)	Action
109	10/25/2011 01:58:35 PM CDT	Being Processed	View
143	08/28/2012 04:43:24 PM CDT	Missing /TOUCHNET/GL_FULFILLMENT/FULFILLMENT/SHIPMENT_TAX /TAX/DEBIT_ACCOUNT/ACCOUNT_INFO/DETAIL_CODE	View
241	09/10/2012 07:28:40 AM CDT	Missing /TOUCHNET/GL_FULFILLMENT/FULFILLMENT/SHIPMENT_TAX /TAX/DEBIT_ACCOUNT/ACCOUNT_INFO/DETAIL_CODE	View
244	09/10/2012 07:28:43 AM CDT	Missing /TOUCHNET/GL_FULFILLMENT/FULFILLMENT/SHIPMENT_TAX /TAX/DEBIT_ACCOUNT/ACCOUNT_INFO/DETAIL_CODE	View
259	09/10/2012 07:28:45 AM CDT	Missing /TOUCHNET/GL_FULFILLMENT/FULFILLMENT/SHIPMENT_TAX /TAX/DEBIT_ACCOUNT/ACCOUNT_INFO/DETAIL_CODE	View
273	03/12/2012 07:37:32 AM CDT	Being Processed Missing /TOUCHNET/GL_FULFILLMENT/FULFILLMENT/SHIPMENT_TAX /TAX/DEBIT_ACCOUNT/ACCOUNT_INFO/DETAIL_CODE	View
274	09/10/2012 07:28:50 AM CDT	Being Processed Missing /TOUCHNET/GL_FULFILLMENT/FULFILLMENT/SHIPMENT_TAX /TAX/DEBIT_ACCOUNT/ACCOUNT_INFO/DETAIL_CODE	View
283	03/12/2012 08:48:13 AM CDT	Being Processed Missing /TOUCHNET/GL_FULFILLMENT/FULFILLMENT/SHIPMENT_TAX /TAX/DEBIT_ACCOUNT/ACCOUNT_INFO/DETAIL_CODE	View
285	03/12/2012 11:00:07 AM CDT	Being Processed	View
286	03/13/2012 12:21:15 PM CDT	Being Processed	View

Showing 1 to 10 of 30 entries First Previous 1 2 3 Next Last

The Marketplace GL Exception page for a store.

Marketplace UPay GL Exception			
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.			
Show 10 entries			Search: <input type="text"/>
Order Id	Fulfillment Date	Message(s)	Action
49	04/21/2011 12:00:46 AM CDT	Amount has not been submitted to host system	View
50	04/18/2011 08:24:57 AM CDT	Amount has not been submitted to host system	View
53	07/05/2011 01:31:04 PM CDT	Being Processed Missing /TOUCHNET/GL_FULFILLMENT/FULFILLMENT/FULFILLED_ITEM/PRICE /CREDIT_ACCOUNT/ACCOUNT_INFO/ACCOUN	View
54	05/03/2011 09:09:18 AM CDT	Missing /TOUCHNET/GL_FULFILLMENT/FULFILLMENT/FULFILLED_ITEM/PRICE /CREDIT_ACCOUNT/ACCOUNT_INFO/ACCOUN	View
55	05/03/2011 09:28:32 AM CDT	Missing /TOUCHNET/GL_FULFILLMENT/FULFILLMENT/FULFILLED_ITEM/PRICE /CREDIT_ACCOUNT/ACCOUNT_INFO/ACCOUN	View
56	05/03/2011 09:31:13 AM CDT	Being Processed Missing /TOUCHNET/GL_FULFILLMENT/FULFILLMENT/FULFILLED_ITEM/PRICE /CREDIT_ACCOUNT/ACCOUNT_INFO/ACCOUN	View
88	09/15/2011 12:02:43 PM CDT	Being Processed	View
89	09/15/2011 02:17:09 PM CDT	Being Processed	View
110	11/03/2011 09:29:06 AM CDT	Re-submit - Transmgr communication error (-23) prevented processing	View
444	08/28/2012 03:17:16 PM CDT	Missing /TOUCHNET/GL_FULFILLMENT/FULFILLMENT/FULFILLED_ITEM/PRICE /CREDIT_ACCOUNT/ACCOUNT_INFO/ACCOUN	View

Showing 1 to 10 of 19 entries First Previous 1 2 Next Last

The Marketplace GL Exception page for a uPay site.

Marketplace GL Exception							
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.							
Show 10 entries						Search: <input type="text"/>	
Order Id	Fulfillment Date	Type	Id	Site Name	Partner Name	Message(s)	Action
883	01/07/2014 04:18:19 PM CST	uStores	1	Store 1		Being Processed	View
884	01/07/2014 04:18:21 PM CST	uStores	1	Store 1		Being Processed	View
887	01/08/2014 10:47:02 AM CST	uStores	1	Store 1		Being Processed	View
888	01/10/2014 01:13:17 PM CST	uStores	1	Store 1		Being Processed	View
890	01/10/2014 03:41:06 PM CST	uStores	1	Store 1		Being Processed	View
1161	06/03/2014 02:35:57 PM CDT	uStores	2	Billable Item Store		Being Processed	View
1469	08/26/2014 02:40:32 PM CDT	uPay	0	Upay Site 0	StarREZ	Error - Credit detail code is invalid: XTAF	View
1500	09/09/2014 04:00:19 PM CDT	uPay	0	Upay Site 0	StarREZ	Missing /TOUCHNET/GL_FULFILLMENT/FULFILLMENT/FULFILLED_ITEM/PRICE /CREDIT_ACCOUNT/ACCOUNT_INFO/ACCOUN	View

Showing 71 to 78 of 78 entries First Previous 4 5 6 7 8 Next Last

The Marketplace GL Exception page for all stores and uPay sites for the user.

The Message(s) column on the GL Exceptions page indicates why the general ledger exception occurred. In general, these messages fall into three groups:

- exceptions caused by missing data,
- exceptions caused by invalid data, and
- exceptions caused by problems during data transmission.

To view details on any transaction, select the View link in the Action column on any of the GL Exception pages. The details for the selected GL exception then appear.

Marketplace GL Exception

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.

Back To GL Exceptions
Print Page

Order Info	
Order #:	49
Order Date:	04/14/2011 04:11:37 PM CDT
Buyer Info	
Name:	Test User
Email Address:	test_user@touchnet.com
Payment Info:	
Type:	Credit Card
Method:	Visa
Cashier Id:	
<input type="text" value="CASHIER"/>	
Host Payment Method Id:	
<input type="text" value="CASH"/>	

Shipment Id: 49

Item	Original Amount	Old Accounting Code	New Accounting Code
Upay Site 0	\$37.05	LAB1	<input type="text" value=""/>

Purchase Fulfillment (4/14/11 4:12 AM)			
Amount	Message	Re-Submit	Mark Completed
\$12.35	(-) Amount has not been submitted to host system	<input type="radio"/>	<input type="radio"/>

Purchase Fulfillment (4/21/11 12:00 PM)			
Amount	Message	Re-Submit	Mark Completed
\$12.35	(-) Amount has not been submitted to host system	<input type="radio"/>	<input type="radio"/>

The details for a GL exception.

The GL Exception details page includes information such as the Cashier ID (Banner by Ellucian only), the Host Payment Method ID, and the Accounting Code. These three fields can be updated. Once these fields are updated, the transactions can be re-submitted to the general ledger system.

For more information about general ledger exception messages and how to respond to these messages, see ["Fixing Exceptions Caused By Missing Data" on page 576](#), ["Fixing Exceptions Caused By Invalid Data" on page 578](#), and ["Fixing Exceptions Caused by Communication Issues" on page 579](#)

Fixing Exceptions Caused By Missing Data

When you view the GL Exception page (as described in ["Viewing General Ledger Exceptions" on page 573](#)), you may see transactions that did not successfully update the general ledger system. For each such transaction, a message is included that describes why the GL exception occurred.

