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TouchNet Marketplace

General User Guide

May 2024

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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 8.9 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
E-mail:	CustomerCare@touchnet.com
Web site:	clientcommunity.touchnet.com
Address:	TouchNet Information Systems, Inc. 9801 Renner Blvd., Ste. 150 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.

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The TouchNet Customer Care team for U.Commerce products is available 24/7 with live person support.

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What's New in Marketplace 8 Feature Pack 10

The following ***enhancements***are introduced in Marketplace 8.10:

ADDED FUNCTIONALITY FOR MODIFIERS VALUES

- Drag-and-drop functionality has been added to drop-down select and multiselect modifiers in the Operations Center so that administrators can list the modifiers in any order for sorting purposes.

PRODUCT NAME ADDED TO DONATION SUBJECT LINE

- The product name will now be used in the Donation email subject line instead of the word "Donation".

REMOVING ALL ROLES IN ONE PLACE

- Administrators can now remove all Marketplace roles from a user in the Operations Center instead of going to several different screens and removing roles one-by-one.

RENAMED BUTTON ON FULFILL ORDERS PAGE

- The "Process Fulfillments" button on the Fulfill Orders pages has been renamed to "Next" to minimize confusion.

ABILITY TO SCHEDULE PRODUCT STATUS CHANGES FOR WEB AND POINT-OF-SALE SIMULTANEOUSLY

- A new "Both Web and POS" option has been added to the Schedule Status Change page to allow users to schedule status for both Web and Point-of-Sale.

"SHOW STOCK NUMBER TO SHOPPERS" VALUE SET TO NO FOR NEW PRODUCTS

- The Show stock number to shoppers setting will be defaulted to No for new product creation. The setting can still be changed during product creation to Yes if the administrator so desires.

SHOW QUANTITY PROMPT

- Updated code to show that the product level Show Quantity prompt is used to determine if the customer can/should adjust the quantity on the product and category pages. (TMS-17079 SF# 350633)

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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.

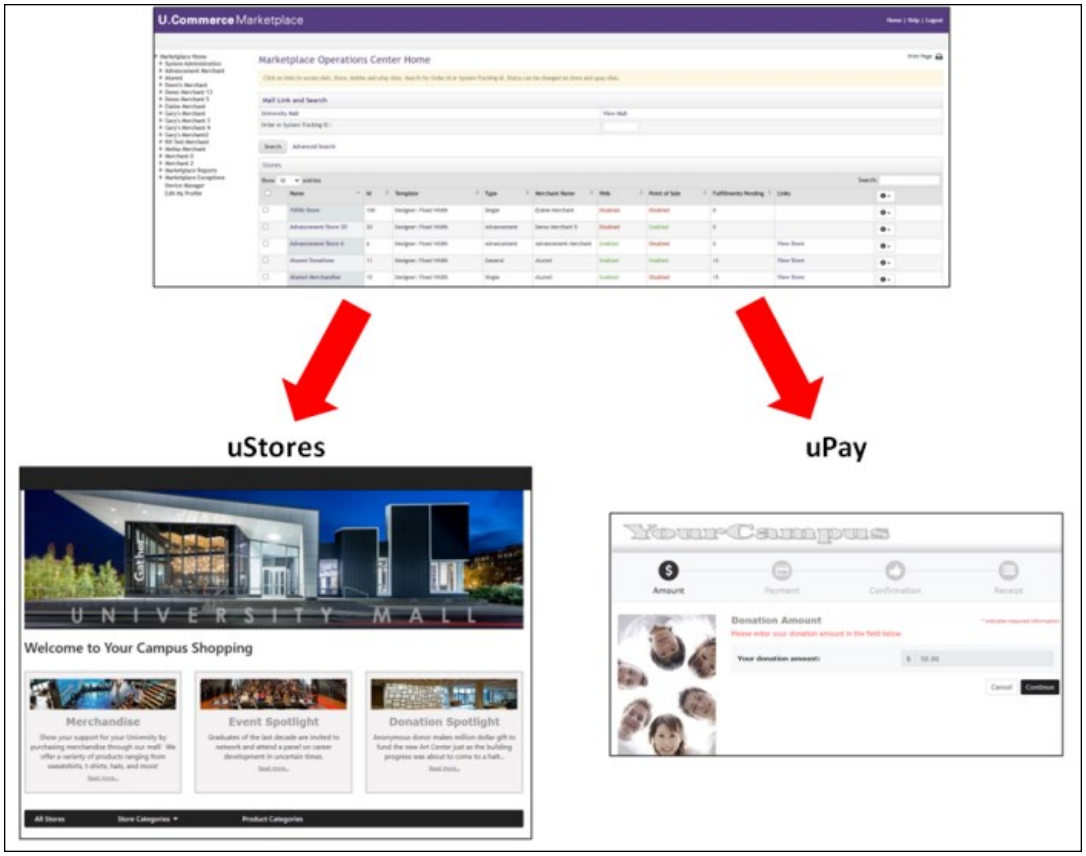
TouchNet Marketplace is a self-contained e-commerce solution, combining online storefronts with inventory control, order fulfillment, and financial reporting.

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.

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

Browser Recommendations for Marketplace

TouchNet recommends using Google Chrome, Firefox, Safari, or Microsoft Edge when accessing the web-based TouchNet U.Commerce suite of products and services. These browsers are all supported for the current version and one previous version. Users may experience connectivity and performance issues when using Internet Explorer. TouchNet does not recommend using Internet Explorer. Please use one of the recommended browsers instead.

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.

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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 Central. Marketplace is part of U.Commerce Central. So you must first navigate to U.Commerce and login. To launch U.Commerce Central, you need the U.Commerce URL and a username and password.

Important! TouchNet recommends using Google Chrome, Firefox, Safari, or Microsoft Edge when accessing the web-based TouchNet U.Commerce suite of products and services. These browsers are all supported for the current version and one previous version. Users may experience connectivity and performance issues when using Internet Explorer. TouchNet does not recommend using Internet Explorer. Please use one of the recommended browsers instead.

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.

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).

Logging in to U.Commerce Central

With the implementation of Multi-Factor Authentication (MFA) (September 2021), when you sign into U.Commerce for the first time, you will be prompted to secure your account with MFA by adding your email and phone number. Once you have your login account set up, you will designate your authentication method (verified email, text message(SMS), or a phone call). Once you select your authentication method, we'll send you a verification code. You'll enter that code when you sign in.

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All U.Commerce users at your institution will need to verify (authenticate) during login using MFA. Students and authorized users (end-users) will NOT be required to authenticate their login credentials using MFA.

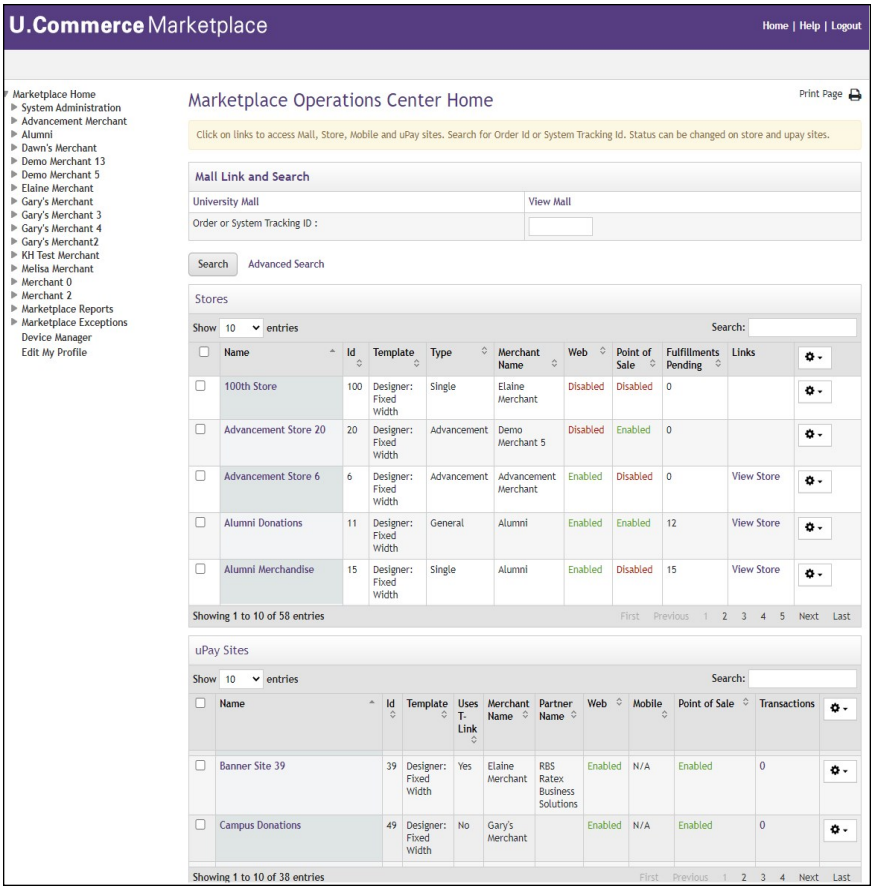
Note: MFA will be conducted only once in a 24-hour period when you log into U.Commerce. Once you've logged in and authenticated, you will not be required to re-authenticate as you log in to your other TouchNet applications (like Payment Gateway).

Please refer to the *Logging into U.Commerce Central Using MFA* section of the U.Commerce Central User Guide for the login steps.

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.



The Marketplace Operations Center Home page.

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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.

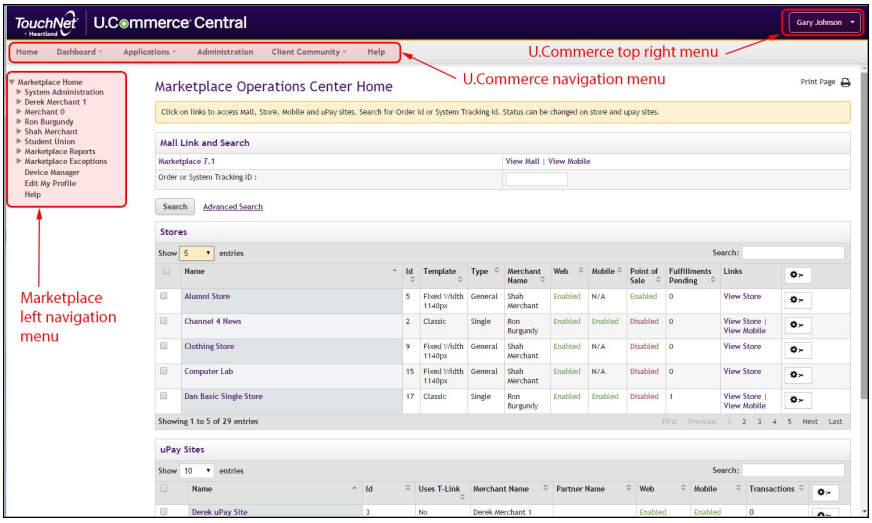
Initially, your home page contains few links and little information. However, as stores and uPay sites are created, the home page will grow in size. This page displays statistics for all the stores and uPay sites available to the user. If this is the first time you have used Marketplace and no stores 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.



