Setting up your TouchNet Marketplace uStore
Topics Covered:

- Logging into TouchNet
- Accessing your store
- Email Messages
- Single Store Settings
- Store Template Settings
- Users
- Categories
- Products including Options & Modifiers
- Promotions
- User Modifiers
- Resources
Things to consider before setting up your uStore

• What are the products, categories, and GL Codes associated with each product?
• Do we want to restrict access to the site or certain products?
• Do we want to offer sales or promotions?
• What information do we want to gather from the customer?
• Do we have an image for our products and store homepage?
• Who will need administrative access to the store?
Logging into TouchNet

TouchNet is a payment gateway and has very strict security protocols. If you experience login problems:

• Clear your browser cache and cookies
• Do not login with a bookmark, use the links below:

TouchNet TEST Environment:
https://test.secure.touchnet.net:8443/centraltest

TouchNet PRODUCTION Environment:
https://secure.touchnet.net:443/central

If you do not have TouchNet login credentials or have been locked out of your account, please contact: otm_ecommerce@harvard.edu.
The quickest and easiest way to set up your uStore is to navigate through each menu item under **Store Settings** following prompts and using wizards.

**Applications > Marketplace > [Merchant] > Store Settings**

Each store’s general settings can be changed easily whenever necessary by the store manager. You will have a better idea of your store’s total design if you make initial choices and then edit as necessary while you build the store.
Throughout the editing process, you can view your store as the customer will see it from the Marketplace Operations Center Home.
General Settings

In the TEST Environment you can use either “Enable” or “Preview”.

Important: Do Not Enable your store in the PRODUCTION Environment. The Cash Management eCommerce team will enable your store when it is ready to go live.
General Settings Cont.

Notifications fields are intended to notify store staff not customers.

If your store will be selling digital products and you do not have enough available space, please contact the eCommerce team.

The eCommerce team will add the accounting codes you provide on your TouchNet uStore application.

Always remember to click “Save”. There may be multiple “Save” buttons on each screen.
Email Messages:
Customers will have the option to print a copy of their order receipt from their web browser at the conclusion of their purchase. They will also automatically receive email messages with order status confirmation.

Thank You Statement appears on fulfillment e-mail notifications, order cancellation e-mail notifications, and refund confirmation generated to customers after orders have been placed.
Email Messages Cont.

**Example of email order receipt received by customer**

**Order Receipt TEST**

**This is where the THANK YOU STATEMENT APPEARS**

**ORDER ANNOUNCEMENT TEXT GOES HERE**

<table>
<thead>
<tr>
<th>Order:</th>
<th>$39.99</th>
</tr>
</thead>
<tbody>
<tr>
<td>Store:</td>
<td>Harvard eCommerce</td>
</tr>
<tr>
<td>Date/Time:</td>
<td>November 27, 2017 2:17:53 PM EST</td>
</tr>
<tr>
<td>Total:</td>
<td>$39.99</td>
</tr>
</tbody>
</table>

**Billed To:**
Martha McEwan
1033 Mass ave
Cambridge, MA 02138-0000
United States

**Contact Email:**
marta_mcewan@harvard.edu

**Payment Information:**

<table>
<thead>
<tr>
<th>Payment Type:</th>
<th>Credit Card</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit Card Number:</td>
<td>00000000000000000000000000000000</td>
</tr>
<tr>
<td>Reference Number:</td>
<td>01234567890123456789012345678901</td>
</tr>
<tr>
<td>Expiration Date:</td>
<td>01/2023</td>
</tr>
<tr>
<td>Card Type:</td>
<td>American Express</td>
</tr>
</tbody>
</table>

**Shipping Information:**

<table>
<thead>
<tr>
<th>Delivery Method:</th>
<th>None</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shipping Address:</td>
<td>87</td>
</tr>
</tbody>
</table>

**Item Information:**

<table>
<thead>
<tr>
<th>Item</th>
<th>Unit Price</th>
<th>Detail Total</th>
</tr>
</thead>
</table>

**Subtotal:** $39.99

**Tax:** $0.00

**Total:** $39.99

For questions, comments, or order status, send email to ecommerce@harvard.edu and refer to Order #85. Visit our online.

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**Example of the screen seen by the customer at the end of the checkout process**

**Order Receipt**

Thank You!

This is your order summary.

