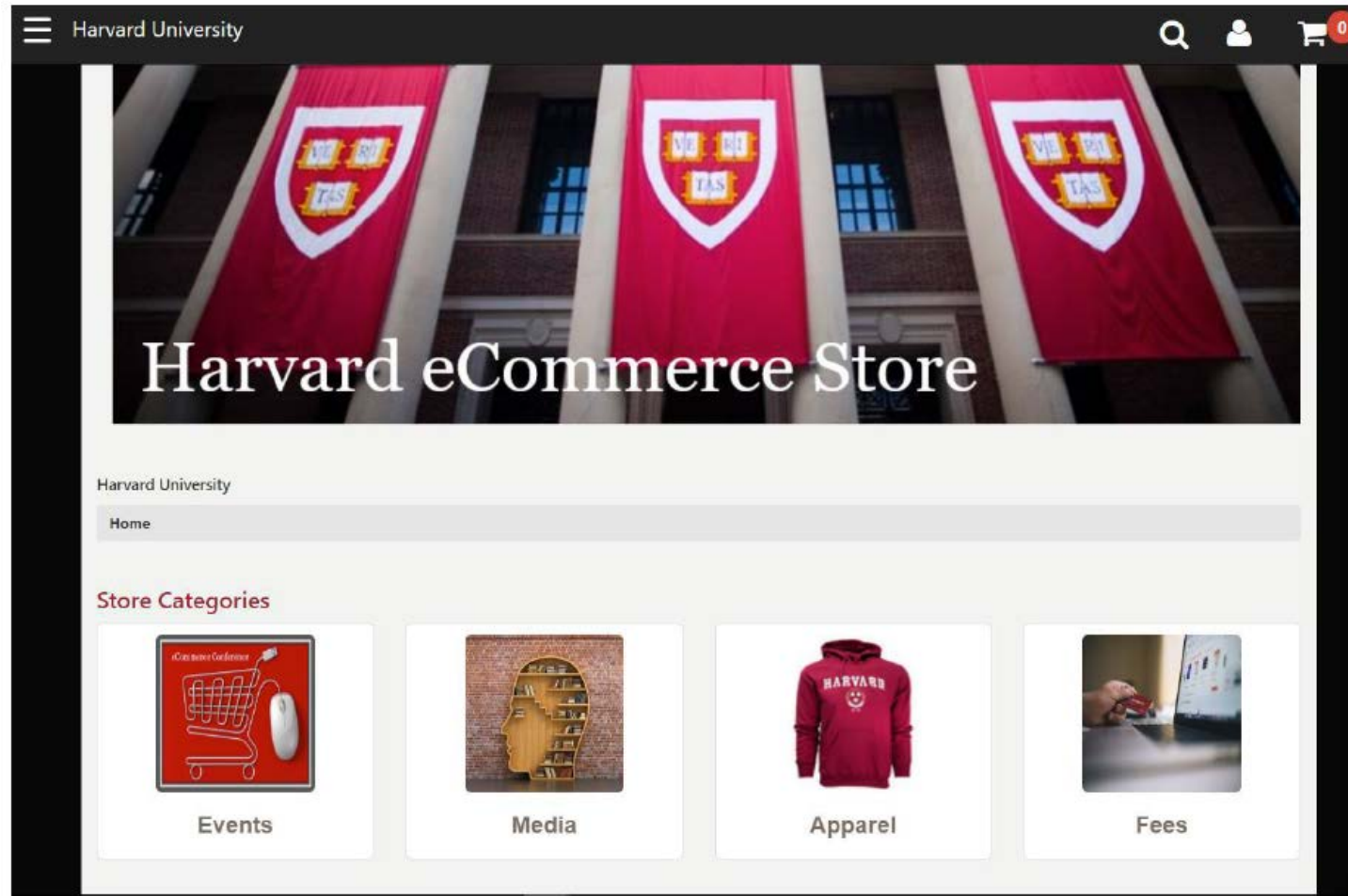


Setting up your TouchNet Marketplace uStore



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.

TouchNet[®] | U.Commerce[®] Central **TEST**

Home Dashboard ▾ Applications ▾ Administration Client Commu

Payment Gateway
Marketplace

Settings on this page change your store display an

▼ Marketplace Home
► System Administration
► Athletic Classes
► Baker Library
► Dental School
► Divinity School
► GSD
▼ Harvard eCommerce
Settings
Accounting Codes
Users
Tax Account Codes
▼ Stores
Add New Store
▼ Harvard eCommerce
▼ Store Settings
General
Status Management
Email Messages
Text Messages
Single Store
Store Template Setup **NEW!**
Users
Payment Methods
Shipping Classes
Categories
Products
Allowed Groups
Group Payment Methods
Promotions
User Modifiers
Tax Service
Tax Account Codes

Commerce Gener

General Settings

Store Id : 45
Store Name: H
Store Display Name: H
Store status: En
Ma

Applies only to this store and products Managem

Time Zone: E

Donation Notification

To send donation notifications, enter email address separator.

Email addresses:
(500 chars max)

Low Inventory Product Notification

To send low inventory notifications for products, use a comma as a separator.

Email addresses:
(500 chars max)

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

TouchNet
+ Heartland

U.Commerce Central TEST

Martha McEwan

Home

Dashboard

Applications

Administration

Client Community

Help

Marketplace Home

System Administration

Athletic Classes

Baker Library

Dental School

Divinity School

GSD

Harvard eCommerce

Harvard Library

HMS-Vanderbilt Hall

Kennedy School

TEST Alumni Assoc

TEST MEM

TEST Merchandise

TEST Merchant

Marketplace Reports

Marketplace Exceptions

Edit My Profile

Help

Marketplace Operations Center Home

Print Page

Click on links to access Mall, Store, Mobile and uPay sites. Search for Order Id or System Tracking Id. Status can be changed on store and upay sites.