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).

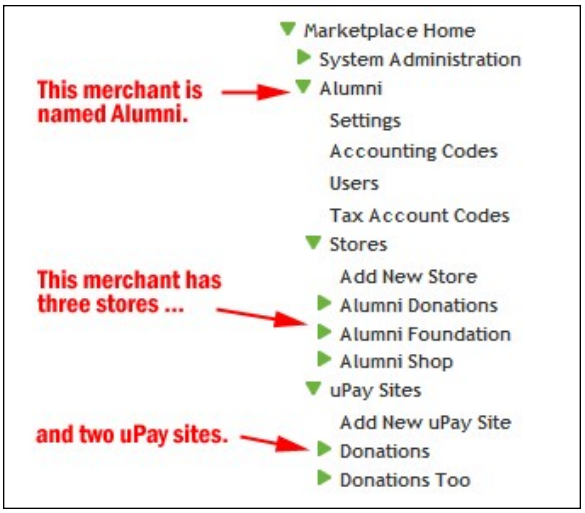
A Key Concept: Marketplace Merchant

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.

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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, 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.

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User Role	Responsibilities
Chief Administrator	• Responsible for adding additional chief administrator and administrators. (See **"Adding Administrative Users" on page 108**.) • 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. • Can copy a uStores settings and template properties to another uStore (within the same environment).
Administrator	• Responsible for creating merchants. (See **"Adding Merchant" on page 113**.) • Responsible for assigning merchant managers to merchants. (**"Adding & Editing Managers" on page 123**.) • Responsible for establishing and maintaining configuration settings that affect all Marketplace stores, including accounting codes, tax account codes, product categories, splash page images, and header images. (**"System Administration Settings" on page 35**.) • Responsible for assigning an accountant to view reports. (See **"Adding Administrative Users" on page 108**.) • Can copy a uStores settings and template properties to another uStore (within the same environment). • Can batch uPay refund payments for batch refunding.
Accountant	• Responsible for reviewing the Revenue by Merchant report. (**"Revenue by Merchant Report" on page 727**.) • Can search for orders across all stores and uPay sites.
Merchant Accountant	• Responsible for reviewing the Revenue by Merchant report. (**"Revenue by Merchant Report" on page 727**.) • Can search for orders across all stores and uPay sites.

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User Role	Responsibilities
Merchant Manager	• Responsible for managing the merchant's configuration settings, such as the wait period for ACH payments and return check fees. (**"Merchant Settings" on page 114**) • Responsible for adding stores to a merchant. (**"Adding a New Store" on page 145**.) • Responsible for assigning store managers to stores and uPay site managers to uPay sites. (See **"Adding & Editing Managers" on page 123** and **"Adding uPay Site Users" on page 575**.) • Responsible for adding uPay sites to a merchant. (**"Building a uPay® Site" on page 485**) • Can copy a uStores settings and template properties to another uStore (within the same environment.) • Can archive an existing uStore. • Can archive a uPay site.
Store Manager	• Responsible for managing store settings, such as the store images, store categories, store payment methods, and shipping rates. (**"Store Settings" on page 152**) • Responsible for assigning store clerks, a store accountant, and fulfiller users (including a fulfiller with refund/cancel rights). (**"Adding Store Users" on page 222**.) • Responsible for adding and editing products. (See **"Adding Products to a Store" on page 275**.) • Responsible for creating store promotions. (See **"Creating Promotions" on page 248**.) • Can copy a uStores settings and template properties to another uStore (within the same environment.) • Can archive an existing store.
Store Clerk	• Responsible for adding and editing products. (**"Adding Products to a Store" on page 275**.) • Responsible for moving products among categories. (See **"Managing Products in a Store" on page 296**)
Fulfiller	• Responsible for fulfilling orders. (See **"About Payment Types and Fulfillment" on page 433**.)
Fulfiller with refund/cancel rights	• Responsible for fulfilling orders as well as refunding and cancelling orders. (See **"Processing Refunds" on page 444**.)
uPay Site Manager	• Responsible for managing uPay site settings. (See **"Managing a uPay Site" on page 555**.) • Responsible for assigning payment clerks and accountants. (See **"uPay User Roles" on page 478**.) • Can archive uPay sites.

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User Role	Responsibilities
Payment Clerk	• Responsible for issuing uPay refunds. (See **"Refund a Payment" on page 1**.)
Accountant	• Responsible for viewing reports. Both stores and uPay sites can have accountants. (See **"Marketplace Reports" on page 725**.)

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	• Chief administrator • Administrator • Accountant • Merchant manager	Marketplace Home > System Administration > User Settings > Users
Administrator	• Accountant • Merchant accountant • Merchant manager	Marketplace Home > System Administration > User Settings > Users
Merchant manager	• Store manager • uPay site manager	Marketplace Home > [merchant] > Users
Store manager (and merchant manager)	• Store clerk • Fulfiller • Fulfiller with cancel/refund rights • Store accountant	Marketplace Home > [merchant] > Stores > [store] > Store Settings > Store Users
uPay site managers	• 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

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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

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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 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.

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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 payment 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. The merchant manager and uPay site manager can also archive and delete a site. 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.
- **Marketplace Exception Emails** —A user can be assigned to receive an email when Marketplace general ledger and/or posting exceptions occur. The default values upon installation will be Chief Administrators and Administrators. Updates can be made to include or exclude the Marketplace Accountant, Merchant Manager, Merchant Account and uStores or uPay Site Managers roles.

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,

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in which case the Edit Profile page may appear. In 8.5, we made several updates to the dashboard to improve speed, efficiency, and usability.

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

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.

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 22**.

Note: Accountants can use the search functionality to search for orders in all stores and uPay sites, regardless of whether they have been granted any store-specific or uPay-site specific user roles.

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.

Template

Identifies the active template selection for each store: Classic or "Designer: Fixed Width".

Note: The Designer Fixed Width template is your active template. The Classic template has been discontinued and you will have a view only option to review/reference the archived Classic template layout of the mall and stores that were migrated to the Designer template.

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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). You can change the status of stores by using the Gear column dropdown menus.

Point of Sale
This field indicates the status of the Point of Sale functionality.

Fulfillments Pending
Ths 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.

[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

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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.

Template
Identifies the active Designer: Fixed Width template selection for each uPay site.

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

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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 26**.)

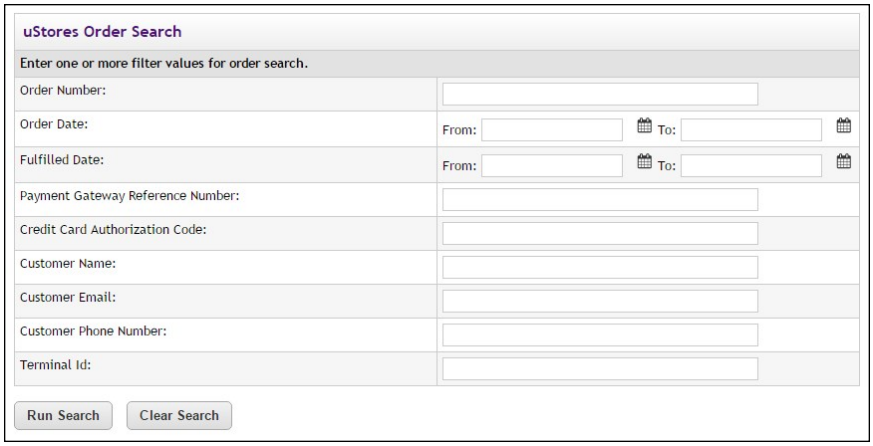
The left navigation menu give you access to those stores and uPay sites for which you have been granted a user role. If you have not been granted a user role for a store or uPay site, no corresponding link will appear in the left navigation menu.

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.

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. (However, accountants can search for orders across all stores and uPay sites, regardless of whether they have been granted a store user role or a uPay site 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.

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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 payment 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.)

Customer Phone Number

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

Terminal ID

The terminal ID for the Marketplace Point-of-Sale device that was used to process the transaction.

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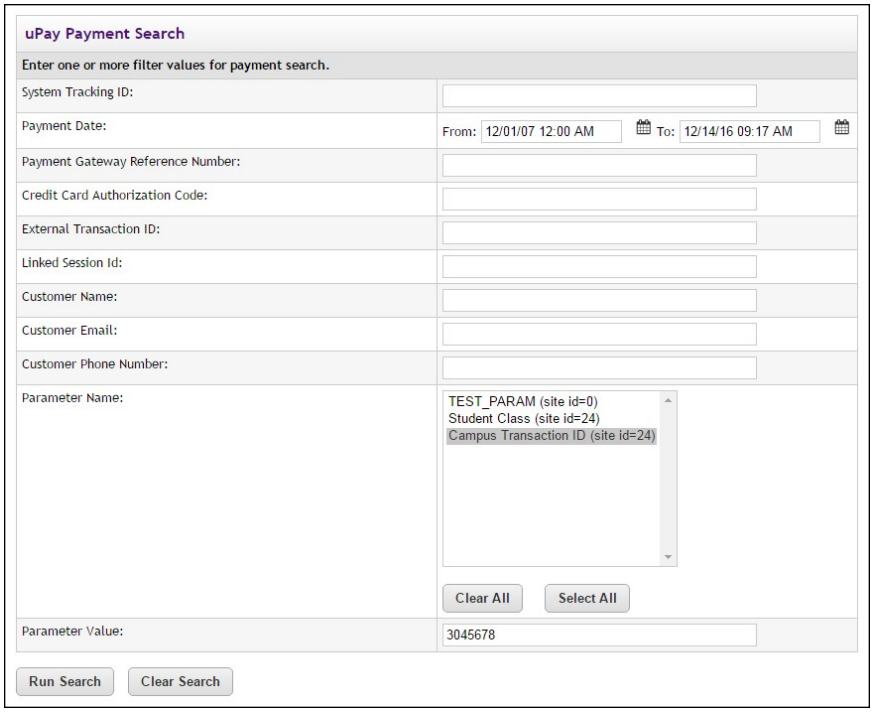
Partial Entries

You can make partial entries in the following fields: Payment Gateway Reference Number, Credit Card Authorization Code, 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.

Searching With Ancillary Data

When transactions area processed by uStores, ancillary data is passed to Payment Gateway. This data includes Sys Tracking ID and customer name. The data is labelled within the ancillary data field, so it's easy to identify. If you would like to search in Marketplace for a payment that was received in Payment Gateway, you simply enter either the Sys Tracking ID value or the customer name.