If the message indicates data was missing (for example, with Banner by Ellucian, messages in this situation will be prefixed with the word "Missing"), then the required data must be entered before the transaction can be resent to the general ledger system. Messages in this situation describe which piece of general ledger information was missing.

The following table describes the types of information that may be missing.

Exceptions Caused by Missing Data

Missing Information	Description
Cashier ID (Banner by Ellucian only)	This value is required by Banner by Ellucian. You must determine the correct value, enter that value in the Cashier ID field of the GL Exception detail page, and then resend the transaction data.
Host Payment Method ID	The Missing message will appear if Payment Gateway has not been configured with a valid host payment method ID for the linked payment method used with the host system. You must determine the correct host payment method ID, enter this value in the Host Payment Method ID field of the GL Exception detail page, and then resend the transaction data.
Accounting Code	The Missing message will appear if Marketplace has not been configured with a valid accounting code for the product (or for the default store accounting code). You must determine the correct accounting code, see that the corresponding accounting code has been configured for use, choose that value from the New Accounting Code field on the GL Exception detail page, and then resend the transaction data.

To correct the missing data and send the data to the general ledger system, follow these instructions:

- 1 On the GL Exception page, select the View link in the Action column for the transaction with the missing data. The details page then appears.
- 2 Enter the missing data as indicated by the table above.
- 3 Select the Re-Submit radio button.

Note: If the data cannot be corrected, select the Mark Completed radio button. In this situation, data for the marked transaction will not be posted to the general ledger system; however, it will be removed from the GL Exception page. Before you choose this option, be sure you have contacted your general ledger system administrator and determined if this action is appropriate for the transaction.

- 4 Click the Send button.

Fixing Exceptions Caused By Invalid Data

When you view the GL Exception page (as described in "[Viewing General Ledger Exceptions](#)" on page 573), you may see transactions that did not successfully update the general ledger system. For each such transaction, a message is included that describes why the GL exception occurred.

If the message indicates the data was invalid (for example, with Banner by Ellucian, the message will start with the word "Error"), then the required data did not meet the expected values. Invalid data messages typically describe which piece of general ledger data was invalid.

The following table describes the types of information that may be invalid.

Exceptions Caused by Invalid Data

Invalid Information	Description
Host Payment Method ID	A message regarding invalid data may appear if Payment Gateway was configured with an invalid host payment method ID for the linked payment method used with the host system. You must determine the correct host payment method ID, enter this value in the Host Payment Method ID field of the GL Exception details page, and then resend the transaction data.
Accounting Code	A message regarding invalid data may appear if an accounting code was used that is invalid. You must determine the correct accounting code, see that the corresponding accounting code has been configured for use, choose this value from the New Accounting Code field on the GL Exception detail page, and then resend the transaction data.

To correct the invalid data and send the corrected data to the general ledger system, follow these instructions:

- 1 On the GL Exception page, select the View link in the Action column for the transaction with the invalid data. The details page then appears.
- 2 Enter updated data as indicated by the table above.
- 3 Select the Re-Submit radio button.

Note: If the data cannot be corrected, select the Mark Completed radio button. In this situation, data for the marked transaction will not be posted to the general ledger system; however, it will be removed from the GL Exception page. Before you choose this option, be sure you have contacted your general ledger system administrator and determined if this action is appropriate for the transaction.

- 4 Click the Send button.

Fixing Exceptions Caused by Communication Issues

General ledger data is sent by Marketplace to the TouchNet Connect software (Banner Connect, PeopleSoft Connect, Colleague Connect, or Lockbox). This software holds the data and subsequently forwards the data to the general ledger system. If Marketplace encounters a problem when contacting the TouchNet Connect software, a GL exception will result. These GL exceptions will appear on the Marketplace GL Exception page with "Being Processed" in the Message(s) column.

In this situation, you must investigate whether the data was received by the general ledger system. In most situations, the data was not received and you can safely resubmit the general ledger data. But we recommend you contact your general ledger administrator before you take this action.

To work with GL exceptions that show "Being Processed" in the Message(s) column of the GL Exception page, follow these instructions:

- 1 On the GL Exception page, select the View link in the Action column for the transaction with the missing data. The details page then appears.
- 2 Select the Re-Submit radio button.

Note: If the data was in fact received by the general ledger system, select the Mark Completed radio button. The data will not be resubmitted. The transaction will be removed from the GL Exception page.

- 3 Click the Send button.

17.2 Posting Exceptions

For uPay sites that have been configured with a posting URL, Marketplace will send posting parameters after the payment is processed. Posting exceptions occur when Marketplace receives an error when contacting the posting URL, or when the campus web application does not respond. When this happens, an exception message will appear on the Marketplace Posting Exceptions page.

Important! A posting exception does not mean a uPay payment failed. It means data (posting parameters) could not be transferred to the campus web application (via the posting URL) after the transaction was processed.

Viewing Posting Exceptions

Posting Exceptions for uPay sites can be viewed in the following locations in the Marketplace Operations Center:

- For each uPay site, posting exceptions can be viewed by making these choices in the left navigation menu: Marketplace Home > [merchant name] > uPay Sites > [uPay site name] > Posting Exceptions.
- Users can view all posting exceptions for the uPay sites that they have been granted the uPay site manager role or the merchant manager role by making these choices in the left navigation menu: Marketplace Home > Marketplace Exceptions > Posting Exceptions.

Here is an example of the Posting Exceptions page :

Date / Time	External Trans Id	System Tracking ID	Payment Status	Posting Url	Posting Status	Action
03/07/2014 04:55:40 AM CST			Cancel	http://rstillwagon:8080/upay60/rs_posting_test1.jsp	Unknown	Re-Post Mark Completed
03/07/2014 05:10:39 AM CST			Cancel	http://rstillwagon:8080/upay60/rs_posting_test1.jsp	Unknown	Re-Post Mark Completed
03/12/2014 11:00:57 PM CDT		688	Success	http://rstillwagon:8080/upay60/rs_posting_test1.jsp	Unknown	Re-Post Mark Completed
03/12/2014 11:02:04 PM CDT		692	Success	http://rstillwagon:8080/upay60/rs_posting_test1.jsp	Unknown	Re-Post Mark Completed
03/12/2014 11:02:05 PM CDT		693	Success	http://rstillwagon:8080/upay60/rs_posting_test1.jsp	Unknown	Re-Post Mark Completed
03/17/2014 10:29:29 AM CDT			Cancel	http://rstillwagon:8080/upay60/rs_posting_test1.jsp	Unknown	Re-Post Mark Completed
03/19/2014 08:10:44 AM CDT			Cancel	http://rstillwagon:8080/upay60/rs_posting_test1.jsp	Unknown	Re-Post Mark Completed
03/19/2014 08:11:34 AM CDT			Cancel	http://rstillwagon:8080/upay60/rs_posting_test1.jsp	Unknown	Re-Post Mark Completed
03/19/2014 10:41:48 AM CDT			Cancel	http://rstillwagon:8080/upay60/rs_posting_test1.jsp	Unknown	Re-Post Mark Completed
03/19/2014 11:00:46 PM CDT		688	Success	http://rstillwagon:8080/upay60/rs_posting_test1.jsp	Unknown	Re-Post Mark Completed

The Marketplace Posting Exceptions page for a single uPay site.