Mall Link and Search

Harvard Test Mall

View Mall

Order or System Tracking ID :

Search

Advanced Search

Stores

Show 10 entries

Search:

<input type="checkbox"/>	Name	Id	Template	Type	Merchant Name	Web	Fulfillments Pending	Links	
<input type="checkbox"/>	Divinity School	11	Classic	Single	Divinity School	Enabled	0	View Store	
<input type="checkbox"/>	Dustin's Athletic Store	18	Classic	Single	Athletic Classes	Enabled	0	View Store	
<input type="checkbox"/>	Fall 2017 RF	27	Classic	Single	GSD	Enabled	0	View Store	
<input type="checkbox"/>	Graduate School of Design	13	Classic	Single	GSD	Enabled	2	View Store	
<input type="checkbox"/>	Harvard Divinity Bulletin Store	31	Designer: Fixed Width	General	Divinity School	Enabled	0	View Store	
<input type="checkbox"/>	Harvard eCommerce	45	Designer: Fixed Width	Single	Harvard eCommerce	Enabled	0	View Store	

5

General Settings

TouchNet + Heartland | UCommerce Central TEST | Martha McEwan

Home Dashboard Applications Administration Client Community Help

Marketplace Home
System Administration
Athletic Classes
Baker Library
Dental School
Divinity School
GSD
Harvard eCommerce
Settings
Accounting Codes
Users
Tax Account Codes
Stores
Add New Store
Harvard eCommerce
Store Settings
General
Status Management

Harvard eCommerce General Settings

Settings on this page change your store display and global options that will apply to products.

General Settings	
Store Id :	45
Store Name:	Harvard eCommerce
Store Display Name:	Harvard eCommerce
Store status:	Enabled Manage Status
Applies only to this store and products Management Status	
Time Zone:	Eastern Standard Time - America/New_York (-5:01)

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.

The screenshot shows the 'General' settings page. On the left is a sidebar menu with options like 'General', 'Status Management', 'Email Messages', 'Text Messages', 'Single Store', 'Store Template Setup', 'Users', 'Payment Methods', 'Shipping Classes', 'Categories', 'Products', 'Allowed Groups', 'Group Payment Methods', 'Promotions', 'User Modifiers', 'Tax Service', 'Tax Account Codes', 'Order Search', 'GL Exceptions (0)', 'uPay Sites', 'Harvard Library', 'HMS-Vanderbilt Hall', 'Kennedy School', 'TEST Alumni Assoc', 'TEST MEM', 'TEST Merchandise', 'TEST Merchant', 'Marketplace Reports', 'Marketplace Exceptions', 'Edit My Profile', and 'Help'. The main content area has several sections: 'Time Zone' (set to 'Eastern Standard Time - America/New_York (-5:01)'), 'Donation Notification' (with an email address field containing 'martha_mcewan@harvard.edu'), 'Low Inventory Product Notification' (also with 'martha_mcewan@harvard.edu'), 'Digital Files' (showing 'Total Digital File Space Used By Store (bytes): 5,910,963' and 'Total Size Available for Digital Files (bytes): 10,485,760'), 'Admin Settings' (with radio buttons for 'Allow Partial Refunds', 'Allow The Refunding Of Shipping', 'Allow Recurring Payments On Donation Product Type', 'Perform General Ledger Updates', and a dropdown for 'Default Accounting Code' set to '[common] Branded Items'), and 'Continue Shopping Button Settings' (with a dropdown set to 'Navigate to Store Page'). At the bottom left is a 'Save' button. Red arrows point from external text boxes to the email fields, the digital file space section, the accounting code dropdown, and the Save button.

General

Status Management

Email Messages

Text Messages

Single Store

Store Template Setup **NEW!**

Users

Payment Methods

Shipping Classes

Categories

Products

Allowed Groups

Group Payment Methods

Promotions

User Modifiers

Tax Service

Tax Account Codes

Order Search

GL Exceptions (0)

uPay Sites

Harvard Library

HMS-Vanderbilt Hall

Kennedy School

TEST Alumni Assoc

TEST MEM

TEST Merchandise

TEST Merchant

Marketplace Reports

Marketplace Exceptions

Edit My Profile

Help

Time Zone: Eastern Standard Time - America/New_York (-5:01)

Donation Notification

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

Email addresses: (500 chars max) martha_mcewan@harvard.edu

Low Inventory Product Notification

To send low inventory notifications for products, enter email address. For multiple email addresses use a comma as a separator.

Email addresses: (500 chars max) martha_mcewan@harvard.edu

Digital Files

Total Digital File Space Used By Store (bytes):	5,910,963
Total Size Available for Digital Files (bytes):	10,485,760

Admin Settings

Allow Partial Refunds: ☒ Yes ☐ No

Allow The Refunding Of Shipping: ☒ Yes ☐ No

Allow Recurring Payments On Donation Product Type: ☒ Yes ☐ No

Accounting code is required to complete updates to the General Ledger.

Perform General Ledger Updates: ☒ Yes ☐ No

Default Accounting Code: [common] Branded Items

Continue Shopping Button Settings

To configure where the Continue Shopping button on the Shopping Cart page takes an end user, select a value in drop down list below

Continue Shopping Button settings: Navigate to Store Page

Save

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.

▼ Marketplace Home
▶ System Administration
▶ Athletic Classes
▶ Baker Library
▶ Dental School
▶ Divinity School
▶ GSD
▼ Harvard eCommerce
 Settings
 Accounting Codes
 Users
 Tax Account Codes
 ▼ Stores
 Add New Store
 ▼ Harvard eCommerce
 ▼ Store Settings
 General
 Status Management
 ☒ Email Messages
 Text Messages
 Single Store
 Store Template Setup **NEW!**
 Users
 Payment Methods
 Shipping Classes
 Categories
 Products
 Allowed Groups
 Group Payment Methods
 Promotions
 User Modifiers
 Tax Service
 Tax Account Codes
 Order Search
 GL Exceptions (0)
 ▶ uPay Sites

Harvard eCommerce Email Messages

Settings on this page change messages included in uStore emails.

Email Messages

Thank You Statement: (500 chars max)

Order Announcement: (5,000 chars max)

Fulfillment Announcement: (5,000 chars max)

Cancel Order Announcement: (5,000 chars max)

Refund Order Announcement: (5,000 chars max)

Email Messages Recurring

Recurring Success Announcement: (5,000 chars max)

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.

Order Receipt

Thank You!

This is your order summary.