For more information about searching for uStores orders, see **"Order Search" on page 429**.



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.

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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 payment 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.)

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Parameter Name

All additional form parameters configured for all uPay sites are listed in this field. If you select one of these parameter names, all search results will have passed that parameter name. You can hold the CTRL key and click multiple items. You can also hold the SHIFT key to select a group of adjacent items.

Parameter Value

For all additional form parameters configured for all uPay sites, you can search for any specific parameter value that was passed to uPay. (For example, if the Parameter Name of CAMPUS_TRANS_ID was passed, you could search for a specific campus transaction ID, such as "345236," or if the Parameter Name of AMT was passed, you could search for a specific amount, such as "50.00."

Partial Entries

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.

Searching With Ancillary Data

When transactions area processed by uPay, ancillary data is passed to Payment Gateway. This data includes External Tracking ID and Sys Tracking ID. The data is labelled within the ancillary data field, so it's easy to identify. If you would like to search in Marketplace for a payment that was received in Payment Gateway, you simply enter either the External Tracking ID value or the Sys Tracking ID value. Ancillary data for uPay recurring payments includes only the Sys Tracking ID.

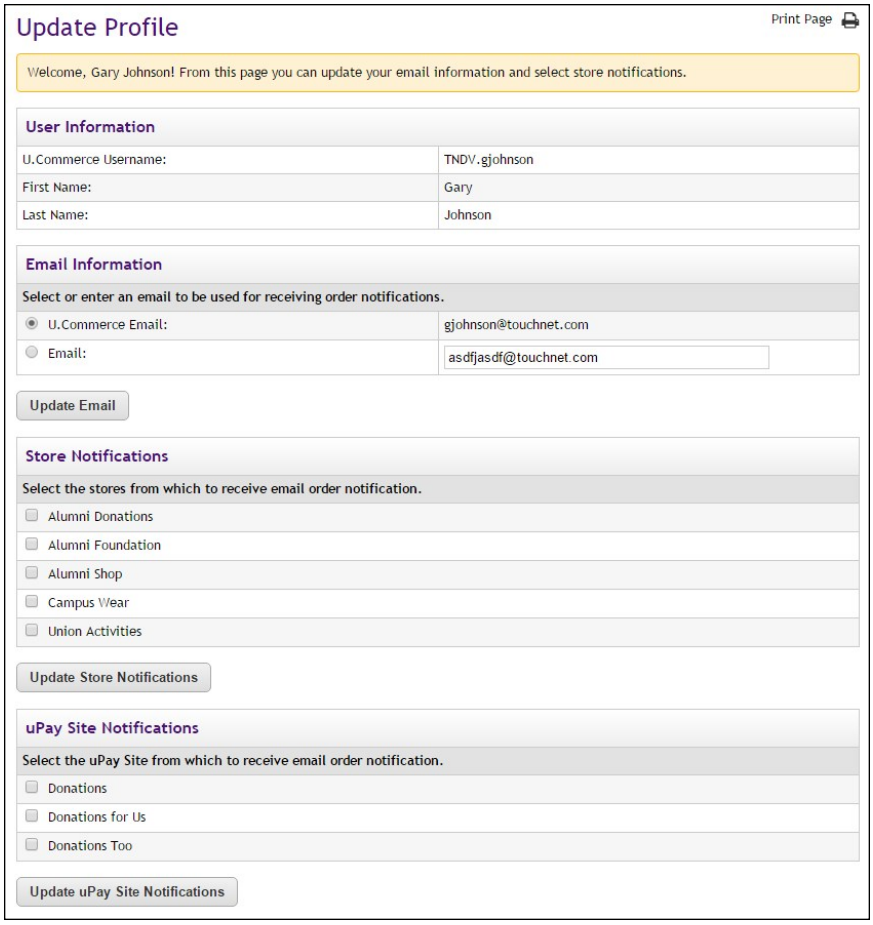
For more information about searching for uPay orders, see **"Look Up a Payment" on page 578**.

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 notification settings.

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).

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

Store Notifications

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 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 Store Notifications button.

When the e-mail notification option is turned on for a specific store, you will receive a separate e-mail message for every order. This is for eCommerce (web) orders only. It does not apply for uStores Point of Sale or uPay Point of Sale.

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uPay Site Notifications

The uPay Site Notifications section allows you to specify whether you would like to be notified when uPay payments are placed with uPay sites for which you have the role of site manager. This feature is useful when you have a uPay site with low volume and don't want to log in every day just to see if transactions were received. To be notified when a transaction takes place for a specific uPay site, simply select the checkbox beside the uPay site name and click the Update uPay Site Notifications button near the bottom of the page.

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

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Part 2:
Administrative and Merchant Setup

2.0 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.

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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 609** 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.

2.1 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.

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Planning Summary for Administrative Settings

Shopping Site Basics	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	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	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	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.)

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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.

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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. Should payment 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?

2.2 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.

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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.

Complete the following fields:

General Settings

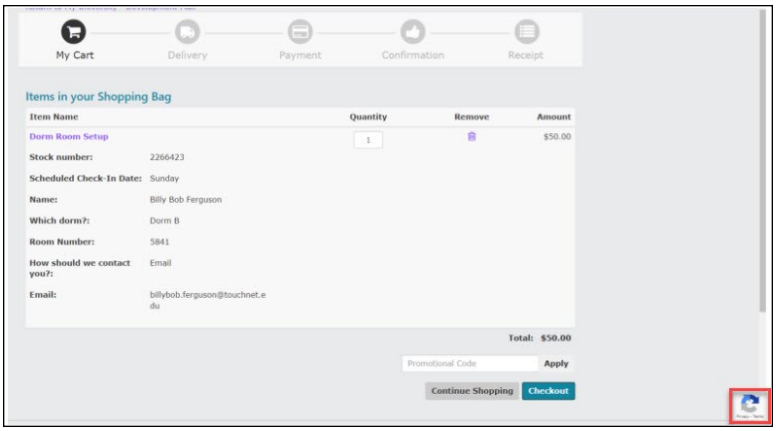
Store Mall Name
Buyers see this name in the automatically generated order confirmation e-mail and in the online "Thank you for shopping" message.

Administrative Settings

Google reCAPTCHA protection level
This feature replaces the existing Visual CAPTCHA experience with an invisible version of Google reCAPTCHA. Schools will no longer need to enable CAPTCHA per product and the CAPTCHA widget will no longer appear when adding the product to cart. Instead, a proprietary algorithm maintained by Google reCAPTCHA will be applied to every cart at checkout. This algorithm supplies a risk assessment score to indicate how likely the shopper is a human and not a robot.

If the shopper's behavior is not suspicious (human-link) Google reCAPTCHA will supply a higher assessment score and therefore the shopper will be able to complete a checkout without any intervention. The most the shopper will see is a Google reCAPTCHA icon on the checkout pages.

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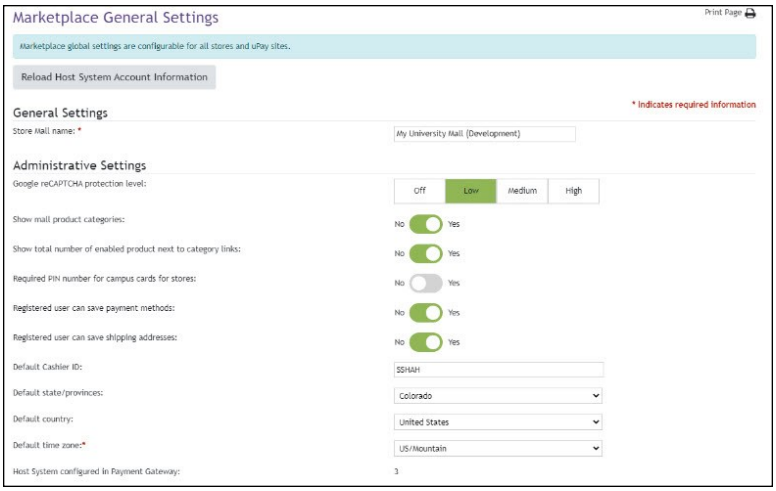
If the shopper's behavior is suspicious (robot-like) Google reCAPTCHA will supply a lower assessment score and the shopper will be alerted via an error message. The shopper will not be able to continue with the checkout.

Marketplace Operations Center has been updated to allow each school greater control over their reCAPTCHA risk assessment levels for uPay and uStores. Chief Administrators and Administrators will be able to maintain the level of protection they will accept via the System Administration > Settings > General menu. Google reCAPTCHA supplied risk assessment scores are highest when the shopper behavior is human-like and lowest when the shopper behavior is robot-like.

The protection level settings are:

- **Off** - Google reCAPTCHA will evaluate each transaction but all payments will be accepted, regardless of the risk assessment Google reCAPTCHA supplies.
- **Low** - Google reCAPTCHA will evaluate each transaction and only those transactions with the lowest assessment value supplied by Google reCAPTCHA will be stopped. This is the lowest level of security (next to turning reCAPTCHA off).
- **Medium** - Google reCAPTCHA will evaluate each transaction and those transitions with a low to medium risk assessment value supplied by Google reCAPTCHA will be stopped. This is a medium level of security (recommended by Google reCAPTCHA).
- **High** - Google reCAPTCHA will evaluate each transaction and only those transactions with highest likelihood of being human-like will process, erring all other transactions. This is the highest level of security.

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The default setting will be **Low** for all schools once Feature Pack 8.6 installs.

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 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 payment card number and expiration date under the payment method name "My Credit Card."

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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.

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 619**.

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. Be sure you choose a time zone that is appropriate for the business location. The value that you select will be used as the default time zone for all stores, although a different time zone can be selected for each store.

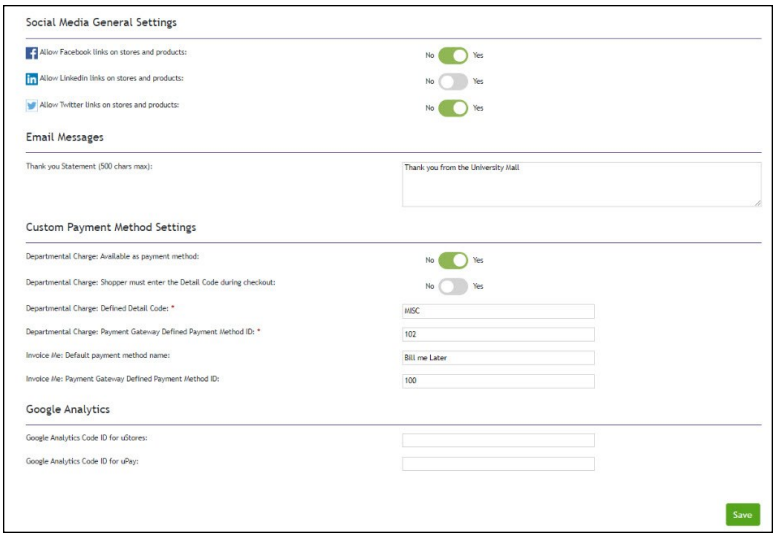
Host system configured in Payment Gateway

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

Social Media General Settings

This section allows the administrator to allow Facebook, LinkedIn and/or Twitter to link to the store.