Marketplace Posting Exceptions								Print Page
Date / Time	Site Name	Partner Name	External Trans Id	System Tracking ID	Payment Status	Posting Url	Posting Status	Action(s)
10/25/2011 11:56:35 AM CDT	Upay Site 3	ZAP Solutions		105	Success	http://zapsolutions.com:8080/upay/web/posting_test.jsp	Error	Re-Post Mark Completed
10/25/2011 12:00:04 PM CDT	Upay Site 1	Ungerboeck Software		106	Success	http://ungerboeck.com:8080/upay/web/posting_test.jsp	Error	Re-Post Mark Completed
10/25/2011 12:47:11 PM CDT	Upay Site 2	Timber Press	A234	107	Success	http://timberpress.com:8080/upay/web/posting_test.jsp	Error	Re-Post Mark Completed
12/03/2011 12:00:45 AM CST	Upay Site 7	Songwhale		53	Success	http://songwhale.com:8080/upay/web/posting_test.jsp	Error	Re-Post Mark Completed
12/03/2011 12:00:46 AM CST	Upay Site 3	ZAP Solutions		56	Success	http://zapsolutions.com:8080/upay/web/posting_test.jsp	Error	Re-Post Mark Completed
12/21/2011 02:28:51 PM CST	Upay Site 7	Songwhale			Cancel	http://songwhale.com:8080/upay60/rs_posting_test.jsp	Error	Re-Post Mark Completed
12/28/2011 01:32:05 PM CST	Upay Site 2	Timber Press			Cancel	http://timberpress.com:8080/upay60/rs_posting_test.jsp	Error	Re-Post Mark Completed
01/03/2012 12:00:47 AM CST	Upay Site 7	Songwhale		53	Success	http://songwhale.com:8080/upay/web/posting_test.jsp	Error	Re-Post Mark Completed
01/03/2012 12:00:49 AM CST	Upay Site 2	Timber Press		56	Success	http://timberpress.com:8080/upay/web/posting_test.jsp	Error	Re-Post Mark Completed
01/13/2012 04:03:42 PM CST	Upay Site 0	PaperCut	A234	185	Success	http://papercut.com:8080/upay60/rs_posting_test.jsp	Error	Re-Post Mark Completed

Showing 1 to 10 of 916 entries

The Marketplace Posting Exceptions page for all uPay sites for the user.

All transactions that appear on Posting Exceptions page failed to post to the posting URL. The reason for the failure is indicated in the Posting Status column.

For more information about the values in the Posting Status, see **"Fixing Posting Exceptions" on page 581**

Fixing Posting Exceptions

The following table describes the possible values that you may see in the Posting Status column of the Posting Exceptions page. This table also describes the actions that you must take.

Types of Posting Exceptions

Posting Status	Description
Error	<p>If "Error" appears in the Posting Status column, Marketplace received an error message when it contacted the posting URL. This error will occur if the uPay site was not configured with the posting URL (or if the posting URL has changed and the uPay site configuration was not updated).</p> <p>This posting status may also appear if the posting URL was not available (in which case, Marketplace received a Not Found response).</p> <p>When you see Error in the Posting Status column, you should check the uPay Miscellaneous Settings page and find the value in the Posting URL field. Then contact the administrator for the campus web application and determine if the configured posting URL for the uPay site is valid.</p> <p>If the posting URL value in the uPay settings is valid, you can re-post the transaction information by selecting the Re-Post link in the Action(s) column of the Posting Exceptions page.</p> <p>If the posting URL value in the uPay site configuration settings is not valid, you cannot re-post the transaction data. You can only select "Mark Completed" in order to remove the transaction from the Posting Exceptions page. You should contact the administrator of the general ledger system and provide information about the transaction so that the general ledger system can be adjusted accordingly.</p>
Unknown	<p>If "Unknown" appears in the Posting Status column, Marketplace did not receive a response from the campus web application. (Marketplace will wait for the time period configured on the uPay Miscellaneous Settings page. See the "Mark post as failed after number of seconds" field.)</p> <p>In this situation, you must investigate whether the data was received by the posting URL. In most situations, the data was not received and you can safely resubmit the data. But we recommend you contact the administrator of the campus web application before you take this action.</p> <p>You can attempt to re-post the transaction information by selecting the Re-Post link in the Action(s) column of the Posting Exceptions page.</p>

Note: If the issue with the posting exception cannot be corrected, you can select the Mark Completed link to remove the transaction from the Posting Exceptions page. Before you choose this option, be sure you have contacted your administrator of the campus web application and determined if this action is appropriate for the transaction.

Part 7:
Marketplace
Reports

18.0 Marketplace Reports

Marketplace provides you with a large selection of reports. These reports represent the overall activity for the uStores mall, as well as the activity for individual merchants, stores, and uPay sites.

You can specify the date range that will be represented by each report. You can export each report in CSV format. With the use of external database software (such as Microsoft Excel), you can open and edit exported CSV report files.

18.1 Using Marketplace Reports

To use Marketplace reports, click the Marketplace Reports link in the left navigation 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 Taxes
Merchants	Merchant Revenue Report Taxes
Stores	[Store Revenue Report] By Product [Store Revenue Report] By Stock No. [Store Revenue Report] By Product Type [Store Revenue Report] Totals Taxes Buyer Information Recurring Payments GL Exceptions

Report Submenu	Available Reports
uPay Sites	Revenue By Product Recurring Payments Posting Status GL Exceptions

18.2 Report Types by User Role

The available reports depend on your user roles.

If you have this Role...	You see these Reports
Administrator, chief administrator, or accountant	Revenue by Merchant (the top-level Marketplace report) Revenue by Accounting Code Tax Report
Merchant manager	Merchant Revenue Report All store reports All uPay site reports
Store manager and uStores store accountant	[Store Revenue Report] By Product [Store Revenue Report] By Stock No. [Store Revenue Report] By Product Type [Store Revenue Report] Totals Taxes Buyer Information Recurring Payments GL Exceptions
uPay site manager and uPay site accountant	Revenue By Product Recurring Payments Posting Status GL Exceptions

18.3 Administrative Reports

Several reports are available that summarize Marketplace commerce activity for administrative users and accountants.

You can customize each 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/yy 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.

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.

Revenue by Merchant Report							
The default report shows current day information using the default of "Stores, Mobile and uPay". The report is a summary of the total revenue for the Stores, Mobile and uPay sites.							
Export To CSV							
From:	12/1/12	To:	1/23/13	Stores, Mobile and uPay	View		
Merchant Name	Number of uPay Transactions	uPay Transaction Totals	Number of Items Sold	Store Sales Totals	Shipping Totals	Tax Collected	Total Merchant Revenue
+ Student Union	0	\$0.00	3	\$60.00	\$15.00	\$15.00	\$90.00
+ Alumni	10	\$185.00	2	\$88.00	\$0.00	\$0.00	\$273.00
+ Athletics	0	\$0.00	0	\$0.00	\$0.00	\$0.00	\$0.00
+ Parking Passes	0	\$0.00	0	\$0.00	\$0.00	\$0.00	\$0.00
+ English Department	0	\$0.00	0	\$0.00	\$0.00	\$0.00	\$0.00
+ Music Department	0	\$0.00	0	\$0.00	\$0.00	\$0.00	\$0.00
Total:	10	\$185.00	5	\$148.00	\$15.00	\$15.00	\$363.00

And here is the same report with one of the merchants expanded to show store and uPay site transaction details.

Merchant Name	Number of uPay Transactions	uPay Transaction Totals	Number of Items Sold	Store Sales Totals	Shipping Totals	Tax Collected	Total Merchant Revenue				
+ Student Union	0	\$0.00	3	\$60.00	\$15.00	\$15.00	\$90.00				
- Alumni	10	\$185.00	2	\$88.00	\$0.00	\$0.00	\$273.00				
Stores Revenue											
Store ID	Store Name	Number of Fulfillments	Number of Items Sold	Total Items Amount	Total Shipping Amount	Total Item + Shipping Amount	Total Tax Collected	Total Amount with Tax			
3	Alumni Donations	2	2	\$88.00	\$0.00	\$88.00	\$0.00	\$88.00			
15	Alumni Foundation	0	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			
2	Alumni Shop	0	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			
Total:		2	2	\$88.00	\$0.00	\$88.00	\$0.00	\$88.00			
uPay Revenue											
Site ID	Site Name	Credit Card Transactions	Total Credit Card Transactions	Credit Card via PayPath® Transactions	Total Credit Card via PayPath® Transactions	Campus Card Transactions	Total Campus Card Transactions	ACH Transactions	Total ACH Transactions	Total Transactions	Total Revenue
0	Donations	4	\$125.00	0	\$0.00	0	\$0.00	6	\$60.00	10	\$185.00
1	Donations Too	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00
Total:		4	\$125.00	0	\$0.00	0	\$0.00	6	\$60.00	10	\$185.00

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.