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

[Print](#) [Continue Shopping](#)

Order #85 Harvard eCommerce

Payment	Details	Billing Information
AmEx Reference Number: 20171127000004	xxxxxxxxxx4343 Martha McEwan	Martha McEwan 1033 Mass ave cambridge, MA 02138-0000 United States

Item Information	Amount
Magazine Subscription : 2 Years / 24 Issues - \$39.99	\$39.99
SubTotal:	\$39.99
Tax:	\$0.00
Total:	\$39.99

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

Order Receipt TEST

This is where the THANK YOU STATEMENT APPEARS

ORDER ANNOUNCEMENT TEXT GOES HERE

Order:	85
Store:	Harvard eCommerce
Date/Time:	November 27, 2017 2:17:02 PM EST
Total:	\$39.99

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

Contact Email:
martha_mcewan@harvard.edu

Payment Information:
Payment Type: Credit Card
Credit Card Number: xxxxxxxxxxxx4343
Reference Number: 20171127000004
Card Type: AmEx
*** Card Not Present ***

Shipping Information:
Shipping Information: 87
Delivery Method: None

Item	Unit Price	Detail Total
Magazine Subscription : 2 Years / 24 Issues - \$39.99	\$39.99	\$39.99
Subtotal:		\$39.99
Tax:		\$0.00
Total:		\$39.99

For questions, comments, or Order status, send email to olm_ecommerce@harvard.edu and refer to Order 85. Visit us [online](#).

Example of email order receipt received by customer

Single-Store Settings

▼ Harvard eCommerce

▼ Store Settings

- General
- Status Management
- Email Messages
- Text Messages
- Single Store**
- Store Template Setup NEW!
- Users
- Payment Methods
- Shipping Classes
- Categories
- Products
- Allowed Groups
- Group Payment Methods

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:

☒ Single store mode
☐ 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):

Display Settings

Show Cart Quantity: ☒ Yes ☐ No

Show Promotional Code: ☒ Yes ☐ No

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

Promotion details are set separately.

Order Summary

Item Total:	\$62.97
Promo discount:	-\$18.90
Delivery Charge:	\$4.99
Tax:	\$0.00
Total:	\$49.06

Delivery Address

Martha McEwan
1033 Mass ave
cambridge, MA 02138-0000
United States

[Change Delivery Address](#)

Promotional Code

Promotional Code:

(You can use one code per Cart.)

[Apply](#)

✓ Applied Promotion: "30SALE"


Single-Store Cont.

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


Alternate Text Settings	
Alternate "Add to Cart" Text:	<input type="text" value="Pay Invoice"/>
Alternate "Shopping Cart" Text:	<input type="text"/>
Alternate "Continue Shopping" Text:	<input type="text"/>

Invoice Payment

Home / Invoice Payment / Invoice Payment


 Pay Invoice

Invoice Amount: \$


Add To Cart 

Invoice Payment

Home / Invoice Payment / Invoice Payment

 Pay Invoice

Invoice Amount: \$

Pay Invoice 

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.

The screenshot shows the 'Marketplace Store Templates' page. On the left is a navigation menu with categories like 'Marketplace Home', 'System Administration', 'Athletic Classes', 'Baker Library', 'Dental School', 'Divinity School', 'GSD', 'Harvard eCommerce', 'Settings', 'Accounting Codes', 'Users', 'Tax Account Codes', 'Stores', 'Add New Store', 'Harvard eCommerce', 'Store Settings', 'General', 'Status Management', 'Email Messages', 'Text Messages', 'Single Store', 'Store Template Setup' (highlighted with a green box and 'NEW!' tag), 'Users', 'Payment Methods', 'Shipping Classes', 'Categories', 'Products', and 'Allowed Groups'. The main content area is titled 'Marketplace Store Templates' and includes a 'Print Page' link. Below the title is a yellow box with the text 'Select a template below to setup your store layout.' Two template cards are displayed: 'Classic' and 'Designer: Fixed Width'. The 'Classic' card shows a simple layout with a 'Set To Current' and 'Edit' button, and a green checkmark indicating it is the 'Original 7.0 Marketplace'. The 'Designer: Fixed Width' card shows a more complex layout with a 'NEW!' badge, a 'Current' button (highlighted in purple), and an 'Edit' button. It also has two green checkmarks indicating features: 'Fixed Hero Image' and 'Single Feature Section'.

Marketplace Home
▶ System Administration
▶ Athletic Classes
▶ Baker Library
▶ Dental School
▶ Divinity School
▶ GSD
▼ Harvard eCommerce
Settings
Accounting Codes
Users
Tax Account Codes
▼ Stores
Add New Store
▼ Harvard eCommerce
▼ Store Settings
General
Status Management
Email Messages
Text Messages
Single Store
☒ Store Template Setup **NEW!**
Users
Payment Methods
Shipping Classes
Categories
Products
Allowed Groups

Marketplace Store Templates

Print Page

Select a template below to setup your store layout.