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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.

You can configure your Contact Us email address when setting up your store template. To configure, navigate to Store Template Setup under Store Settings. In Store Template Setup, within the Manage Your Store Footer section, add your Contact Us email address. Be sure to select the "On" option if you would like to enable this feature.

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 is the default Thank You Statement for the uStores mall. Separate Thank You Statements can be configured for each store (as described in

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"Email Messages for Stores" on page 171). If an order is placed at a store and a thank you statement has not been configured for the store, then the default Thank You Statement for the uStores mall is used.

Characters entered in this field will appear as text in e-mail messages. The Thank You Statement appears immediately below the message heading as part of order confirmation messages, fulfillment e-mail notifications, order cancellation e-mail notifications, and refund confirmations.(500 characters max.)

Note: When using this field, keep in mind the text you enter in this field may be used with any store—and with all four message types described above—so you should avoid entering any text in this field that is only relevant for an individual store or for a single type of message.

This text contains the default terms and conditions to which ACH payers must agree when making purchases from uStores sites.

Departmental Charge

For Banner by Ellucian customers, fields for Departmental Charge appear. For information about these fields, see "Using Departmental Charges" on page 635.

Invoice Me

Alternate name for Invoice Me payment method

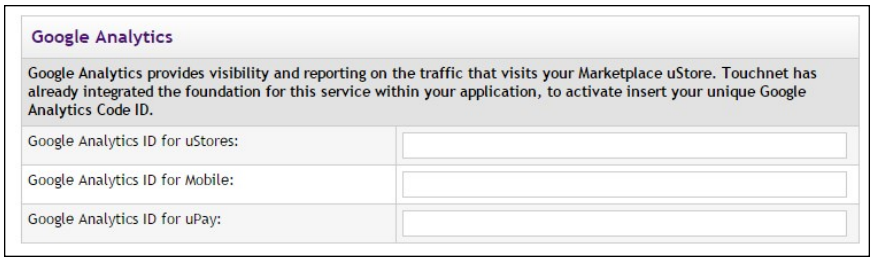
You can modify how the name of the Invoice Me payment method is displayed to customers by entering text in this field.

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.

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Google Analytics



Google Analytics ID for uStores

After you have opened a Google Analytics account, you can enter the Google Tracking ID in this field. Once you have established Google Analytics integration, each time a customer views a uStores page, information about that web page is then sent to Google Analytics. (Information is not sent to Google Analytics for any uStores page that may contain bank account information or payment card information.)

Note: Site traffic information is combined for all stores for each unique web page in uStores.

Google Analytics ID for Mobile

In addition to the Google Analytics ID for uStores, you can also configure a Google Analytics ID for Mobile so that traffic is reported for both uStores and Mobile.

Google Analytics ID for uPay

This field allows you to configure a Google Analytics ID for uPay so that traffic for all your uPay sites is reported.

QR Codes

The QR Code Management section allows you to generate a QR code that can be downloaded for use on printed material. The QR code represents a URL for the uStores mall home page. The QR code can be used in printed material, such as a magazine or a sign or product packaging or a business card or almost any object about which users might need information. The main use of QR codes comes in smart phone applications that use a camera to photograph the QR code. The application interprets the QR code and links to the targeted web page by opening a web browser installed on the smart phone.

Note: The QR Code Management section of the Administrative General Settings page only appears if Mobile Marketplace has been licensed.

To generate and download a QR code, follow these instructions:

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1. In the left navigation menu, go to Marketplace Home > System Administration > Settings > General. The Administrative General Settings page appears.
2. Scroll to the bottom of the page so that the QR Code Management section is visible.



3. Choose Small, Medium, or Large from the Code Size dropdown menu.
   - Small—Size: 250 pixels wide by 250 pixels high.
   - Medium—Size: 350 pixels wide by 350 pixels high.
   - Large—Size: 550 pixels wide by 550 pixels high.
4. Choose png, pdf, jpeg, gif, or bmp from the File Type dropdown menu.
5. Choose the Create Image button.

   The QR Code image then appears in the Image box.

   Note: The URL associated with the QR Code appears in the Embedded URL field.
6. Choose the Download Image button to initiate the download of the image.
7. Save the file to the location of your choice.

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.

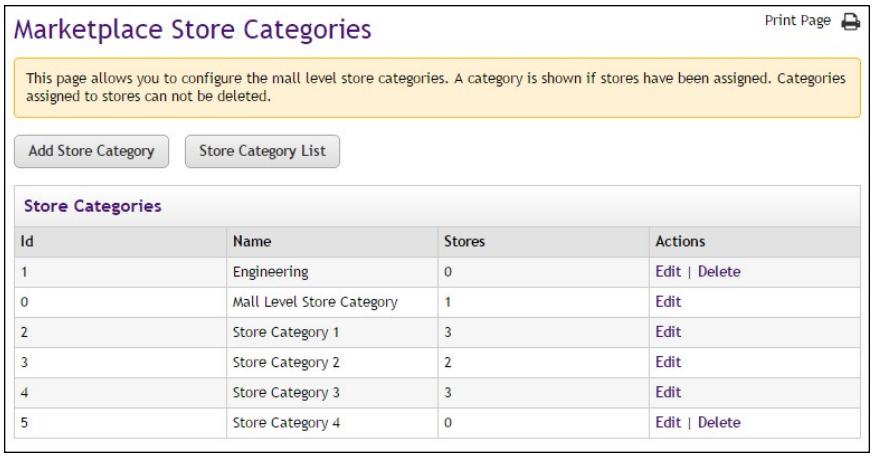
Store categories are created by administrators. Administrators name and manage these categories. Store categories work well for grouping all the stores created by a campus department or organization. For example, an alumni group may have several stores, and this group may wish for their stores to be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

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

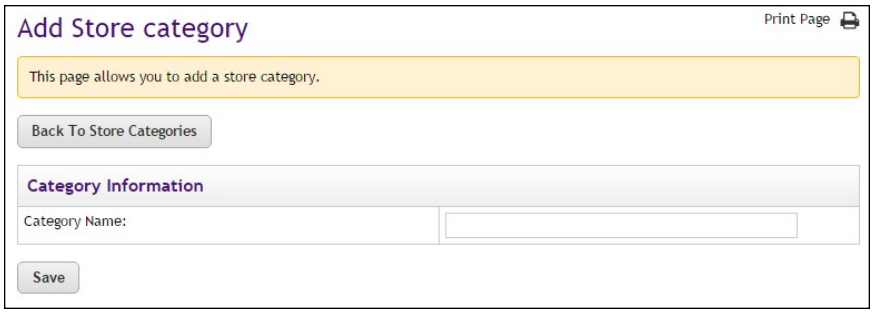
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1 Navigate to Marketplace Home > System Administration > Settings > Store Categories. The Store Categories page opens.



The Store Categories page

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



The Add Store Category page.

3 Enter a name for the store category.

4 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 152**.

Store Category Tips

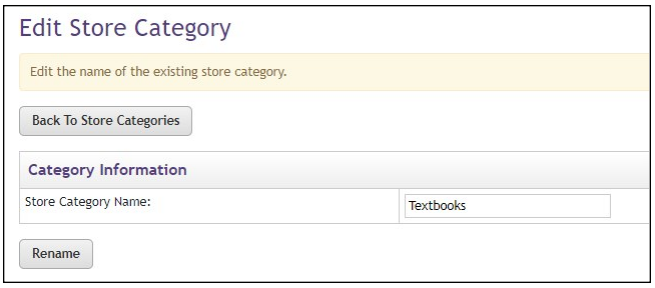
- Check with store managers to hear what store categories would help them most. Also, tell store managers when new store categories are added or changed so they can make sure stores are in the right categories.
- If a category is empty, shoppers won't see its link in the site. You can add empty categories while you are figuring out the best structure for your site, and then remove unused categories later.

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- 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.



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.

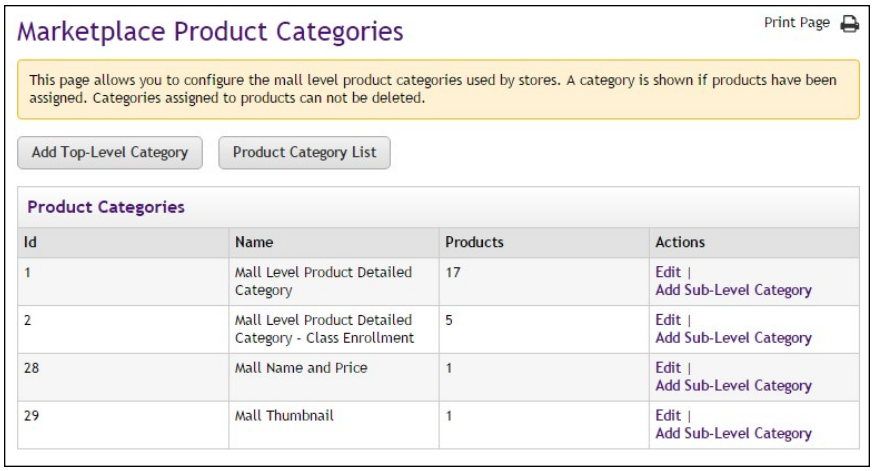
These categories are accessed via the Product Categories link in the Tab NavBar of the mall home page and in the Curtain Navigation menu on the mall and store home pages.

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

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

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



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.

- **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.