Accounting Code Report			
The default report shows current day information.			
Export To CSV			
From:	1/21/13	To:	1/28/13 View
Accounting Code	Debit/Credit	Total	
MISC	Credit	\$610.00	View Detail
STAX	Credit	\$239.74	View Detail

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.

Accounting Code Detail Report			
Back To Accounting Code Report			
Export To CSV			
From:	1/21/13	To:	1/28/13 View
Accounting Code	Debit/Credit	Amount	
MISC	Credit	\$500.00	
MISC	Credit	\$110.00	

Administrative Tax Report

Administrators, chief administrators, and accountants can open the Administrative Tax Report.

This report shows a summary of activity by accounting code for all stores and uPay sites in your Marketplace system. The report can be displayed with or without the Accounting Code column.

Tax Report							
The default report shows current day information.							
Export To CSV							
From:	1/24/13	To:	1/24/13	Exclude Account Codes	View		
Rate (%)	State	City	County	Total Taxable Sales	Shipping Totals	Gross Taxable Sales	Tax Collected
0.0905	KS	Bonner Springs	Wyandotte	\$770.00	\$147.00	\$917.00	\$82.99
0.089	KS	Lenexa	Johnson	\$330.00	\$68.00	\$398.00	\$35.42
0.05555	KS	Lenexa	Johnson	\$5,070.00	\$675.00	\$5,745.00	\$319.13
Totals:				\$6,170.00	\$890.00	\$7,060.00	\$437.54

You can use the Include/Exclude Account Codes dropdown menu to determine whether the Accounting Code column will be displayed.

18.4 Merchant Reports

Several reports are available that summarize Marketplace commerce activity for merchant managers.

You can customize each 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/yy 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.

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 been established for that merchant.

Merchant Revenue Report

The default report shows current day information using the default of "Stores, Mobile and uPay". The report is a summary of the total revenue for the Stores, Mobile and uPay sites. Totals can be separated and summarized using the available filters.

[Export To CSV](#)

From: 1/1/13 To: 1/24/13 Filters: Stores, Mobile and uPay [View](#)

Stores Revenue

Store ID	Store Name	Number of Fulfillments	Number of Items Sold	Total Items Amount	Total Shipping Amount	Total Item + Shipping Amount	Total Tax Collected	Total Amount with Tax
3	Alumni Donations	2	2	\$377.00	\$0.00	\$377.00	\$0.00	\$377.00
15	Alumni Foundation	0	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2	Alumni Shop	0	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total:		2	2	\$377.00	\$0.00	\$377.00	\$0.00	\$377.00

uPay Revenue

Site ID	Site Name	Credit Card Transactions	Total Credit Card Transactions	Credit Card via PayPath® Transactions	Total Credit Card via PayPath® Transactions	Campus Card Transactions	Total Campus Card Transactions	ACH Transactions	Total ACH Transactions	Total Transactions	Total Revenue
0	Donations	3	\$25.00	0	\$0.00	0	\$0.00	3	\$30.00	6	\$55.00
1	Donations Too	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00
3	asdf	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00
4	adadsdfdfa	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00
5	test for QA	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00
6	Another uPay Site	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00
7	New uPay Site	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00
Total:		3	\$25.00	0	\$0.00	0	\$0.00	3	\$30.00	6	\$55.00

Merchant Tax Report

Merchant managers can view the Merchant Tax Report. This report shows a summary of activity by accounting code for all stores and uPay sites for a single merchant. The report can be displayed with or without the Accounting Code column.

Tax Report

The default report shows current day information.

[Export To CSV](#)

From: 1/24/13 To: 1/24/13 Exclude Account Codes [View](#)

Rate (%)	State	City	County	Total Taxable Sales	Shipping Totals	Gross Taxable Sales	Tax Collected
0.0905	KS	Bonner Springs	Wyandotte	\$770.00	\$147.00	\$917.00	\$82.99
0.089	KS	Lenexa	Johnson	\$330.00	\$68.00	\$398.00	\$35.42
0.05555	KS	Lenexa	Johnson	\$5,070.00	\$675.00	\$5,745.00	\$319.13
Totals:				\$6,170.00	\$890.00	\$7,060.00	\$437.54

You can use the Include/Exclude Account Codes dropdown menu to determine whether the Accounting Code column will be displayed.

18.5 Store Reports

Several reports are available that summarize Marketplace commerce activity for merchant managers, store managers, and store accountants.

You can customize each 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/yy 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.

Store Revenue Report by Product

The Store Revenue Report can be displayed by product, stock number, product type (generic, donation, or digital), and totals. This report and its four varieties are available for a store's store managers and merchant managers, as well as store accountants.

When displayed by Product, the report lists all the products that have sold during the displayed date range. You can change the date range as required.

Store Revenue Report

The default report shows current day information using the default "Stores and Mobile". The report is a summary of the total revenue for Stores and Mobile.

[Export To CSV](#)

From: 1/24/13 To: 1/24/13 Stores and Mobile Report Type: Product [View](#)

[View Multiple Product Detail Report](#)

<input type="checkbox"/>	Product Name	Quantity Sold	Sales
<input type="checkbox"/>	T-Shirt with football logo	33	\$495.00
<input type="checkbox"/>	T-Shirt with basketball logo	22	\$330.00
<input type="checkbox"/>	Sweatshirt with football logo	12	\$240.00
<input type="checkbox"/>	Sweatshirt with baseball logo	1	\$20.00
<input type="checkbox"/>	T-Shirt with tennis logo	1	\$15.00
	Total:	69	\$1,100.00

On the Store Revenue Report 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.

You can display the Product Detail Report for each product separately, or you can display the Product Detail Report for multiple products at the same time. To display the Product Detail Report for multiple products, select the

corresponding checkbox for each product that you would like to view. Then, select the View Multiple Product Detail Report button.

For examples of the Product Detail Report, see ["Product Detail Report" on page 594](#).

Store Revenue Report by Stock Number

The Store Revenue Report can be displayed by product, stock number, product type (generic, donation, or digital), and totals. This report and its four varieties are available for a store's store managers and merchant managers, as well as store accountants.

When displayed by Stock Number, the report lists all the products that have sold during the displayed date range. You can change the date range as required.

Total:
 69 | \$1,100.00 |

On the Store Revenue Report 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.

You can display the Product Detail Report for each product separately, or you can display the Product Detail Report for multiple products at the same time. To display the Product Detail Report for multiple products, select the corresponding checkbox for each product that you would like to view. Then, select the View Multiple Product Detail Report button.

For examples of the Product Detail Report, see ["Product Detail Report" on page 594](#).

Product Detail Report

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 using the default of all application types.

[Back To Store Revenue Report](#) Print Page

[Export to CSV](#)

Show columns with a zero dollar price adjustment
 Include all modifiers
 Select modifiers to export

From: 9/1/14 To: 9/25/14 [View](#)

Application Type:
 uStores
 uStores Mobile
 Point of Sale

[Hide Detail](#)

Product Name	Order Id	Terminal Id	Purchaser	Date Ordered	Date Fulfilled	Qty Fulfilled	Payment Method	Total Amount Paid
Union Donation	3946	2500	JONES/JOHN	09/10/2014 01:32:05 PM CDT	09/10/2014 01:32:06 PM CDT	1	AmEx	\$50.00
Union Donation	3945	2501	BROWN/JOE	09/10/2014 01:26:47 PM CDT	09/10/2014 01:26:47 PM CDT	1	ATM/Debit	\$20.00

The Product Detail Report without product modifiers displayed.

Product Detail Report

The default report shows current day information using the default of all application types.