Classic

Set To Current Edit

✓ Original 7.0 Marketplace

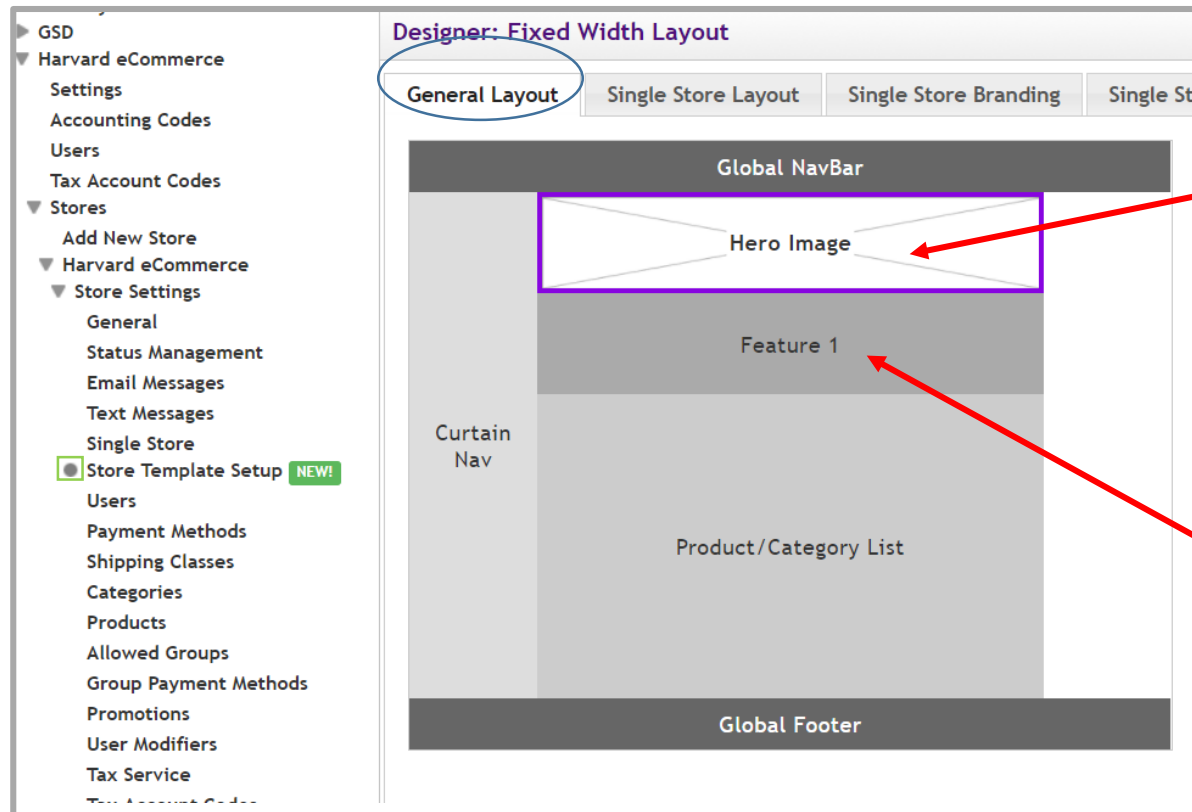
Designer: Fixed Width **NEW!**

Current Edit

✓ Fixed Hero Image
✓ Single Feature Section

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

Harvard University

Single Store Header Appears Here

Harvard eCommerce Store

Harvard University

Home

Store Categories

Events

Publications

Apparel

Invoice Payment

Single Store Footer Appears Here

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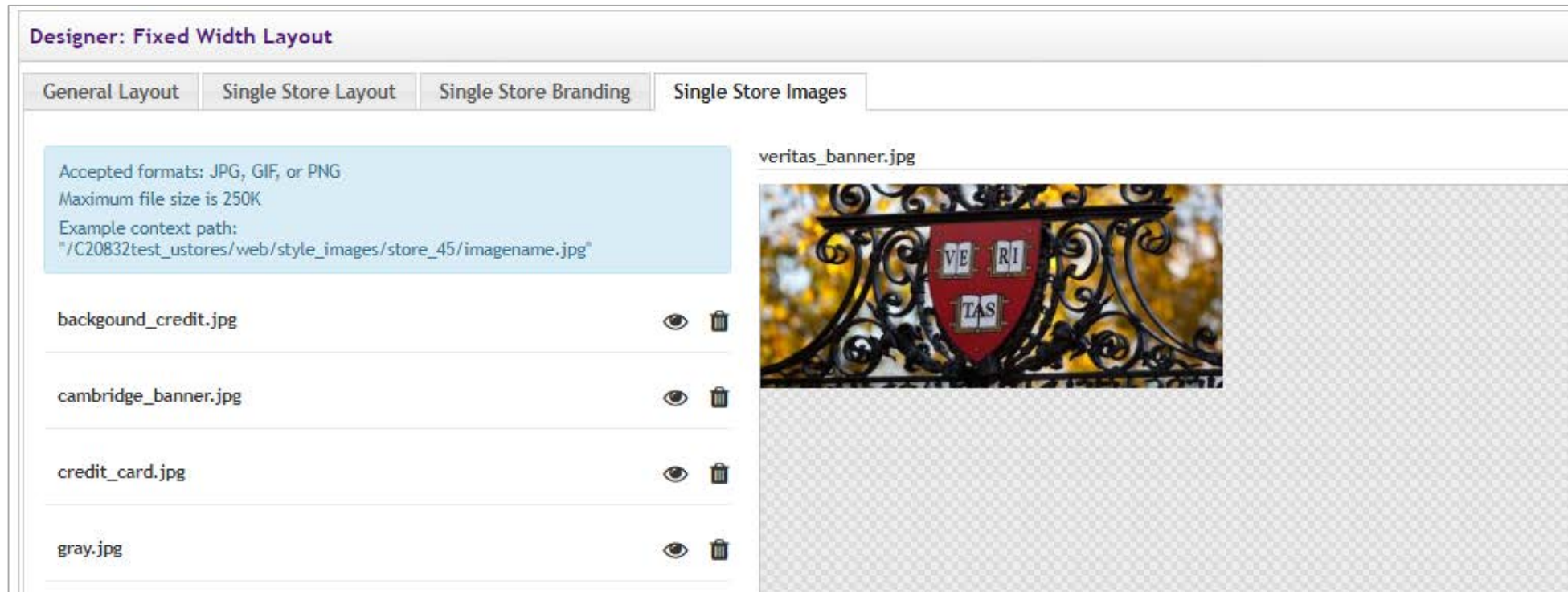
Store Links:

Secured by touchnet®

*Headings 3-6 are for optional template components

Store Template Setup Cont.

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:

Marketplace Home
System Administration
Athletic Classes
Baker Library
Dental School
Divinity School
GSD
Harvard eCommerce
Settings
Accounting Codes
Users
Tax Account Codes
Stores
Add New Store
Harvard eCommerce
Store Settings
General
Status Management
Email Messages
Text Messages
Single Store
Store Template Setup **NEW!**
Users
Payment Methods
Shipping Classes
Categories
Products
Allowed Groups
Group Payment Methods
Promotions
User Modifiers
Tax Service
Tax Account Codes
Order Search
GL Exceptions (1)
uPay Sites

Edit User [Print Page](#)

Add or remove user roles. User changes will be effective at next login.

Application was successfully updated.

[Back To Users](#)

User Status

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

User Information

U. Commerce Username:	C20832.mmcewan
First Name:	Martha
Last Name:	McEwan
U. Commerce Email:	martha_mcewan@harvard.edu
Email:	

Marketplace Roles

Assigned Roles	Available Roles
Remove	Add
Manager	<input checked="" type="checkbox"/> Fulfiller with cancel/refund rights
	<input type="checkbox"/> Fulfiller
	<input type="checkbox"/> Store Clerk
	<input checked="" type="checkbox"/> Store Accountant

[Save](#)

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.]**

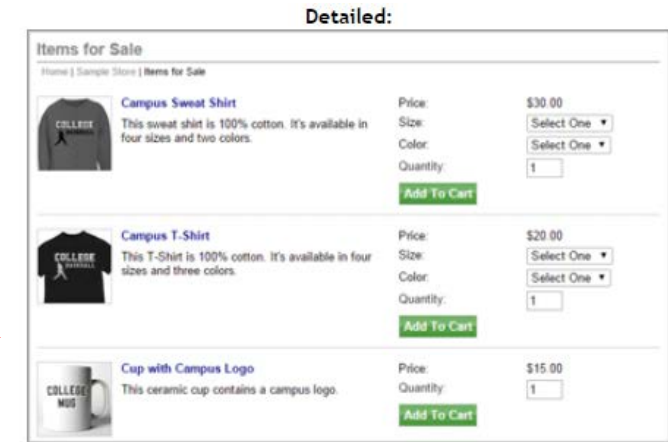
Fulfillers with refund/cancel rights – Responsible for fulfilling orders as well as refunding and cancelling orders.