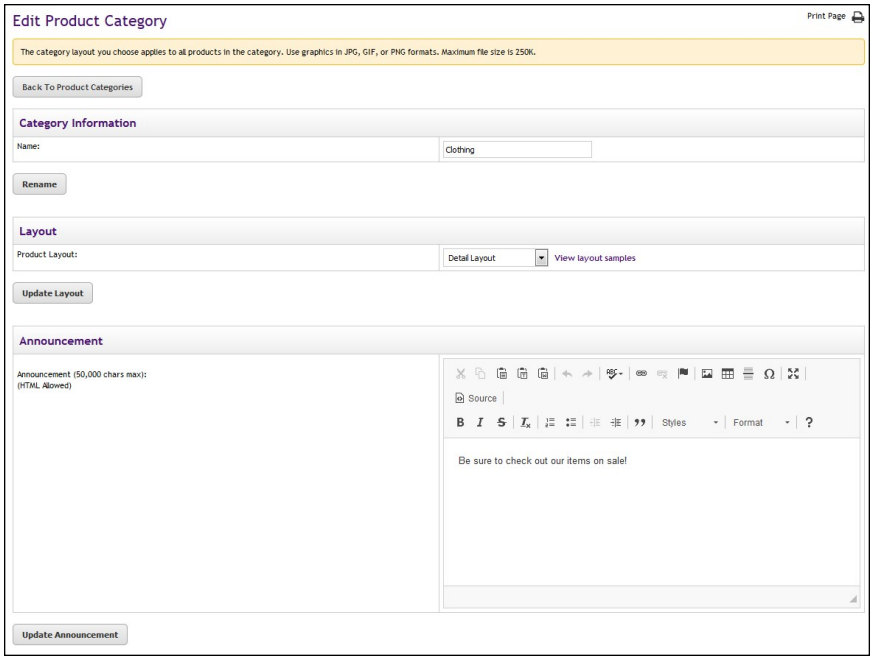
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- **Detailed Layout**. The shopper sees product thumbnail images, short descriptions, names, and prices. This layout works well for categories that don't contain many products, or when you want to quickly advertise more information about the products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



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

Note: For sub-categories, the Parent Category field also appears on this page.

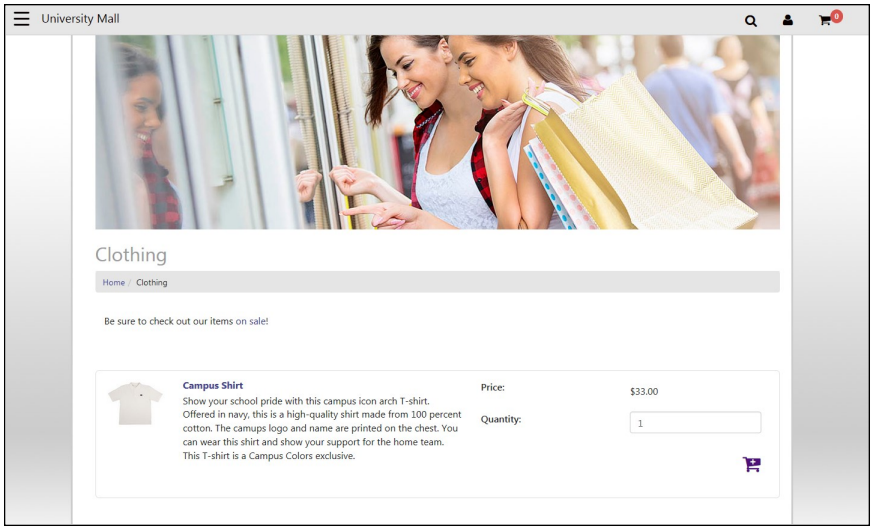
3. You can edit the **Name** of the category.
4. You can select a **Product Layout** for the category.
5. You can enter an **Announcement** for the category.
6. You can upload **Images** for this category. Images include Mall Hero Image and Mall Tile Image. If you would like to add an image, select the Upload button for the corresponding image type.

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Uploading a Hero Image

A hero image can be added to the product category page. This image appears below the Global Navbar at the top of the page. This image can be used as the focal point for the page.



A Mall Storefront Tile Image can be uploaded for each store. This image will display in the Category Link Display of the mall home page.

The hero image can be uploaded by selecting the Upload Hero Image button. Recommended size for the hero image: 1140 pixels wide by 320 pixels high.

Uploading a Mall Tile Image

The Mall Tile Image can appear as part of the product category tile in the lower portion of the mall home page. This area is called the Category Link

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Display. Each tile in the category display may optionally display a store image.

The tile image for a store can be uploaded by selecting the Upload Mall Tile Image button. Recommended size for the mall tile image: 190 pixels wide by 90 pixels high.

Adding an Announcement

The Announcement field includes a large text entry area and a toolbar with various buttons that can be used for adding formatting. You can use the buttons to add styling, images, tables, horizontal lines, hyperlinks, numbered lists, bulleted lists, or block quotes.

Note: When you select the image button, you will be asked for the URL for the image. This URL can reference an image on an external server, or it can point at an image that you have uploaded for use with Marketplace. See **"Mall Product Categories" on page 45** for more information about URLs/paths.

You can use the Source button to view the HTML code that will be used with the Enter Custom Content field. You can edit this HTML or add new HTML.

When you select the Save button, a validation process takes place. Any HTML 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 entry in the Enter Custom Content field. We recommend you become proficient in authoring HTML before you attempt to enter HTML is this field.

For more information about the allowed HTML code, see the *Security Validation Guide*.

The HTML that you enter can reference images. You can upload images by using the Images tab of the Designer template. Any HTML entered in the Custom Content field can utilize CSS that has been added to a style sheet via the **Enter Custom Content** field.

The Enter Custom Content field accepts up to 50,000 characters.

Image Specifications

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

- You can only use GIF, JPG, or PNG format images.
- All images must have file sizes of 250K or less.

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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.

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 Marketplace mall in your web browser and then open the category page that you wish to link to. Copy the URL displayed in your browser's address field.

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QR Codes

The QR Code Management section allows you to generate a QR code that can be downloaded for use on printed material. The QR code represents a URL for a mall-level product category page. The QR code can be used in printed material, such as a magazine or a sign or product packaging or a business card or almost any object about which users might need information. The main use of QR codes comes in smart phone applications that use a camera to photograph the QR code. The application interprets the QR code and links to the targeted web page by opening a web browser installed on the smart phone.

Note: The QR Code Management section of the Mall Categories page only appears if Mobile Marketplace has been licensed.

To generate and download a QR code, follow these instructions:

1. In the left navigation menu, go to Marketplace Home > System Administration > Settings > Product Categories. The Mall Categories page appears.
2. Select the Edit link for one of the Category names.

   The Edit Category Settings page appears.
3. Scroll to the bottom of the page so that the QR Code Management section is visible.



4. Choose Small, Medium, or Large from the Code Size dropdown menu.
   - Small—Size: 250 pixels wide by 250 pixels high.
   - Medium—Size: 350 pixels wide by 350 pixels high.
   - Large—Size: 550 pixels wide by 550 pixels high.

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5 Choose png, pdf, jpeg, gif, or bmp from the File Type dropdown menu.

6 Choose the Create Image button.

The QR Code image then appears in the Image box.

Note: The URL associated with the QR Code appears in the Embedded URL field.

7 Choose the Download Image button to initiate the download of the image.

8 Save the file to the location of your choice.

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.

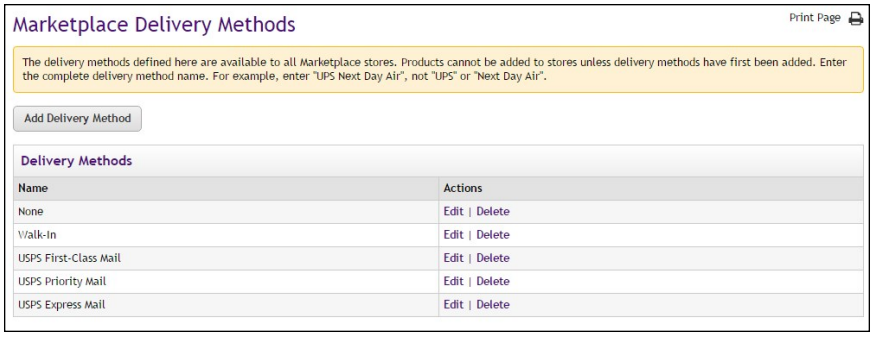
Using the uStores Delivery Methods Page

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.

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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.

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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.

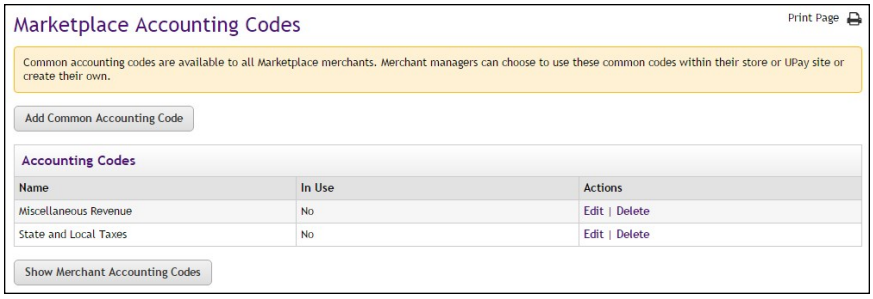
For instance, administrators can create accounting codes for each tax class. This will allow you to transfer tax revenue information to the general ledger system.

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.



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

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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

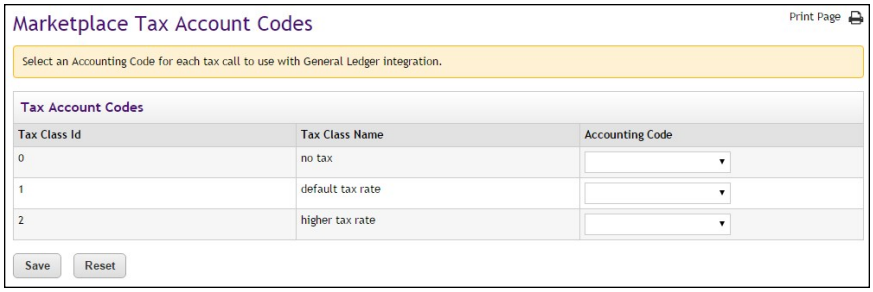
Tax classes determine the tax rates charged for products and shipping. If you use general ledger options, each tax class can be assigned one of the accounting codes you have created. This accounting code is used to transfer tax revenue information to the general ledger system.

The available accounting codes are set up in the Accounting Codes options. (See **"Accounting Codes" on page 54**.) For other details on accounting codes, see **"General Ledger Information" on page 609**.

To assign a tax account code:

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



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. For more about tax methods, see **"Custom Tax Rates " on page 56**.

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.

2.3 Custom Tax Rates

UPGRADE NOTE: In previous releases of Marketplace, schools could implement their own custom tax files by using the *taxrates.dat* file and the *city_county.dat* file; however, schools had to hand off these files to TouchNet for implementation in the Data Center. With Feature Pack 8, the information in these files has been converted to the Marketplace database. Schools can now maintain their custom tax rates by using the new Custom Tax Rates page in the Marketplace Operations Center.

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Marketplace offers two methods for computing taxes. Store managers have the ability to choose which tax option best meets the needs of their store: the TouchNet Tax Service or custom tax rates (that are maintained by a Marketplace administrator). If the store does not choose to use the TouchNet Tax Service, then the custom tax rates are applied. The following table describes the two tax methods and the pros and cons of these methods.