[Back To Store Revenue Report](#) Print Page

[Export to CSV](#)

Show columns with a zero dollar price adjustment
 Include all modifiers
 Select modifiers to export

From: 9/1/14 To: 9/25/14 [View](#)

Application Type:
 uStores
 uStores Mobile
 Point of Sale

[Hide Detail](#)

Product Name	Order Id	Terminal Id	Purchaser	Date Ordered	Date Fulfilled	Qty Fulfilled	Payment Method	Total Amount Paid
Union Event	3908	2500	BROWN/TOM	09/08/2014 01:25:36 PM CDT	09/08/2014 01:25:37 PM CDT	1	ATM/Debit	\$305.50

Product Modifiers		
Prompt	Answer	Price
Snack	pretzels	\$0.50
Name on tote bag	Sjsksks	\$5.00
Free extras	Monkey wrench with logo	\$0.00

A Product Detail Report with modifiers displayed.

Departmental Charge

If Departmental Charge was used as the payment method (only for use with Banner by Ellucian customers), fields for Departmental Charge appear in the Payment Method Detail column of the Product Detail Report. For more information about Departmental Charge, see ["Using Departmental Charges" on page 529](#).

Store Revenue Report by Product Type

The Store Revenue Report by Product Type shows the total amount paid and the number sold for each product type. The following three product types are displayed: donation, digital, and generic.

Store Revenue Report		
The default report shows current day information using the default "Stores and Mobile". The report is a summary of the total revenue for Stores and Mobile.		
Export To CSV		
From: 1/1/10	To: 1/24/13	Stores and Mobile
Report Type: Product Type	View	
Product Type	Quantity Sold	Sales
Donation	28	\$104,713.00
Generic	1	\$50.00
Digital	13	\$0.00
Total:	42	\$104,763.00

Store Revenue Report by Totals

The Store Revenue Report by Totals shows total amounts collected for fulfillments and items sold.

Store Revenue Report								
The default report shows current day information using the default "Stores and Mobile". The report is a summary of the total revenue for Stores and Mobile.								
Export To CSV								
From: 1/24/13	To: 1/24/13	Stores and Mobile	Report Type: Totals					View
Store Name	Number of Fulfillments	Number of Items Sold	Item Amount	Shipping Amount	Item + Shipping Amount	Tax Collected	Total Amount with Tax	
Architectural Supplies	3	749	\$6,276.00	\$1,167.00	\$7,443.00	\$373.97	\$7,816.97	

Store Tax Report

Merchant managers, store managers, and store accountants can view the Store Tax Report. This report shows a summary of activity by accounting code for an individual store. The report can be displayed with or without the Accounting Code column.

Tax Report							
The default report shows current day information.							
Export To CSV							
From:	1/24/13	To:	1/24/13	Exclude Account Codes	View		
Rate (%)	State	City	County	Total Taxable Sales	Shipping Totals	Gross Taxable Sales	Tax Collected
0.0905	KS	Bonner Springs	Wyandotte	\$396.00	\$210.00	\$606.00	\$54.84
0.05555	KS	Lenexa	Johnson	\$5,070.00	\$675.00	\$5,745.00	\$319.13
Totals:				\$5,466.00	\$885.00	\$6,351.00	\$373.97

You can use the Include/Exclude Account Codes dropdown menu to determine whether the Accounting Code column will be displayed.

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.

Architectural Supplies Buyer Information Report			
The default report shows current day information.			
Export To CSV			
From:	1/24/13	To:	1/24/13
View			
Order Id	Purchaser	Date Ordered	Payment Method
174	John Doe	01/24/2013 03:13:33 PM CST	Visa
168	adf adf	01/24/2013 10:53:33 AM CST	Visa
166	John Doe	01/24/2013 10:06:52 AM CST	Visa

Recurring Payment Group Report

The Recurring Payment Group Report contains two tables. The table at the top of the report shows totals for all recurring payments that were processed during the selected date range. The second table shows all recurring payment schedules for which payments were processed during the selected date range.

The Installments column shows the number of payments that were processed for each recurring payment schedule. For example, if this column shows "3 of 13," this means three recurring payments were processed during the selected date range, and the recurring payment schedule includes a total of 13 payments.

Store Recurring Payment Group Report						
The default report shows current day information.						
Export To CSV						
From: 9/1/12 To: 1/24/13 View						
Store ID	Store Name	Processed Transactions	Processed Revenue	Pending Transactions	Pending Revenue	
3	Alumni Donations	5	\$276.00	0	\$0.00	
System Tracking ID	Payment Method	Name	Installments	Processed Revenue	Pending Revenue	Total Revenue
118	MasterCard	Scot Snyder	1 of 12	\$100.00	\$0.00	\$100.00
160	Visa	afd adf	4 of 25	\$176.00	\$0.00	\$176.00

You can view additional information on recurring payments on the Store Recurring Payment Detail Report by clicking the System Tracking ID number.

Store Recurring Payment Detail Report							
Back To Store Recurring Payment Group Report							
Export To CSV							
From: 9/1/12 To: 1/24/13 View							
Store ID	Store Name	System Tracking ID	Payment Method	Name	Number of Installments	Total Processed Revenue	Total Pending Revenue
3	Alumni Donations	160	Visa	afd adf	4	\$176.00	\$0.00
Installment	Date	Status	TPG Reference Number	Amount			
125	10/02/2012 12:00:00 AM CDT	Success	20121002000001	\$44.00			
126	11/02/2012 12:00:00 AM CDT	Success	20121102000001	\$44.00			
127	12/02/2012 12:00:00 AM CST	Success	20121202000000	\$44.00			
128	01/02/2013 12:00:00 AM CST	Success	20130102000000	\$44.00			

On the Detail Report, you can view scheduled recurring payments by selecting a future date range that includes the scheduled payments. The Status column shows payments that have been processed ("Success") and payments that are scheduled to be processed in the future ("Not Processed").

Store Recurring Payment Detail Report							
Back To Store Recurring Payment Group Report							
Export To CSV							
From: <input type="text" value="1/24/13"/> To: <input type="text" value="1/30/14"/> View							
Store ID	Store Name	System Tracking ID	Payment Method	Name	Number of Installments	Total Processed Revenue	Total Pending Revenue
3	Alumni Donations	175	Visa	John Doe	5	\$100.00	\$400.00
Installment	Date	Status	TPG Reference Number	Amount			
190	01/24/2013 12:00:00 AM CST	Success		\$100.00			
191	04/24/2013 12:00:00 AM CDT	Not Processed		\$100.00			
192	07/24/2013 12:00:00 AM CDT	Not Processed		\$100.00			
193	10/24/2013 12:00:00 AM CDT	Not Processed		\$100.00			
194	01/24/2014 12:00:00 AM CST	Not Processed		\$100.00			

In this case, assume the above screen shot was captured on 12/14/2011. Therefore, installment 580 on 12/14/11 has been processed and shows a status of "Success," while installments 581 through 587 are scheduled for future dates and show a status of "Not Processed."

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
128	Error - Invalid RevenueStream Marketplace Configuration (RSDB 20587)	View
166	Re-submit - Transmrg communication error (-23) prevented processing	View
168	Re-submit - Transmrg communication error (-23) prevented processing	View
174	Re-submit - Transmrg communication error (-23) prevented processing	View
176	Error - Credit detail code is invalid: SHIP Error - Credit detail code is invalid: MERC	View
177	Error - Credit detail code is invalid: SHIP	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).

Marketplace GL Exception Report

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.