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

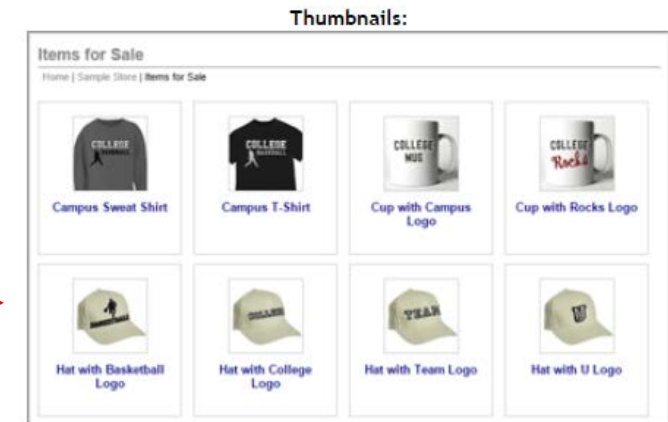
Categories

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.

Name and Price:

Name	Price	Actions
Campus Sweat Shirt	\$30.00	View Details
Campus T-Shirt	\$20.00	View Details
Cup with Campus Logo	\$15.00	View Details
Cup with Rocks Logo	\$15.00	View Details
Hat with Basketball Logo	\$20.00	View Details
Hat with College Logo	\$20.00	View Details
Hat with Team Logo	\$20.00	View Details
Hat with U Logo	\$20.00	View Details

Products

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

Harvard eCommerce Products

Click on links to access product settings, items for sale, and modifiers.

Add Product Import Product Related Products

Products

Show 25 entries Search:

Name	Type	Items for Sale	Quantity	Store Category	Web
Bumper Sticker	Generic	1			
Crimson Harvard Hat	Generic	2			
Digital Format - User Guide	Digital	1			
Donation	Donation	1			
eCommerce Conference 2017 Registration	Generic	1	500	(Store Home Page), Conf. Registration	Enabled
eCommerce Conference 2018 Registration	Generic	1	500	Conf. Registration	Enabled

Clone 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.

Products Cont.

Adding single product

Marketplace Home

- ▶ System Administration
- ▶ Athletic Classes
- ▶ Baker Library
- ▶ Dental School
- ▶ Divinity School
- ▶ GSD
- ▼ Harvard eCommerce
 - Settings
 - Accounting Codes
 - Users
 - Tax Account Codes
 - ▼ Stores
 - Add New Store
 - ▼ Harvard eCommerce
 - ▼ Store Settings
 - General
 - Status Management
 - Email Messages
 - Text Messages
 - Single Store
 - Store Template Setup **NEW!**
 - Users
 - Payment Methods
 - Shipping Classes
 - Categories
 - Products**
 - Allowed Groups
 - Group Payment Methods
 - Promotions
 - User Modifiers
 - Tax Service

Add Product Print Page

Product creation settings. Payment methods are configured for the host system account in Payment Gateway.

[Back To Products](#)

Product Settings

Product Name: (200 chars max)	<input type="text"/>
Short Description: (500 chars max) (HTML Allowed)	<input type="text"/>
Long Description: (30,000 chars max) (HTML Allowed)	<input type="text"/>
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

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.

Products Cont.

Adding a single product

The screenshot shows the 'Umbrella : Add Product' page. On the left is a sidebar menu with categories like 'Marketplace Home', 'System Administration', 'Athletic Classes', 'Baker Library', 'Dental School', 'Divinity School', 'GSD', 'Harvard eCommerce', 'Settings', 'Accounting Codes', 'Users', 'Tax Account Codes', 'Stores', 'Add New Store', 'Harvard eCommerce', 'Store Settings', 'General', 'Status Management', 'Email Messages', 'Text Messages', 'Single Store', 'Store Template Setup', 'Users', 'Payment Methods', 'Shipping Classes', 'Categories', 'Products', and 'Allowed Groups'. The 'Products' item is selected. The main content area is titled 'Umbrella : Add Product' and includes a 'Print Page' link. Below the title is a yellow box with the text: 'Set miscellaneous settings for the product. Settings can be edited after product creation.' A 'Back To Products' button is located below this box. The 'Miscellaneous Settings' section contains several fields: 'Shipping Class' (dropdown menu with 'Merchandise' selected), 'Tax Class' (dropdown menu with 'default tax rate' selected), 'Accounting Code' (dropdown menu with 'Branded Items' selected), 'Override Accounting Code' (empty dropdown menu), 'Special Authorization Question and Answer limit customers with product purchasing power.' (checkboxes for 'Yes' and 'No', with 'Yes' selected), 'Special Authorization Question' (text input with 'Authorization Code'), 'Special Authorization Answer' (text input with '123'), and 'Shipping/Handling message' (text input with 'Special instructions:'). Red arrows point from text boxes on the right to these specific fields.

Umbrella : Add Product Print Page

Set miscellaneous settings for the product. Settings can be edited after product creation.

[Back To Products](#)

Miscellaneous Settings

Shipping Class: Merchandise

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: Branded Items

Override Accounting Code:

Special Authorization Question and Answer limit customers with product purchasing power.