Tax Method	Pros	Cons
Custom Tax Rates: The campus maintains the data that specifies the tax rates.	• 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.	• 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. • Not available for Marketplace Point-of-Sale
TouchNet Tax Service: Marketplace utilizes a tax service that maintains the tax rate files.	• 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 than possible with Custom Tax Rates. • Available for Marketplace Point-of-Sale	• 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 Custom Tax Rates method for determining taxes—in which a Marketplace administrator is responsible for managing the tax rates. Therefore it is important that the Marketplace administrator configure the custom tax rates—or otherwise communicate with all store managers the importance of selecting the TouchNet tax service. If the administrator has not configured the tax rates and a store manager has not selected the TouchNet tax service, then no tax will be withheld for that store.

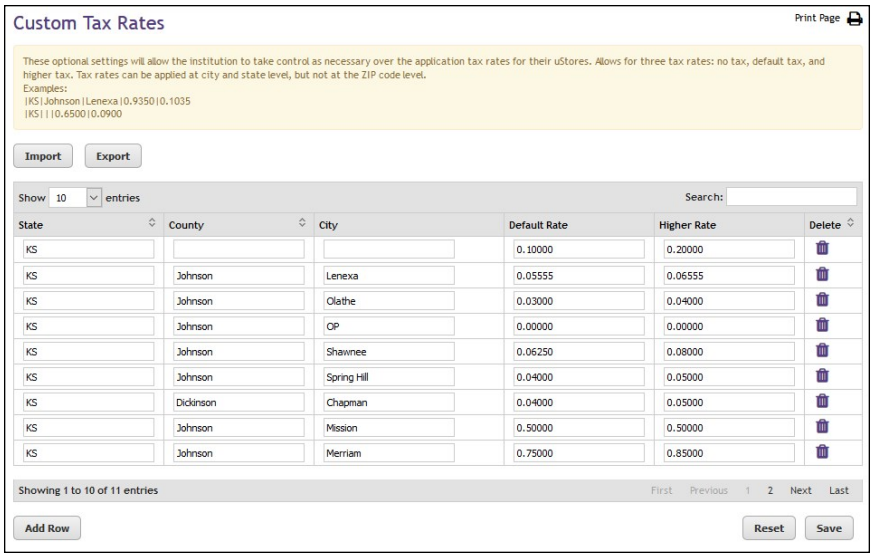
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The following instructions only apply for Custom Tax Rates. For the TouchNet tax service, the tax rates cannot be edited. For more information about the TouchNet tax service, see **"Taxes" on page 265**.

Maintaining tax rates

Tax rates can be maintained on the Custom Tax Rates page. You can navigate to this page by choosing System Administration > Settings > Custom Tax Rates.

This page lists all state|county|city jurisdictions for which an administrator has configured tax rates. For each state|county|city jurisdiction, a Default Rate and a Higher Rate can be configured.



The Custom Tax Rates page allows you to maintain tax rates.

To add a new state|county|city jurisdiction, select the Add Row button. A blank row is then added to the bottom of the custom tax rates table.

Each row must include at minimum a state. Rows may also include a county. If a county is entered, a city may also be entered. For each row in the table, you can enter a Default Rate and a Higher Rate.

Be sure to select the Save button to save your changes and additions before navigating away from this page.

You can select the trash can icon in the far right column to delete a row.

For more information about how tax rates are applied and how this may affect the configuration of your Custom Tax Rates, see "How Tax Rates Are Applied" below.

Importing tax rates

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An administrator can use the Import button on the Custom Tax Rates page to import tax rates from a text file. The import process completely replaces all the rows that were previously entered on the Custom Tax Rates page.

Each state|county|city jurisdiction must appear on a separate line in the text file.

An entry for a city should follow this format:

```
|STATE|County|City|default tax rate|higher tax rate
```

An entry for a county-wide tax rate should follow this format:

```
|STATE|County||default tax rate|higher tax rate
```

For a county-wide tax rate, leave the city field empty but include the surrounding vertical pipe characters. For important additional information about using state|county jurisdictions, see "Additional Notes on Configuring Tax Rates" below.

An entry for a state-wide tax rate should follow this format:

```
|STATE|||default tax rate|higher tax rate
```

For a state-wide tax rate, leave both the county and city fields empty but include the surrounding vertical pipe characters for these fields.

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 in both tax rate fields.

Do not add commas or any other characters at the end of each line.

For more information about how tax rates are applied and how this may affect your import file, see "How Tax Rates Are Applied" below.

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Example 1

In this example, the entire state has a default tax rate of 6.5%.

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

If the county of Albany has a different default tax rate of 7.25%, then you would add another line as follows:

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

If the city of Altamont (in Albany county) has a default tax rate of 7.75% and a higher rate of 8.5%, then you would add another line as follows:

```
|NY|Albany|Altamont|0.0775|0.085
```

So together, the three lines in the text file should look like this:

```
|NY|||0.65|0.65
|NY|Albany||0.0725|0.0725
|NY|Albany|Altamont|0.0775|0.085
```

Notice there no commas or any other characters at the ends of the lines.

Example 2

In this example, the county of Albany charges 7.5% tax as the default rate and 8% tax at the higher rate.

```
|NY|Albany||0.075|0.08
```

Notice the city name is empty but vertical pipe characters surround the city field.

If the cities of Altamont (in Albany county) and Fort Hunter (also in Albany county) use the same tax rates as configured for the county, the following lines are included:

```
|NY|Albany|Altamont||
|NY|Albany|Fort Hunter||
```

Notice the tax rate fields are empty. Vertical pipe characters surround the default tax rate fields. Do not add a final vertical pipe character at the end of the line. (Alternatively, tax rates could be included with each city, but this might require maintaining more data. Leaving the city tax rate fields blank is optional; however, be sure to configure a corresponding county in this situation.)

So altogether, the three lines in the text file should look like this:

```
|NY|Albany||0.075|0.08
|NY|Albany|Altamont||
|NY|Albany|Fort Hunter||
```

In this way, the county rates will be used when customers place orders and the shipping city is Altamount or Fort Hunter. For important additional information about using state|county jurisdictions, see "Additional Notes on Configuring Tax Rates" below.

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How Tax Rates Are Applied

When Marketplace assigns tax to an order, it uses the city that the customer has entered as part of the shipping address (or it uses the store's default address if shipping is not required). It then applies taxes according to the following hierarchy:

1. Marketplace looks for a matching state|county|city jurisdiction in the Custom Tax Rates table.
   - If city match exists WITH a tax rate, Marketplace assigns that city tax rate. **Stop.**
   - If a city match exists WITHOUT a tax rate, Marketplace will look for a state|county match in the Custom Tax Rates table. **Go to Step 2.**
   - If a city match does not exist, Marketplace will look for a state match based on the state specified by the order's shipping address. **Go to Step 3.**
2. Marketplace looks for a matching state|county jurisdiction in the Custom Tax Rates table.
   - If a county match exists WITH a tax rate, Marketplace assigns the county tax rate. **Stop.**
   - If a county match exists WITHOUT a tax rate, Marketplace will look for a state match based on the state specified by the order's shipping address. **Go to Step 3.**
   - If a county match does not exist, Marketplace will look for a state match based on the state specified by the order's shipping address. **Go to Step 3.**
3. Marketplace looks for a state match.
   - If a state match exists WITH a tax rate, Marketplace assigns that state tax rate. **Stop.**
   - If a state match exists WITHOUT a tax rate, no taxes are applied to the order. **Stop.**
   - If a state match does not exist, no taxes are applied to the order. **Stop.**

Additional Notes on Configuring Tax Rates

The following notes apply when configuring taxable jurisdictions:

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- State|county|city jurisdictions can be configured without tax rates. In this situation, the county tax rate configured with the state|county jurisdiction will be applied. If you choose to use state|county jurisdictions, be sure you configure these jurisdictions with tax rates.
- A state|county jurisdiction in the Custom Tax Rates table is only used for applying taxes if a corresponding state|county|city jurisdiction (without tax rates) has identified the applicable county.
- Use of a state|county jurisdiction may be helpful with configuring the Custom Tax Rates table if all cities in that county use the same tax rates. Otherwise, the state|county|city jurisdictions should be configured with tax rates, which likely makes the use of state|county jurisdictions irrelevant in these instances.
- Use of a state jurisdiction is typically necessary to account for any cities that may not be included in your Custom Tax Rates table. However, be sure to review your state's tax requirements to ensure that you are applying the applicable taxes and update the Custom Tax Rates table as necessary.

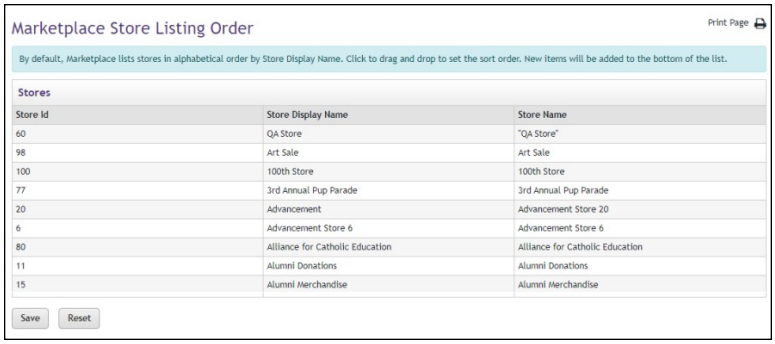
Important! Marketplace uses information in the Custom Tax Rates table to determine the county for each city. Marketplace does not otherwise have information that identifies the county/city matches. Therefore, TouchNet strongly recommends the Custom Tax Rates table be configured with a complete list of all state|county|city jurisdictions in which taxes should be applied.

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.



2. By default, the stores are listed in alphabetical order. To change the order a store is listed, click on the desired store and drag and drop it to the desired order in the list.