An Order confirmation email was sent to the following address: martha_mcewan@harvard.edu

**Order #85 Harvard eCommerce**

<table>
<thead>
<tr>
<th>Payment</th>
<th>Details</th>
<th>Billing Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>AmEx</td>
<td>20171127000004</td>
<td>Martha McEwan 1033 Mass ave Cambridge, MA 02138-0000 United States</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item Information</th>
<th>Amount</th>
</tr>
</thead>
</table>

SubTotal: $39.99

Tax: $0.00

Total: $39.99

Print Continue Shopping
Indicate if you would like the **Promotion Code** box to show during the checkout process.

Promotion details are set separately.
Single-Store Cont.

Use **Alternate Text Settings** to make simple changes to button text (e.g., changing **Add to Cart** to **Donate**.)
Store Template Setup:

The **Designer: Fixed Width** template is a new feature within TouchNet. It offers greater ability to customize and brand your uStore without needing to know HTML or CSS. The **Classic** template will eventually be phased out. We strongly recommend creating your store with the **Designer: Fixed Width** template.
Store Template Setup

On the **General Layout** tab, as you move your mouse over each component, a purple outline will appear around each component that can be configured. You can click on the various components to see the related configuration settings.

**Main Home Page Image**
- We recommend you use an image:
  - 1140 pixels wide by 320 pixels high
  - Accepted file formats: JPG, GIF, or PNG
  - Maximum file size is 250 KB

**Optional area for customized HTML and CSS.**
- *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.*
Template Setup: Single Store Branding Cheat Sheet

- **Fly-out Menu Curtain**
- **Global NavBar**
- **Single Store Header**
- **Body Color**
- **Main Content Color**
- **Heading 1**
- **Heading 2**
- **Body Font (size)**
- **Hyperlink**
- **Store Footer**
- **Global Footer**

*Headings 3-6 are for optional template components*
The Single Store Images tab allows you to upload, manage, and preview images. These images can be used with fields that support HTML or CSS. Some of these HTML fields include: **Feature 1 field**, **Privacy Policy**, **Site Info**, **Help**, **Accessibility**, **Single Store Header**, and **Single Store Footer**.
Users

Every store needs to have at least one user assigned to the following roles:

**Store Managers** – Responsible for managing store settings, such as the store images, store categories, store payment methods, and shipping rates. Responsible for assigning store clerks, a store accountant, and fulfillers. Responsible for adding and editing products and creating store promotions. [A Store Manager will not be able to perform the functions of the roles below unless they assign themselves to these roles.]

**Fulfillers with refund/cancel rights** – Responsible for fulfilling orders as well as refunding and cancelling orders.

**Store Accountants** – Responsible for reviewing the Revenue by Merchant report.
Categories

Examples of category layouts/views

**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.

**Thumbnail Layout.** The shopper sees product thumbnail images and names. This layout works well for many product groupings.

**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.
Products

There are three ways to add products: Add a single product, import multiple from a .csv file, or clone an existing product.

Once products are added, you can group them as Related Products. When a shopper views any product in this group, the page will display recommendations of other products in that group.

You can Clone an existing product from within that product’s settings.
Adding single product

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.

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.
Adding a single product

Choose from shipping classes you have created

Tax rates will vary, discuss with your Finance Office and Marketplace Administrator

Select product accounting code if differs from the default

Access to purchase products can be restricted

Message will appear on the packing slip that is printed during the fulfillment process
Products Cont.

Adding single product

<table>
<thead>
<tr>
<th>Item for Sale Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item for Sale</td>
</tr>
<tr>
<td>Umbrella</td>
</tr>
<tr>
<td>Price in USD ($)</td>
</tr>
<tr>
<td>Price</td>
</tr>
<tr>
<td>Stock Number</td>
</tr>
</tbody>
</table>

Assign Random Stock #: Check to see if stock number is already used

Limit Quantity:
- Yes, Maximum Per Order: [ ]
- No [ ]

Track Inventory:
- Yes, Initial Inventory: [ ]
- No [ ]

Out of Stock Message (This message will appear if the item goes out of stock):
- [500 characters max]
- [HTML Allowed]

Low Inventory Notification:
- Yes, Low Inventory Notification Quantity: [ ]
- No [ ]

Back Orderable:
- Yes [ ]
- No [ ]

Auto Fulfill:
- Yes [ ]
- No [ ]

Product Notification
To send product notifications, enter email address. For multiple email addresses, use a comma as a separator.

Email Addresses: [500 characters max]

Important: Auto Fulfill will complete the purchase and charge the customer’s card at the time of purchase. Products that are set not to Auto Fulfill will remain as pending and the customer’s card will not be charged until a store administrator assigned the role of Fulfiller completes the fulfillment process.