Special Authorization is required to purchase product: ☒ Yes ☐ No

Special Authorization Question: Authorization Code

Special Authorization Answer: 123

Shipping/Handling message: Special instructions:

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

▼ Harvard eCommerce

- Settings
- Accounting Codes
- Users
- Tax Account Codes
- ▼ Stores
- Add New Store
- ▼ Harvard eCommerce
- ▼ Store Settings
- General
- Status Management
- Email Messages
- Text Messages
- Single Store
- Store Template Setup **NEW!**
- Users
- Payment Methods
- Shipping Classes
- Categories
- **Products**
- Allowed Groups
- Group Payment Methods
- Promotions
- User Modifiers
- Tax Service
- Tax Account Codes
- Order Search
- GL Exceptions (1)
- uPay Sites
- Harvard Library
- HMS-Vanderbilt Hall
- Kennedy School
- TEST Alumni Assoc
- TEST MEM
- TEST Merchandise
- TEST Merchant
- Marketplace Reports
- Marketplace Exceptions
- Edit My Profile
- Help

Item for Sale Settings

Item for Sale	Id
Umbrella	Set with confirmation
Price is in USD (\$)	
Price:	<input type="text" value="19.99"/>
Stock Number (Maximum characters 30):	<input type="text" value="2832738"/>
<input type="button" value="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"/> Disable this product when inventory reaches zero <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></div>
Low Inventory Notification:	<input type="radio"/> Yes, Low Inventory Notification Quantity: <input type="text"/> <input checked="" type="radio"/> No
Back Orderable:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Auto Fulfill:	<input checked="" type="radio"/> Yes <input type="radio"/> No

Product Notification

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

Email addresses:
(500 chars 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.

Products Cont.

After product has been added you can manage the product from the **Products** screen or select the desired product to add **Options** and **Modifiers**.

Harvard eCommerce Products

Click on links to access product settings, items for sale, and modifiers.

Buttons: Add Product, Import Product, Related Products

Products Table:

Show	25	entries	Search:
<input type="checkbox"/>	Name	Type	Items for Sale
<input type="checkbox"/>	Bumper Sticker	Generic	1
<input type="checkbox"/>	Digital Format - User Guide	Digital	1
<input type="checkbox"/>	Donation	Donation	1
<input type="checkbox"/>	eCommerce Conference 2018 Registration	Generic	1
<input type="checkbox"/>	eCommerce Conference Gala	Generic	1
<input type="checkbox"/>	event	Generic	1

Product settings can be changed by clicking on the product name or settings gear dropdown menus.

Products Cont.

Important Product Settings: **Options** and **Modifiers** allow you to offer variations on products and gather buyer info.

▼ Marketplace Home

▶ System Administration

▶ Athletic Classes

▶ Baker Library

▶ Dental School

▶ Divinity School

▶ GSD

▼ Harvard eCommerce

Settings

Accounting Codes

Users

Tax Account Codes

▼ Stores

Add New Store

▼ Harvard eCommerce

▼ Store Settings

General

Status Management

Email Messages

Text Messages

Single Store

Store Template Setup NEW!

Users

Payment Methods

Shipping Classes

Categories


☒ Products

Allowed Groups

Group Payment Methods

Promotions

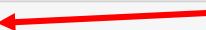
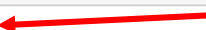
eCommerce Conference 2018 Registration: Product Settings

Print Page 

Settings on this page configure the product.

Back To Products

General Settings

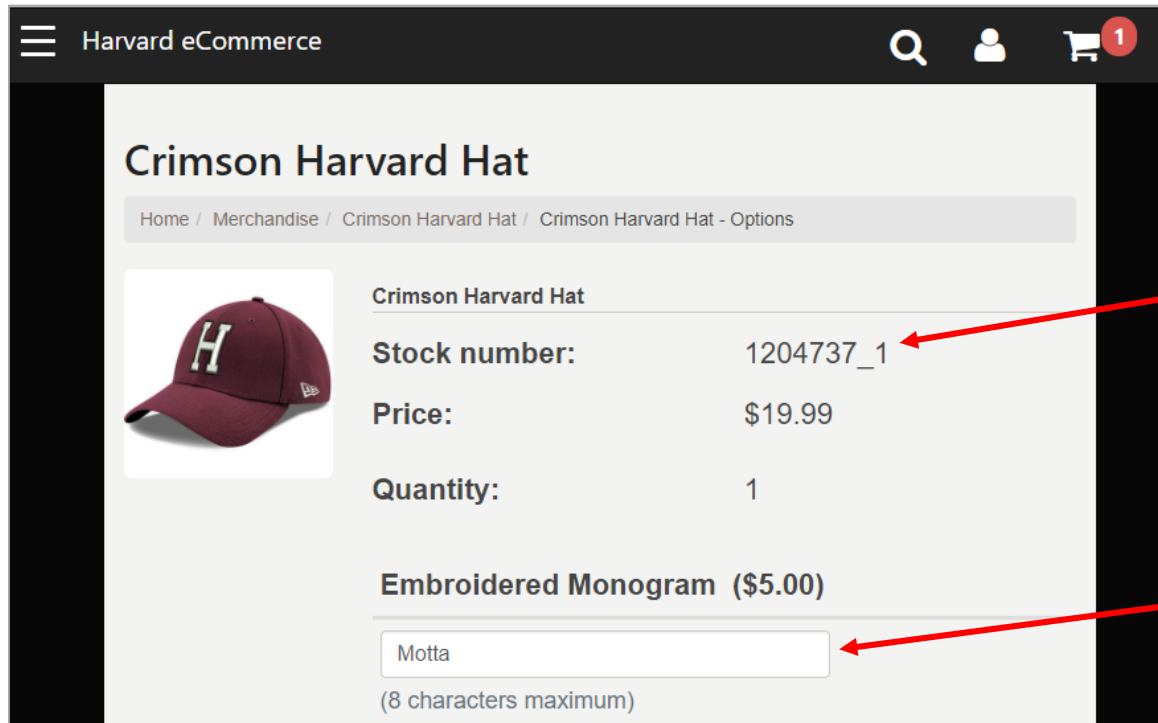
Id:	91
Type:	Generic
Name: (200 chars max)	<input type="text" value="eCommerce Conference 2018 Registration"/>
Items for Sale (1):	View Add Options 
Modifiers:	Manage Modifiers 
Attendee List:	Add List
Web status:	Enabled Manage Status

Category Settings

	Assignments	Actions
Mall Assignments:	Conferences/Events	Manage Assignments
Store Assignments:	Conf. Registration	Manage Assignments

Products Cont.

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.



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

Example of a product with both an **Option** and **Modifier**

Products Cont.

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

Accounting Codes
Users
Tax Account Codes
▼ Stores
 Add New Store
 ▼ Harvard eCommerce
 ▼ Store Settings
 General
 Status Management
 Email Messages
 Text Messages
 Single Store

Options

Select from the default options or enter a new option.