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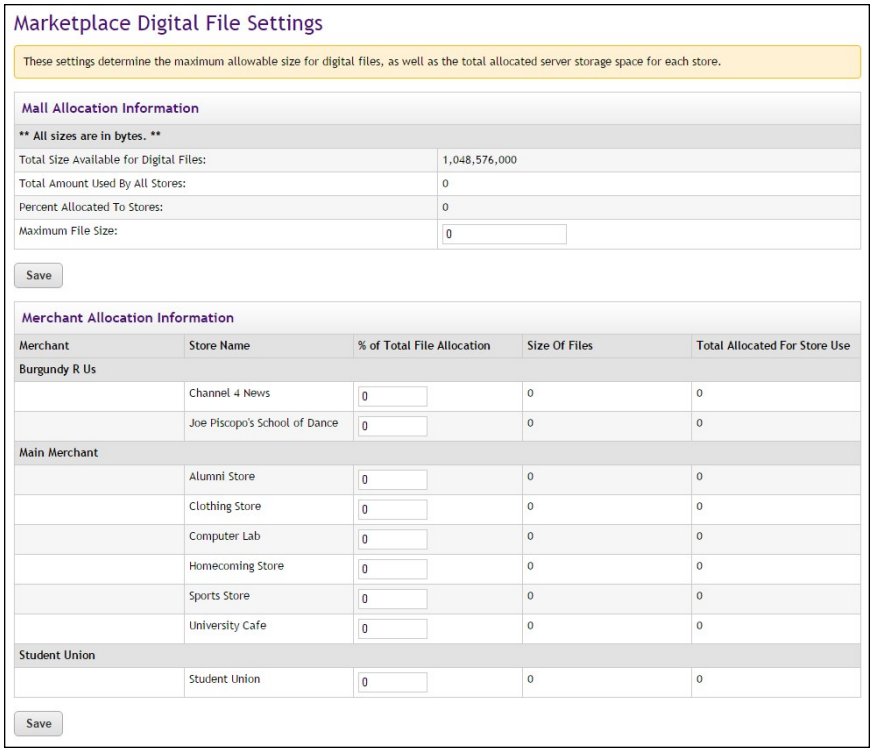
Note: New stores are added to the bottom of the store list.

3 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.



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

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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 10,485,760 bytes (10 MB). If you would like to change this limit, you must edit the *critical.prp* file. See the *Marketplace 8.9 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.

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Size of Files

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

Total Allocated For Store Use

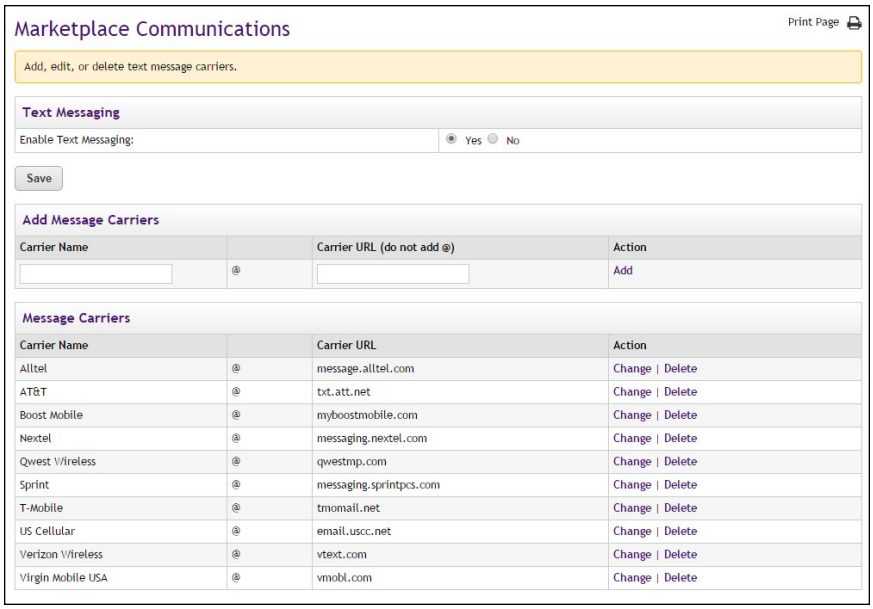
The total amount of server space that is available to an individual store for digital files.

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.



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

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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. Stores managers complete these setup steps, as described in **"Text Messaging" on page 176**.

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.

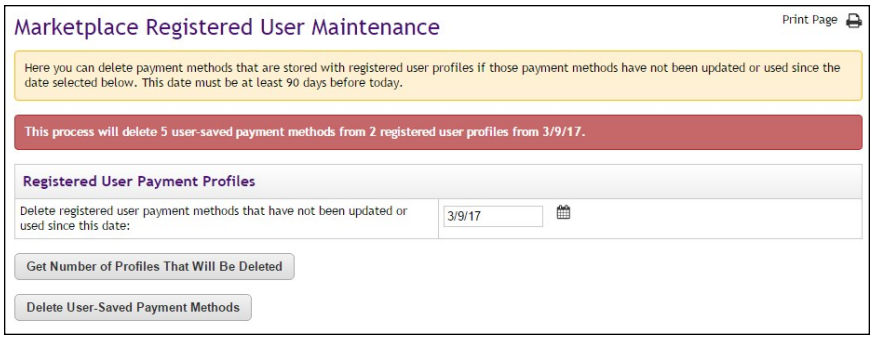
To Delete an Existing Text Message Carrier

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

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 by using the Registered User Maintenance page. Only users with the chief administrator role can access this page. A chief administrator 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.

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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. (Only users with the chief administrator role have access to the Registered User Maintenance page.)

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.

2.4 Template Setup

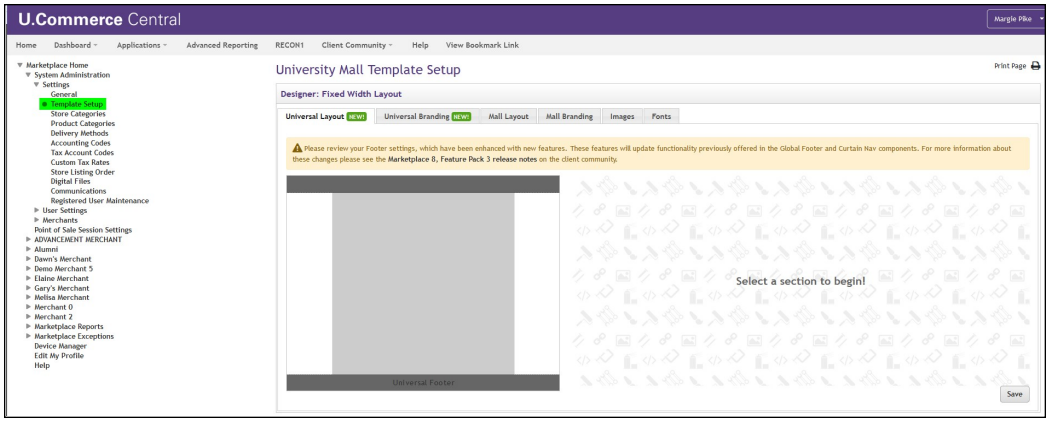
(previously the Mall Layout Template)

With Feature Pack 8.3, the Mall Layout Template has been renamed to the **Template Setup** . The new Template Setup includes the Designer Fixed Width layout and new setup options for the enhanced footer component. The Template Setup menu includes updated template controls that allow the configuration of the "Universal" and "Custom" templates. The Universal template includes configurations for the footer layout and branding as well as the reconfigured Mall level footer layout and branding.

Only users with Chief Administrator or Administrator roles are authorized to make changes to the Universal template.

Access the Template Setup from the Operations Center by selecting **System Administration > Settings > Template Setup**.

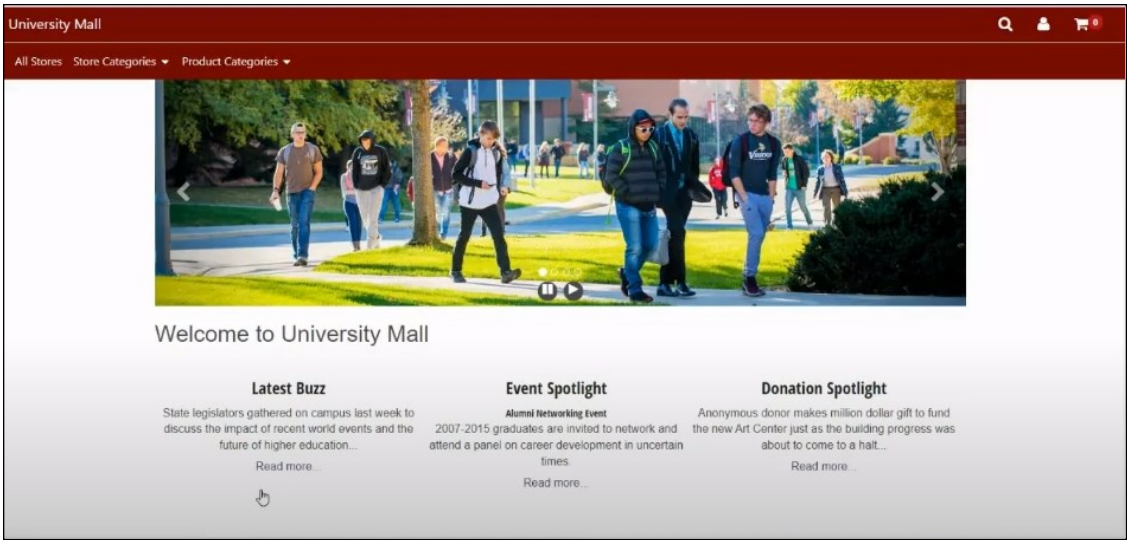
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Template Setup with Univeral Layout tab displayed

The "Designer: Fixed Width" Layout

The "Designer: Fixed Width" layout provides you with layout and configuration options for your Marketplace uStores mall. It features a Global NavBar, Category NavBar, a large area where one or more hero images can be displayed, a feature area where one or more content additions can be configured (these areas support the use of HTML and CSS), and a new Footer layout to support the Universal and Custom templates added with Feature Pack 8.3. The header and footer components are designed to expand horizontally and fill the width of the customer's browser, while the main content area uses a fixed width (1170 pixels wide).



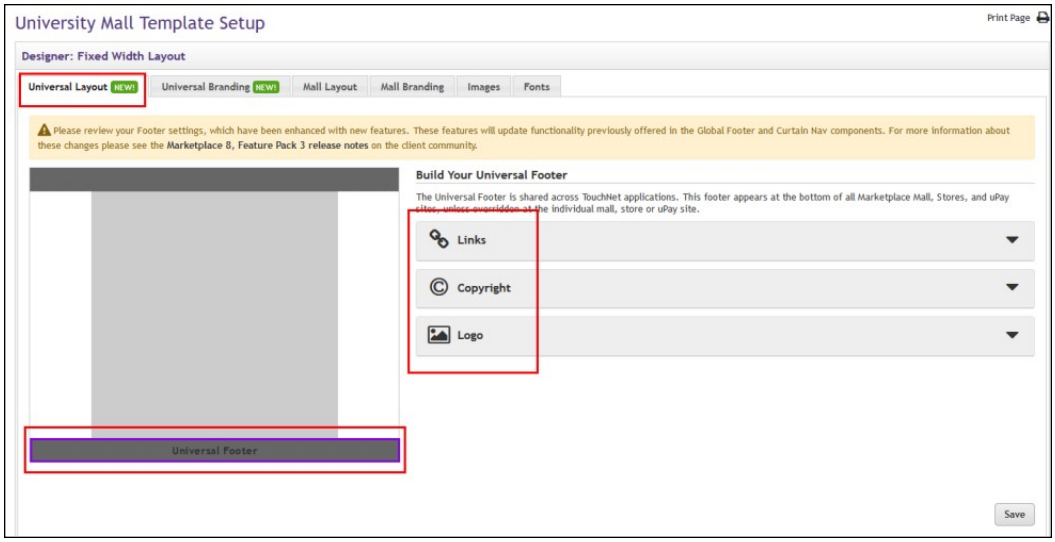
The Designer template has a fixed width of 1140 pixels.