[Back To Exception Summary Report](#)

Order Information

Order #:	174
Order Date:	01/24/2013 03:13:33 PM CST
Buyer Info:	
Name:	John Doe
Email Address:	gjohnson@touchnet.com
Payment Info:	
Type:	Credit Card
Method:	Visa
Cashier Info:	
Cashier Id:	ASDF
Host Payment Method Id:	<input style="width: 100%;" type="text"/>

Shipment Id: 177

Item	Stock #	Accounting Code
Lead Holder : blue	5006503	General Merchandise <input type="text"/>
Shipping		Delivery Expenses <input type="text"/>
Tax (1) @ 0.0905		State and Local Taxes <input type="text"/>

Purchase Fulfillment (01/24/2013 03:14:00 PM CST)

Type	Description	Amount	Message	Re-Submit	Mark Completed
shipping	Shipping	\$210.00	(R) Re-submit - Transmgr communication error (-23) prevented processing	<input checked="" type="radio"/>	<input type="radio"/>
item	Lead Holder : blue	\$396.00	(R) Re-submit - Transmgr communication error (-23) prevented processing	<input checked="" type="radio"/>	<input type="radio"/>
tax	Tax (1) @ 0.0905	\$54.84	(R) Re-submit - Transmgr communication error (-23) prevented processing	<input checked="" type="radio"/>	<input type="radio"/>

[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.

18.6 uPay Site Reports

Several reports are available that summarize Marketplace commerce activity for merchant managers, uPay site managers, and uPay site accountants.

You can customize each 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/yy 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.

uPay Revenue Report

The uPay Revenue report is available for a uPay site's site managers, merchant managers, and store accountants.

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: 1/1/13 To: 1/24/13

Number of rows per page:

[View](#)

Site ID	Site Name	Credit Card Transactions	Total Credit Card Transactions	Credit Card via PayPath® Transactions	Total Credit Card via PayPath® Transactions	Campus Card Transactions	Total Campus Card Transactions	ACH Transactions	Total ACH Transactions	Total Transactions	Total Revenue
0	Donations	3	\$25.00	0	\$0.00	0	\$0.00	3	\$30.00	6	\$55.00

Fulfillment Date	System Tracking ID	External Trans ID	Payment Method	Name	TPG Reference Number	One Time / Recurring	Payment Amount
01/06/2013 12:00:43 AM CST	113		Bank Account	gad asd asdf	80	Recurring	\$10.00
01/06/2013 12:00:42 AM CST	114		Bank Account	gsdfasdf adf	79	Recurring	\$10.00
01/06/2013 12:00:41 AM CST	115		Bank Account	asdfa asd	78	Recurring	\$10.00
01/21/2013 01:20:49 PM CST	159	A234	MasterCard	Darlene Williams	20120824000000	Recurring	-\$100.00
01/21/2013 11:38:56 AM CST	164		Visa	John Doe	20130121000000	Recurring	\$100.00
01/21/2013 01:03:58 PM CST	165	A234	Visa	Test User	20130121000001	Recurring	\$25.00

uPay Product Detail Report

The uPay Product Detail Report is available for uPay site managers, merchant managers, and accountants.

You can view this report by navigating to Marketplace Reports > uPay Sites > [uPay site] > By Product. Select a date range and click the View button. The uPay Site Revenue Report then appears for the specified date range.

The screenshot displays the 'uPay Site Revenue Report' interface. At the top, there is a purple header with the title 'uPay Site Revenue Report' and a note: 'The default report shows current day information.' Below this, there is a button labeled 'Export To CSV'. A date range selector shows 'From: 1/1/13' and 'To: 1/24/13' with a 'View' button. Below the date range is a button labeled 'View Multiple Product Detail Report'. The main content is a table with the following data:

<input type="checkbox"/>	Product Name	Number of Transactions	Sales
<input type="checkbox"/>	Donations	4	\$55.00
	Total:	4	\$55.00

All uPay site products are listed on the uPay Site Revenue Report.

The uPay Site Revenue Report lists the main uPay product and any "Additional Donations" (if applicable) that received donation funds during the selected date range. The product names listed in the Product Name column appear as links that can be selected to view the Product Detail Report for the corresponding products.

The transactions for any applicable "Additional Donation" products can be viewed separately from the uPay site's main product.

You can use the checkbox to the left of the product names to select multiple products. Then select the View Multiple Product Detail Report button. The transaction for the selected products will then be displayed on the Product Detail Report.

Note: uPay sites that do not use the "Additional Donation" feature will only show one product in the Product Name column of the uPay Site Revenue Report.

Product Detail Report

The default report shows current day information.

[Back To Upay By Product Report](#)

[Export To CSV](#)

From:

To:

[View](#)

[Show Product Detail](#)

▲▼ Product Name	▲▼ Order Id	▲▼ Purchaser	▲▼ Date Ordered	▲▼ Payment Method	▲▼ Total Amount Paid
Donations	165	Test User	01/21/2013 01:03:19 PM CST	Visa	\$25.00
Donations	164	John Doe	01/21/2013 11:38:12 AM CST	Visa	\$100.00
Donations	159	Darlene Williams	08/24/2012 09:50:02 AM CDT	MasterCard	-\$100.00
Donations	115	asdfa asd	10/06/2011 03:17:51 PM CDT	webCheck	\$10.00
Donations	114	gsdfasdf adf	10/06/2011 03:08:25 PM CDT	webCheck	\$10.00
Donations	113	gad asd asdf	10/06/2011 03:05:06 PM CDT	webCheck	\$10.00

The Product Detail Report shows the transactions for the selected date range.

The order information on this report represents all the transactions for the selected product for the selected date range. The report shows the order ID, purchases name, date ordered, payment method, and total amount paid for each transaction.

By selecting the Show/Hide Product Detail button to show/hide the e-mail address of the customer/purchaser.

The payment information in this report can be exported by using the "Export to CSV" button.

uPay Recurring Payment Group Report

The uPay Recurring Payment Group Report contains two tables. The table at the top of the report shows totals for all recurring payments that were processed during the selected date range. The second table shows all recurring payment schedules for which payments were processed during the selected date range.

The Installments column shows the number of payments that were processed for each recurring payment schedule. For example, if this column shows "3 of 13," this means three recurring payments were processed during the selected date range, and the recurring payment schedule includes a total of 13 payments.

uPay Recurring Payment Group Report							
The default report shows current day information.							
Export To CSV							
From: <input type="text" value="1/1/13"/> To: <input type="text" value="1/24/13"/> View							
Site ID	Site Name	Processed Transactions	Processed Revenue	Pending Transactions	Pending Revenue		
0	Donations	5	\$155.00	0	\$0.00		
System Tracking ID	External Trans ID	Payment Method	Name	Installments	Processed Revenue	Pending Revenue	Total Revenue
113		Bank Account	gad asd asdf	1 of 25	\$10.00	\$0.00	\$10.00
114		Bank Account	gsdfasdf adf	1 of 25	\$10.00	\$0.00	\$10.00
115		Bank Account	asdfa asd	1 of 25	\$10.00	\$0.00	\$10.00
164		Visa	John Doe	1 of 36	\$100.00	\$0.00	\$100.00
165	A234	Visa	Test User	1 of 4	\$25.00	\$0.00	\$25.00

You can view additional information on a payment plan on the uPay Recurring Payment Detail Report by clicking the System Tracking ID number.

uPay Recurring Payment Detail Report								
Back To uPay Recurring Payment Group Report								
Export To CSV								
From: <input type="text" value="9/1/12"/> To: <input type="text" value="1/24/13"/> View								
Upay Site ID	Upay Site Name	System Tracking ID	External Trans ID	Payment Method	Name	Number of Installments	Total Processed Revenue	Total Pending Revenue
0	Donations	159	A234	MasterCard	Darlene Williams	3	\$300.00	\$0.00
Installation	Date	Status	TPG Reference Number	Amount				
122	09/24/2012 12:00:00 AM CDT	Success	20121001000000	\$100.00				
123	10/24/2012 12:00:00 AM CDT	Success	20121030000000	\$100.00				
124	11/24/2012 12:00:00 AM CST	Success	20121126000001	\$100.00				

On the Detail Report, you can view scheduled plan payments by selecting a future date range that includes the scheduled payments. The Status column shows payments that have been processed ("Success") and payments that are scheduled to be processed in the future ("Not Processed").