	Sort Key
<input checked="" type="checkbox"/> Size	<input type="text"/>
<input checked="" type="checkbox"/> Color	<input type="text"/>
<input type="checkbox"/> <input type="text"/>	<input type="text"/>

Accounting Codes
Users
Tax Account Codes
▼ Stores
 Add New Store
 ▼ Harvard eCommerce
 ▼ Store Settings
 General
 Status Management
 Email Messages
 Text Messages
 Single Store
 Store Template Setup **NEW!**
 Users
 Payment Methods
 Shipping Classes
 Categories
 ● **Products**
 Allowed Groups
 Group Payment Methods

Values for the option: Size (At least one value must be entered)

Value Name	Sort Key
Small	<input type="text"/>
Medium	<input type="text"/>
Large	<input type="text"/>


Values for the option: Color (At least one value must be entered)

Value Name	Sort Key
Crimson	<input type="text"/>
White	<input type="text"/>

Options as the customer sees them

Harvard Shirt

Home | Harvard eCommerce | Harvard Shirt



Price: \$25.00

Size:

Color:

Quantity:

Crimson
White

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 taken to the **Mange Modifiers** screen.

2018 eCommerce Conference: 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					

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**.

Products Cont.

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.

Marketplace Home
System Administration
Dental School
Divinity School
GSD
Harvard Athletics
Harvard eCommerce
Settings
Accounting Codes
Users
Tax Account Codes
Stores
Add New Store
Harvard eCommerce
Store Settings
General
Status Management
Email Messages
Text Messages
Single Store
Store Template Setup **NEW!**
Users
Payment Methods
Shipping Classes
Categories
Products
Allowed Groups
Group Payment Methods
Promotions
User Modifiers
Tax Service
Tax Account Codes
Order Search

2018 eCommerce Conference: 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:	First Name
Type:	<input checked="" type="radio"/> Required <input type="radio"/> Optional
Format Validation: What is this?	Free Text
Minimum Characters	1
Maximum Characters (1000 is Maximum Allowed):	25
Price Adjustment:	0
Hide Modifier In Confirmation Emails:	<input type="checkbox"/> Yes (Recommended with collecting of sensitive data)
Frequency:	<input type="radio"/> Static (Displayed once per product) <input checked="" type="radio"/> Dynamic (Repeated based on quantity purchased)

Add Modifier

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.

Drop-down Selection

Name: Affiliation

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
1. Student	-100
2. Non-Student	
3. Member - Use Promo Cod	
4.	

Price adjustments can be increased, decreased, or no change

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

***Indicates required information**

Stock number: 0088076

Price: \$300.00

Quantity: 1

*** First Name**
(1-30 character[s])

*** Last Name**
(1-30 character[s])

*** Affiliation**
Please Select
Please Select
Student (\$ -100.00)
Non-Student
Member - Use Promo Code at Checkout

Products Cont.

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

Users
Tax Account Codes
Stores
Add New Store
▼ Harvard eCommerce
▼ Store Settings
General
Status Management
Email Messages
Text Messages
Single Store
Store Template Setup **NEW!**
Users
Payment Methods
Shipping Classes
Categories
● Products
Allowed Groups
Group Payment Methods
Promotions
User Modifiers

MultiSelect Checkbox

Name: Extras

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
1. Signed Copy of Keynote Speaker's Book	25.00
2. Tote Bag	10.00
3. Coffee Mug	8.00

Add More Selections

***Indicates required information**

Stock number: 0088076
Price: \$300.00
Quantity: 1

*** First Name**
(1-30 character[s])

*** Last Name**
(1-30 character[s])

*** Affiliation**
Please Select ▼

Gala Ticket
Please Select ▼

Extras

☐ Signed Copy of Keynote Speaker's Book (\$25.00)
☐ Tote Bag (\$10.00)
☐ Coffee Mug (\$8.00)

Continue

Example of **MultiSelect Checkbox** seen by customer

Products Cont.

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**.

Users
Tax Account Codes
▼ Stores
 Add New Store
 ▼ Harvard eCommerce
 ▼ Store Settings
 General
 Status Management
 Email Messages
 Text Messages
 Single Store
 Store Template Setup **NEW!**
 Users
 Payment Methods
 Shipping Classes
 Categories
 ☒ Products

General Settings	
Id:	44
Type:	Generic
Name: (200 chars max)	2018 eCommerce Conference
Items for Sale (1):	View Add Options
Modifiers:	Manage Modifiers
Attendee List:	Add List
Web status:	Enabled Manage Status

Category Settings

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 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.

The screenshot shows the 'eCommerce Conference 2018 Registration' page. The header includes the Harvard eCommerce logo and navigation icons. The main content area is titled 'eCommerce Conference 2018 September 14th-16th Boston, MA'. It features a product image of a shopping cart with a mouse, a price of \$495.00, and a quantity of 1. Below this, there are form fields for 'Name and Affiliation' (First Name, Last Name, Affiliation) and 'Lunch Selection' (Day 1 Lunch, Day 2 Lunch, Day 3 Lunch). The 'Affiliation' dropdown menu is open, showing options: 'Select One', 'Student (\$ -100.00)', 'Non-Student', and 'Member - Use Promo Code at Checkout'. At the bottom, there is an 'Extras' section with checkboxes for 'Signed Copy of Keynote Speaker's Book - \$25 (\$25.00)', 'Tote Bag - \$9.99 (\$9.99)', 'Mug - \$9.99 (\$9.99)', and 'Pen & Notebook - \$0'.

Table View

The screenshot shows the 'eCommerce Conference 2017 Registration' page. The header includes the Harvard eCommerce logo and navigation icons. The main content area is titled 'eCommerce Conference 2017 September 14th-16th Boston, MA'. It features a product image of a shopping cart with a mouse, a price of \$495.00, and a quantity of 1. Below this, there are form fields for 'First Name' and 'Last Name'. The 'First Name' field has a dropdown menu open, showing options: 'Select One', 'Student (\$ -100.00)', 'Non-Student', and 'Member - Use Promo Code at Checkout'. The 'Last Name' field also has a dropdown menu open, showing options: 'Select One', 'Student (\$ -100.00)', 'Non-Student', and 'Member - Use Promo Code at Checkout'.