This field is intended to notify store administrators, not customers.
After product has been added you can manage the product from the **Products** screen or select the desired product to add **Options** and **Modifiers**.

Product settings can be changed by clicking on the product name or settings gear dropdown menus.
Important Product Settings: **Options** and **Modifiers** allow you to offer variations on products and gather buyer info.
Options vs. Modifiers: An Option is a factor such as size or color that may or may not change the price but results in a different inventory item. A Modifier allows you to gather additional buyer info. It may or may not change the price but does not result in a different inventory item.

Example of a product with both an Option and Modifier

On the previous product screen the “Kids - $19.99” Option was selected, resulting in a different product/stock number.

A Modifier was added to gather additional buyer info for an optional feature.
Products Cont.

To set up **Options**, you will first choose your **Options**, then you will assign them **Values**.

**Options** as the customer sees them

**Values** as the customer sees them
Products Cont.

To add a **Modifier**: select the desired product from **Products** to access **General Settings** and **Add Modifier**. You will be taken to the **Mange Modifiers** screen.

There are three types of **Modifiers** that can be used to gather buyer info.

These **Modifiers** can be arranged for easier viewing with the **Table Builder**.
Text Entry Modifiers: the shopper is asked to enter a text response to a prompt. This is useful for names and other custom buyer info.

**Frequency** comes into play if two or more the product is purchased.

**Static** will display the modifier prompt only once.

**Dynamic** will display it for each quantity ordered.

For example, if multiple people register for an event, **Static** will only ask for one name, **Dynamic** will ask for each attendee’s name.
Products Cont.

**Drop-down Selection Modifier:** customer will be prompted to choose only one option from a list.

- Price adjustments can be increased, decreased, or no change.

Example of how the customer will see the **Drop-down Modifier** during the checkout process.
**Products Cont.**

**MultiSelect Checkbox**: prompts customer to select one or more options.

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**Example of MultiSelect Checkbox seen by customer**

<table>
<thead>
<tr>
<th>Selection</th>
<th>Price Adjustment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signed Copy of Keynote Speaker's Book</td>
<td>25.00</td>
</tr>
<tr>
<td>Tote Bag</td>
<td>10.00</td>
</tr>
<tr>
<td>Coffee Mug</td>
<td>8.00</td>
</tr>
</tbody>
</table>

---

**Stock number**: 0088076

**Price**: $300.00

**Quantity**: 1

**Extras**
- Signed Copy of Keynote Speaker's Book ($25.00)
- Tote Bag ($10.00)
- Coffee Mug ($8.00)

**Indicates required information**
Attendee List: will allow prospective customers to see a list of people who have already registered (purchased the product.) Registrants can opt out of being included in the Attendee List.

The option to Add List will only appear after Modifiers have been added to a product.
Products Cont.

Table Builder: once **Modifiers** are added to a product, **Table Builder** can be used to organize them maximizing horizontal space. This is especially useful if the customer is allowed to purchase two or more of the same item.
Products Cont.

To add a Digital Products:

1. Request digital space from otm_ecommerce@Harvard.edu
2. When adding in Products, select Digital and add as you would any other product

Indicate maximum amount of times the customer can download the file from one purchase.

Indicate how long the customer has to complete their downloads.
Products Cont.

The **Donation** Product Type is used for any product that requires the user to enter a custom amount such as an invoice.

<table>
<thead>
<tr>
<th>Product Type</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Generic</td>
<td></td>
</tr>
<tr>
<td>Digital</td>
<td></td>
</tr>
<tr>
<td><strong>Donation</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Product Name** will be seen by the customer.

**Donation** must be selected.
Categories

Top-Level Categories will be displayed on your store’s home page.

After adding Top-Level Category, select Edit or Add Sub-Category to continue customizations for each category.
Promotions

Promotional Code offers the opportunity to provide discounts to certain customers.

Promo code as seen during check out process

Checking this box will give you the opportunity to compose an email to customers, offering the promotion.
User Modifiers

A modifier that is not product related. It is used to collect additional buyer information during the checkout process.
Resources

Cash Management eCommerce Team (Marketplace Administrators)

Martha McEwan
eCommerce Analyst
martha_mcewan@harvard.edu
617-495-5630

Stephanie Motta
eCommerce Manager
stephanie_motta@harvard.edu
617-496-6130

Harvard TouchNet Resources

- Modifier Report – for additional information you gathered about the buyer
- Issuing Refunds
- Reconciliation Guide