uPay Recurring Payment Detail Report								
Back To uPay Recurring Payment Group Report								
Export To CSV								
From: <input type="text" value="9/1/12"/> To: <input type="text" value="4/24/14"/> View								
Upay Site ID	Upay Site Name	System Tracking ID	External Trans ID	Payment Method	Name	Number of Installments	Total Processed Revenue	Total Pending Revenue
0	Donations	165	A234	Visa	Test User	4	\$25.00	\$75.00
▲▼ Installation	▲▼ Date	▲▼ Status	▲▼ TPG Reference Number	▲▼ Amount				
186	01/21/2013 12:00:00 AM CST	Success	20130121000001	\$25.00				
187	04/21/2013 12:00:00 AM CDT	Not Processed		\$25.00				
188	07/21/2013 12:00:00 AM CDT	Not Processed		\$25.00				
189	10/21/2013 12:00:00 AM CDT	Not Processed		\$25.00				

In this case, assume the above screen shot was captured on 12/12/2011. Therefore, installment 15 on 12/6/11 has been processed and shows a status of "Success," while installments 16 through 27 are scheduled for future dates and show a status of "Not Processed."

uPay Posting Status Report

uPay sites that use a posting URL also have a Posting Status Report. The uPay site's site manager, merchant manager, or store accountant 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.						
Export To CSV						
From: <input type="text" value="1/1/13"/> To: <input type="text" value="1/28/13"/> View						
Date / Time	External Trans Id	System Tracking ID	Payment Status	Posting URL	Posting Status	
01/03/2013 12:00:07 AM EST		56	Success	http://pdapps:8080/upay/web/posting_test.jsp	Error	
01/09/2013 02:59:10 PM EST	A234		Cancel	http://postwagon:8080/upay60/rs_posting_test1.jsp	Error	
01/09/2013 02:59:32 PM EST	A234		Cancel	http://postwagon:8080/upay60/rs_posting_test1.jsp	Error	
01/10/2013 06:53:29 PM EST	A234		Cancel	http://postwagon:8080/upay60/rs_posting_test1.jsp	Error	
01/23/2013 10:34:33 PM EST	A234		Cancel	http://postwagon:8080/upay60/rs_posting_test1.jsp	Error	
01/25/2013 01:34:13 PM EST			Cancel	http://postwagon:8080/upay60/rs_posting_test1.jsp	Error	

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 URL was 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
4	Amount has not been submitted to host system	View
15	Amount has not been submitted to host system	View
26	Amount has not been submitted to host system	View
49	Amount has not been submitted to host system	View
50	Amount has not been submitted to host system	View
88	Being Processed	View
89	Being Processed	View
110	Re-submit - Transmrg communication error (-23) prevented processing	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).

Marketplace GL Exception Report			
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.			
Back To Exception Summary Report			
Order Info			
Order #:	4		
Order Date:	10/01/2010 03:29:02 PM EDT		
Buyer Info			
Name:	Test User		
Email Address:	test_user@touchnet.com		
Payment Info:			
Type:	Credit Card		
Method:	Visa		
Shipment Id: 4			
Accounting Code	<input type="text"/>		
Purchase Fulfillment (10/1/10 3:53 AM)			
Amount	Message	Re-Submit	Mark Completed
\$12.35	(-) Amount has not been submitted to host system	<input type="radio"/>	<input type="radio"/>
Send			

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.

Index

#

- # of cache hits 131
- # of cache misses 131
- # of cache removals 132

A

- About user groups 142, 221
- Accessibility with URL descriptions 207
- Accountant
 - adding 140, 204, 493
- Accounting codes
 - adding for stores 147
 - for tax classes 119
 - setup at system level 119
- ACH agreement in uPay
 - changing text of 435
 - page showing 408
- ACH payments, fulfillments with 374
- ACH waiting period 146, 250, 270, 296, 308
- Adding
 - Accountant 140, 204, 493
 - Administrator 140, 204, 493
 - Chief Administrator 140, 204, 493
 - Merchant Manager User 140, 204, 493
 - merchants 27, 31, 143
 - new product 245
 - new store 161
 - new uPay site 421
 - new user group 359
 - product modifier 316, 321, 331-332, 335
 - products
 - to store 245
 - roles for users 140
 - store accounting codes 147
 - Store Manager user 150
 - uPay site manager 450
 - uPay Site Manager user 150
- Address verification
 - required for ACH in uPay 430-432
 - required for credit card in uPay 429
- Administrator
 - adding 140, 204, 493
- Agreement text for uPay 435
- Allow Buyer to Create Profiles options 101
- Allow recurring payments in uPay 435
- Allow the amount to be passed in uPay 426

- Allow unlimited usage of promotion 224
- Allow user to edit payment amount in
 - uPay 427

Amount

- editable in uPay 427
- passed to uPay with validation key 429
- passing to uPay site 426

Announcement setting 102

Archiving a promotion 229

Articles

examples of 245

Authentication method

for payment methods in stores 209

B

- Back orderable option 256, 293, 320, 323, 326
- Backordered items 382
- Banner image for uPay site 452
- Buyer checkout pages secure setting 100

C

- Cache hit ratio 132
- Cache hits 131
- Cache settings 128
- Cache size, changing 129
- Cache statistics 128
- Cancel and continue buttons in uPay site 452
- Cancelled transactions, posting uPay data
 - for 437
- Cancelling recurring payment in uPay 499
- Cashier Not Found exception 577-578, 582
- Categories
 - adding for store 219
 - changing list order 111, 115
 - choosing after product import 262
 - choosing product layout for 113
 - deleting if empty 111, 116
 - design tips for 110, 115
 - empty 110, 115
 - in stores 217
 - linking to from other web sites 366
 - moving product to another 312
 - not visible if empty 217
 - planning 111
 - product layouts in 112
 - setting up for site home page 111
 - showing number of products in 100

- Category design, about 111
- Category graphics 115
 - for stores 220
- Category layouts
 - choosing 115
- Category listing order
 - changing for home page 111, 115
 - in stores 218
- Changing
 - listing order of home page categories 111, 115
 - order of products 220
 - product details 276, 283, 296, 298-299, 308
 - promotion details 228
 - quantity ordered 382
 - roles for users 140
- Chief administrator
 - adding 140, 204, 493
 - adding multiple 139
- city_county.dat file 121, 158, 240
- City_County.dat file
 - updating list of cities in 156
- Client services, contacting 1
- Contact information for uPay 435
- county.dat file, updating 156
- Creating store promotions 224
- Credit card information page in uPay 405
- Credit Card Verification page in uPay 409
- Credit card verification value, required in uPay 429
- Credit cards, fulfillments with 373
- CSV
 - file for product import 261
 - format 262
- D**
- Data, posting to a URL for uPay 399
- Default contact e-mail for site 102
- Default payment amount in uPay 428
- Default State/Province option 102
- Deleting
 - a store category 219
 - delivery methods 118
 - empty category 111, 116
- Delivery methods
 - changing for shipping class 216
 - deleting 118
 - renaming 118
 - setup 117
 - tips on 118
- Detail Code not found exception 577-578
- Detailed layout 113
- E**
- E-mail
 - address for uPay site manager 424, 437
 - addresses for promotions 225
 - alert of new purchase 387
 - default contact 102
 - for promotions 228
- Electronic banking page in uPay 403-404
- Empty categories 110, 115
 - not visible in site 217
- Encoded validation string 429
 - creating 460
- Everybody group 142, 221
- Example
 - list of localities for tax calculation 156
- Exceptions, fixing 573
- F**
- File for product import 261
- Fixing general ledger exceptions 573
- Form parameters for uPay site 451
- Frequency of recurring payments 435
- Fulfiller
 - details for 369
- Fulfilling orders 373, 380
- Fulfillment
 - if general ledger exception occurs 573
 - overview 369
- G**
- General features of site, setting up 98
- General ledger
 - accounting codes for 119
 - and store-level accounting codes 161
 - overview of fields 507
- General settings for the Marketplace
 - system 98
- Graphics
 - for categories 115
- Group logins to stores 358
- Groups
 - adding new 359
 - choosing which allowed in stores 221
- Groups Payment Methods 223
- H**
- Header image for uPay site 452
- Home page
 - categories 111