Regular View

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

<div>Settings</div> <div>Accounting Codes</div> <div>Users</div> <div>Tax Account Codes</div> <div>▼ Stores</div> <div> Add New Store</div> <div> ▼ Harvard eCommerce</div> <div> ▼ Store Settings</div> <div> General</div> <div> Status Management</div> <div> Email Messages</div> <div> Text Messages</div> <div> Single Store</div> <div> Store Template Setup NEW!</div> <div> Users</div> <div> Payment Methods</div> <div> Shipping Classes</div> <div> Categories</div> <div> ● Products</div> <div> Allowed Groups</div> <div> Group Payment Methods</div> <div> Promotions</div> <div> User Modifiers</div> <div> Tax Service</div> <div> Tax Account Codes</div> <div> Order Search</div>	Item for Sale Settings	
	Item for Sale	Id
	digital product	Set with confirmation
	Price is in USD (\$)	
	Price:	1.00
	Stock Number (Maximum characters 30):	3304808
	<div>Assign Random Stock #</div>	
	<input checked="" type="checkbox"/> Check to see if stock number is already used	
	Upload product file:	Select file for upload
	Limit Order Quantity:	<input type="radio"/> Yes, Maximum Order Quantity: <input type="text"/> <input checked="" type="radio"/> No
	Limit Downloads:	<input checked="" type="radio"/> Yes, Maximum Downloads: <input type="text"/> <input type="radio"/> No
	Limit Time For Download:	<input type="radio"/> Yes, Maximum Time Limit in days: <input type="text"/> <input checked="" type="radio"/> No
	Auto Fulfill:	<input checked="" type="radio"/> Yes <input type="radio"/> No

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.

Product Settings

Product Name: (200 chars max)	<input type="text" value="Invoice Payment"/>
Short Description: (500 chars max) (HTML Allowed)	<input type="text" value="Pay Invoice"/>
Long Description: (30,000 chars max) (HTML Allowed)	<input type="text" value="Pay Invoice"/>
Product Type	<input type="radio"/> Generic <input type="radio"/> Digital <input checked="" 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

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.

▼ Marketplace Home

- ▶ System Administration
- ▶ Athletic Classes
- ▶ Baker Library
- ▶ Dental School
- ▶ Divinity School
- ▶ GSD

▼ Harvard eCommerce

- Settings
 - Accounting Codes
 - Users
 - Tax Account Codes
- ▼ Stores
 - Add New Store
 - ▼ Harvard eCommerce
 - ▼ Store Settings
 - General
 - Status Management
 - Email Messages
 - Text Messages
 - Single Store
 - Store Template Setup **NEW!**
 - Users
 - Payment Methods
 - Shipping Classes
 - **Categories**

Harvard eCommerce Categories

Print Page

Add top level categories. Edit or add sub categories to current store categories.

Category removed.

Add Top-Level Category

Manage Category List

Product Categories

Show 10 ▼ entries Search:

Id	Name	Products	Actions
	(Store Home Page)	0	Edit
59	Conference Registration	2	Edit Add Sub-Category
60	Merchandise	4	Edit Add Sub-Category
61	Publications	2	Edit Add Sub-Category
65	Donation	4	Edit Add Sub-Category

Showing 1 to 5 of 5 entries

First Previous 1 Next Last

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.

Marketplace Home
System Administration
Athletic Classes
Baker Library
Dental School
Divinity School
GSD
Harvard eCommerce
Settings
Accounting Codes
Users
Tax Account Codes
Stores
Add New Store
Harvard eCommerce
Store Settings
General
Status Management
Email Messages
Text Messages
Single Store
Store Template Setup **NEW!**
Users
Payment Methods
Shipping Classes
Categories
Products
Allowed Groups
Group Payment Methods
Promotions
User Modifiers
Tax Service
Tax Account Codes
Order Search
GL Exceptions (1)
uPay Sites
Harvard Library
HMS-Vanderbilt Hall
Kennedy School
TEST Alumni Assoc
TEST MEM
TEST Merchandise
TEST Merchant
Marketplace Reports
Marketplace Exceptions
Edit My Profile
Help

Add Store Promotion

Print Page

Promotions will not apply to package products. 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: 30SALE

Name of Promotion: 30% Off Everything

Promotion Description: 30% Off Everything

Promotion Discount

Promotion Type: Percentage Off Per Item

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: 30

Promotion Usage

From: 11/28/17 To: 1/1/18

Can a customer use this promotion code more than once? ☐ Yes ☒ No

Maximum number of times this promotion code can be used by all users: 100

Promotion Email

Email Addresses Receiving Promotion: martha_mcewan@harvard.edu;mem2413@yahoo.com

Delimiter used to separate Email Addresses: ;

☒ Send Email to specified Email Addresses:

[Create Promotion](#)

Order Summary

Item Total:	\$62.97
Promo discount:	-\$18.90
Delivery Charge:	\$4.99
Tax:	\$0.00
Total:	\$49.06

Delivery Address

Martha Mcewan
1033 Mass ave
cambridge, MA 02138-0000
United States

[Change Delivery Address](#)

Promotional Code

Promotional Code:

(You can use one code per Cart.)

[Apply](#)

✓ Applied Promotion: "30SALE"

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.

Marketplace Home

- System Administration
- Athletic Classes
- Baker Library
- Dental School
- Divinity School
- GSD
- Harvard eCommerce
 - Settings
 - Accounting Codes
 - Users
 - Tax Account Codes
 - Stores
 - Add New Store
 - Harvard eCommerce
 - Store Settings
 - General
 - Status Management
 - Email Messages
 - Text Messages
 - Single Store
 - Store Template Setup NEW!
 - Users
 - Payment Methods
 - Shipping Classes
 - Categories
 - Products
 - Allowed Groups
 - Group Payment Methods
 - Promotions
 - User Modifiers**

Harvard eCommerce User Modifiers

Print Page

Modifiers can be configured for information collection about the buyer.

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

Current Modifiers

Name	Sort Key	Type	Format What is this?	Actions
My user modifier would appear here	<input type="text"/>	Required Drop-Down Selection	N/A	Edit Remove

[Save Sort](#)

Harvard eCommerce

Home / Cart / Additional Items / Delivery Methods / Address / Payment Methods / Buyer Information / Review / Receipt

Buyer Information

Harvard eCommerce Buyer Information

Please enter the Buyer Information requested for Harvard eCommerce.

*Indicates required information

My user modifier would appear here *

Please Select

[Review Order](#)

Order Summary	Delivery Address	Promotional Code
Item \$19.99 Total:	martha m 1033 Mass Ave	Promotional Code:

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