- layout for stores 165
- linking to from other web sites 365
- store listing order on 121-122, 124, 126, 173, 179, 352

I

Images

- choosing for stores 207
- for categories 115
- for site 107
- for uPay site 451, 453
- in store categories 220
- specifications for stores 207
- specifications for uPay sites 453

- Importing products 261

L

- Layout, choosing for store 165

Listing order

- for home page categories 111, 115
- for store categories 218
- for stores 121-122, 124, 126, 173, 179, 352
- of products, changing 220

Logins

- to stores for user groups 358

- Long description field 248, 269, 288, 303

M

- Managing products in store 276

Marketplace

- reports, using 587

- Max duration for recurring payments in uPay 435

- Maximum cache size 131-132

Merchant Manager

- adding new user 140, 204, 493
- tasks allowed 400

- Merchant revenue reports 591

Merchants

- adding 143

- Messages and titles setup in uPay 446

- Min/max payments in uPay 428

- Miscellaneous uPay settings 436

- Missing data exception 577, 582

Modifier

- adding 316, 321, 331-332, 335
- examples of 261

- Moving product to new category 312

- Multiple roles for users 140

- My account pages secure setting 100

N

- Name and Price layout 113

- Non-members allowed to view option 222

O

- Optional Multiple Select Checkboxes
 - modifier 231, 330

- Optional Text Entry modifier 230, 330

Options

- adding during product setup 253
- defined 245, 253
- for product, examples of 245

Order

- changing 382
- fulfilling 373

- Order of products, changing 220

P

Pages

- customizing text for uPay site 446
- making secure 100

- Parameters passed to uPay site 451

Payment

- cancelling recurring in uPay 499
- refunds in uPay 498

Payment amount

- in uPay 428
- prompt in uPay 426, 455

- Payment lookup for uPay 495

- Payment Method Selection page in uPay 401

Payment methods

- accepted for uPay 429
- settings for stores 208

Payment profiles

- allowing buyer to create 101

- Posting data for cancelled uPay
 - transactions 437

- Posting key for uPay 438

- Posting uPay data to a URL 399

- Posting URL for uPay 438

- Privacy text for uPay 440-443, 445-446

Private stores

- overview 357

Processing refunds

- for store purchases 383-384
- in uPay 498

Product

- adding using wizard 245
- backordered 382
- categories 286-287, 303

- editing details of 276, 283, 296, 298-299, 308
 - importing 261
 - long description for 248, 269, 288, 303
 - managing 276
 - moving to new category 312
 - overview 245
 - short description field 288, 298, 303
 - showing number available in category 100
 - with modifiers, adding 230, 261, 315, 330
 - with options, adding 245
 - Product details unknown 245
 - Product import file
 - column heading in 263
 - creating 261-262
 - formatting 261
 - optional column headings 263
 - Product layout
 - choosing 113
 - details of each 113
 - for home page categories 112
 - Product listing order, changing 220
 - Product Management page 276
 - Product modifier
 - adding 245, 316, 321, 331-332, 335
 - examples of 261
 - Product name field 248, 268, 297
 - Product options
 - not used in import file 262
 - Product type, selecting 248, 269
 - Product with modifiers, adding 245
 - Product with options
 - adding 245, 253
 - examples of 245
 - Products
 - tips for 245
 - Products not displayed in store
 - due to groups setup 222
 - due to home page layout 166
 - Profiles
 - allowing buyer to create 101
 - Promotion
 - allow unlimited usage of 224
 - archiving 229
 - creating 224
 - promotion code 224
 - statistics 230
 - type 224
 - updating 228
- Q**
- Quantity ordered, changing 382
- R**
- Receipt for uPay
 - contact information on 435
 - receipt page 409
 - Recurring payments
 - allowing in uPay 435
 - cancelling in uPay 499
 - in uPay 434
 - in uPay, duration of 435
 - in uPay, frequency of 435
 - page in uPay 407
 - prompt in uPay 435
 - Refunds
 - for uPay payments 498
 - processing 383-384
 - processing for store purchases 383-384
 - Registered Users group 142, 221
 - Renaming a store category 219
 - Renaming delivery methods 118
 - Reports 587
 - Merchant revenue 591
 - Revenue by merchant 589-590
 - Required selection modifier 230-232, 330, 337
 - Return policy setting 172
 - Revenue by merchant report 589-590
 - Roles
 - adding or changing for users 140
 - for users in Marketplace 96
- S**
- Sales tax setup 121, 158, 240
 - Secure pages, using 100
 - Shared secret prompt in uPay 430
 - Shipping
 - delivery methods for 117
 - shoppers' choices in 212
 - Shipping class
 - deleting 216
 - removing 216
 - setup 212
 - Shipping profiles
 - allowing buyer to create 101
 - Shipping rates
 - setup 212
 - Short description for product 288, 298, 303

- Show total number of reachable orderable products setting 100
 - Site-level images, setting 107
 - Site connection details 132
 - Site logo
 - URL and description for link 108
 - Site manager
 - e-mail address in uPay 424, 437
 - selecting for uPay site 450
 - Site setup
 - planning 94
 - SKUs, how tracked 245, 253
 - Sort key, format required 116
 - Special announcement 102, 167
 - Statistics for promotions 230
 - Stock # option 256, 273, 291, 319, 323, 326
 - Store
 - adding 161
 - announcement setting 167
 - bringing online 175, 177, 353
 - bringing online before fully set up 174
 - categories 217
 - graphics for 220
 - category listing order 218
 - choosing groups allowed in 221
 - display name setting 164, 183
 - home page layout 165
 - linking to from other web sites 365
 - listing order 121-122, 124, 126, 173, 179, 352
 - name setting 182
 - promotions, creating 224
 - restricting entry to 357
 - return policy setting 172
 - setting general features of 162
 - taking offline 175, 177, 353
 - Store-level accounting codes 161
 - Store manager
 - adding 150
 - Store settings
 - category setup 217
 - groups payment methods 223
 - overview 162
 - payment methods 208
 - shipping rates 212
 - System-level categories 111
 - System Administration settings 98
 - System integration map 132
 - System settings
 - accounting codes 119
 - cache settings 128
 - categories 111
 - delivery methods 117
 - general 98
 - images 107
 - store listing order 121-122, 124, 126, 173, 179, 352
 - tax account codes 120, 154, 239
- T**
- Tax account codes, assigning to tax classes 120, 154, 239
 - Tax classes
 - accounting codes for 119
 - assigning account codes to 120, 154, 239
 - Tax rates
 - setup 121, 154, 239
 - shipping address 215, 240
 - used for shipping 214
 - Taxes
 - updating list of cities and counties for 156
 - taxrates.dat file 121, 158, 240
 - Thumbnail layout 113
 - Total # of requests 131
 - Track inventory option 256, 293, 320, 323, 326
- U**
- uPay
 - customizable features in 401
 - overview of user experience 399
 - passing amounts into site 426
 - payment lookup 495
 - payment refunds 498
 - uPay settings
 - form parameters 451
 - messages and titles 446
 - miscellaneous 436
 - payment settings 423
 - recurring payments 434
 - Site Manager 450
 - users 450
 - uPay site
 - changing features of 483
 - creating 421
 - customizing page text 446
 - images in 451, 453
 - verifying information for 451
 - uPay Site Manager
 - adding new user 150
 - UPAY_SITE_ID parameter 457
 - URL
 - description for site logo 108

- descriptions, using 207
- for site logo 108

User groups

- about 142, 221
- adding new 359
- overview 357

Users

- roles in Marketplace 96

Using reports 587

uStore

- bringing online 175, 177, 353
- overview and planning 94
- planning checklist 95-97
- taking offline 175, 177, 353

V

Validation key in uPay 429, 460

W

Waiting period for ACH 146, 250, 270, 296,
308