Configuring the Template Setup

You start the process of configuring the template by selecting the desired tab and clicking on the desired section. The options for that section display

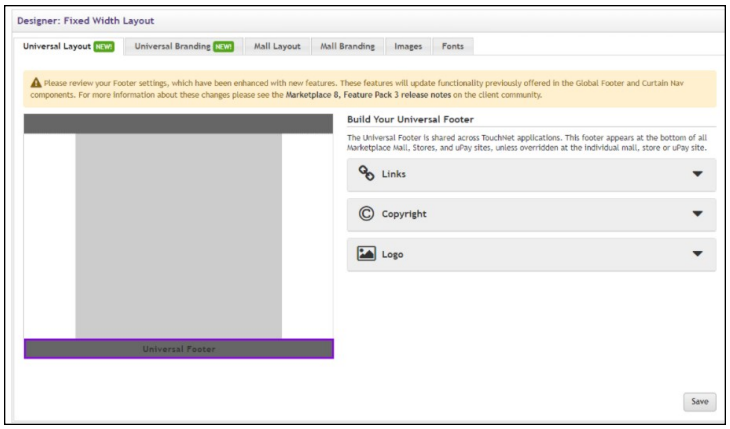
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on the right hand side of the page. The desired Template Setup page then appears, which contains various layout and configuration options.



Using the Designer Template

The "Designer: Fixed Width" layout contains six tabs: Universal Layout, Universal Branding, Mall Layout, Mall Branding, Images, and Fonts.



Designer Fixed Width Layout

- **The Universal Layout and Universal Branding Tabs (NEW with Feature Pack 8.3)** — These tabs allows the configuration of common policy links, logos, and copyright statement that can be shared across
- **The Mall Layout and Mall Branding Tabs**—These tabs allow the creation of a custom template for your Marketplace applications, including the configuration of overrides to the Universal template..
- **Images**—This tab allows you to upload images for use with the Custom Content fields and the Custom Styles fields.
- **Fonts**—This tab allows you to customize the fonts for your school in the footer.

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Privacy Policy

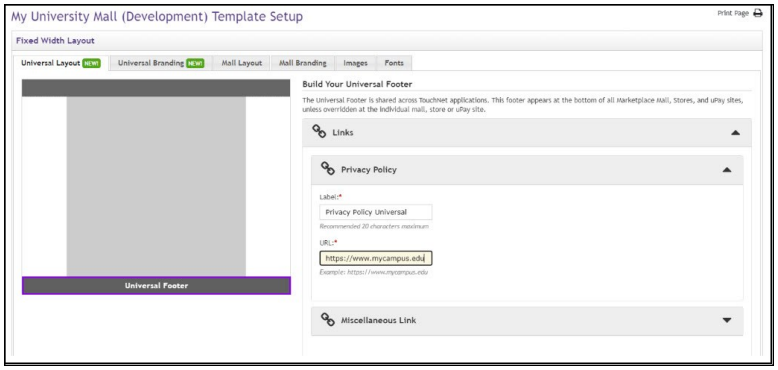
An institution-level privacy policy is required to save a template. This policy will be displayed in the footer for both uStores and uPay.

Administrative users with the Chief Administrator, Administrator, Merchant Manager, uPay Site Manager or uStore Manager role will see an alert message reminding them that Privacy Policy is now required on the Marketplace Home page. This alert message will display once per session.

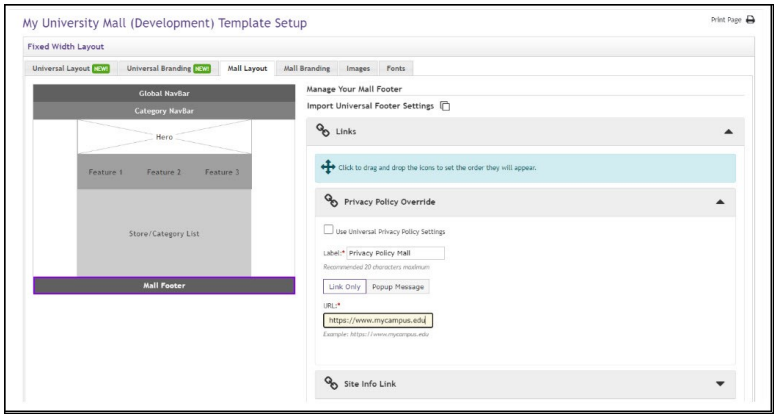


Within the System Administration > Settings > Template Setup section of Marketplace Operations Center the following changes have been made to the footer templates:

- Privacy Policy and URL now show as required. To save the Universal Footer these values must be completed.

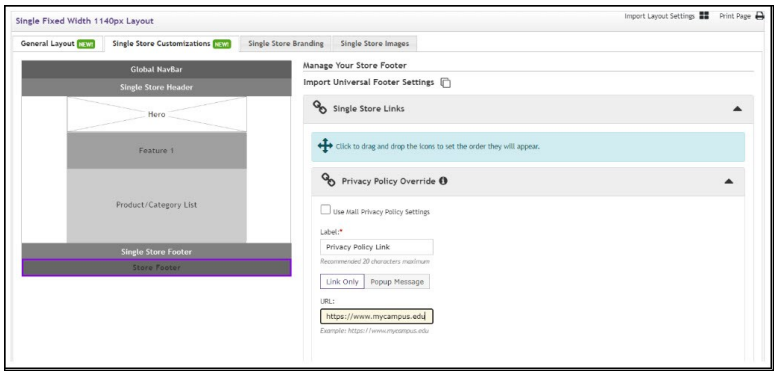


- On the Mall Layout tab a new "Use Universal Privacy Policy Settings" checkbox will appear. Administrators will be able to either check this box or enter a Marketplace specific Privacy Policy label and URL/HTML Content. Selecting one of these options will be required to save the mall footer.

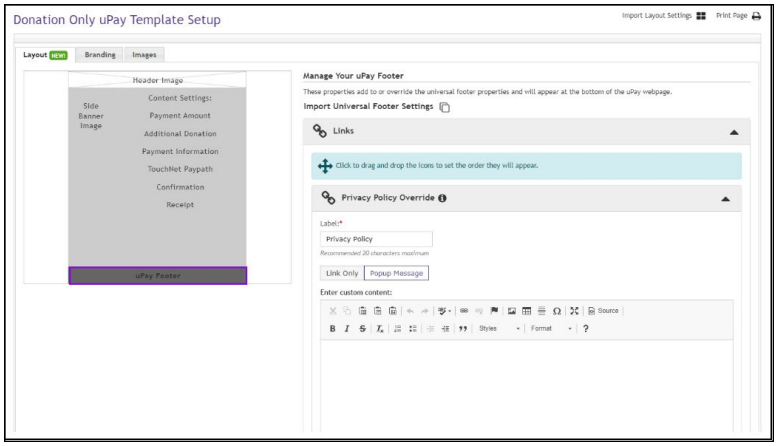


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- On the Single Store Customizations tab the “Use Mall Privacy Policy Settings” checkbox will appear. Administrators will be able to either check this box or enter a Single Store specific Privacy Policy label and URL/HTML Content.



- On the uPay Site Template Setup tab a Privacy Policy Override may be entered if the Universal/Mall policy should not be used.



Within uPay and uStores the site or store-specific policy will be displayed if populated. If a site or store-specific policy is not populated, the application will fallback to using the Mall Layout specified policy (or the Universal Footer policy, if checked).

The Universal Layout Tab

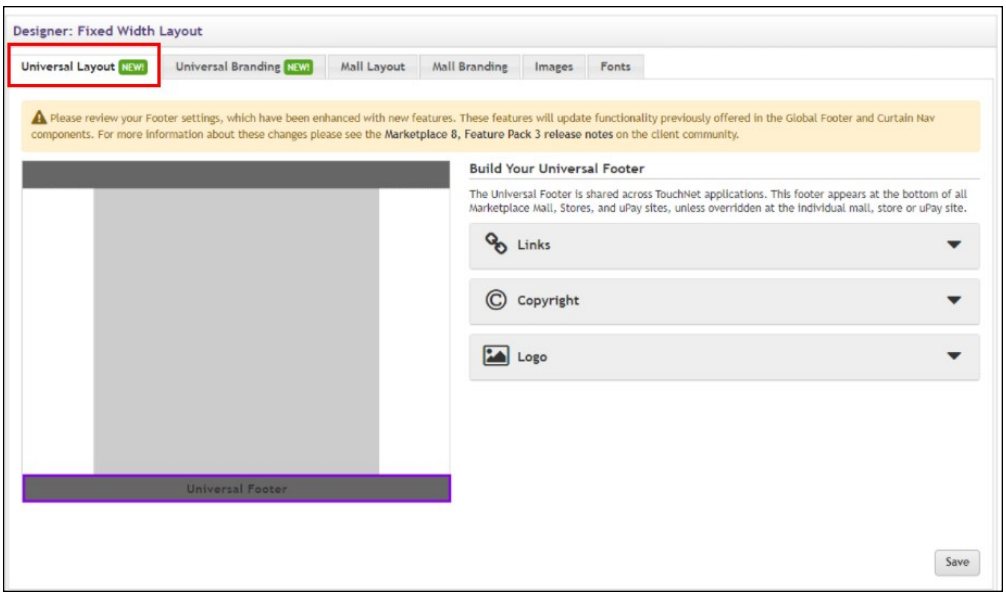
The Universal Layout tab allows your school to configure your universal footer with common policy links, logos and copyright statements that can be shared across TouchNet’s applications. The footer appears at the bottom of all the Marketplace Mall, Stores, and uPay sites. When the Universal Template is configured these settings can be displayed in uStores or uPay or can be overridden for the mall, store or uPay site. Settings that may be configured at the Universal Layout level are:

- **Links** - the Privacy Policy Link - institution wide privacy policy can be configured and enabled and Miscellaneous Link - additional institution wide policies, such as Accessibility, can be configured and enabled

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- **Copyright** - the Copyright statement - statement can be configured via HTML editor and enabled
- **Logo** - the Footer logo image can be configured and enabled

Important! Don't forget that Universal Layout and Branding settings are shared with other TouchNet applications. Always be sure that updates are appropriate across your institution's products.



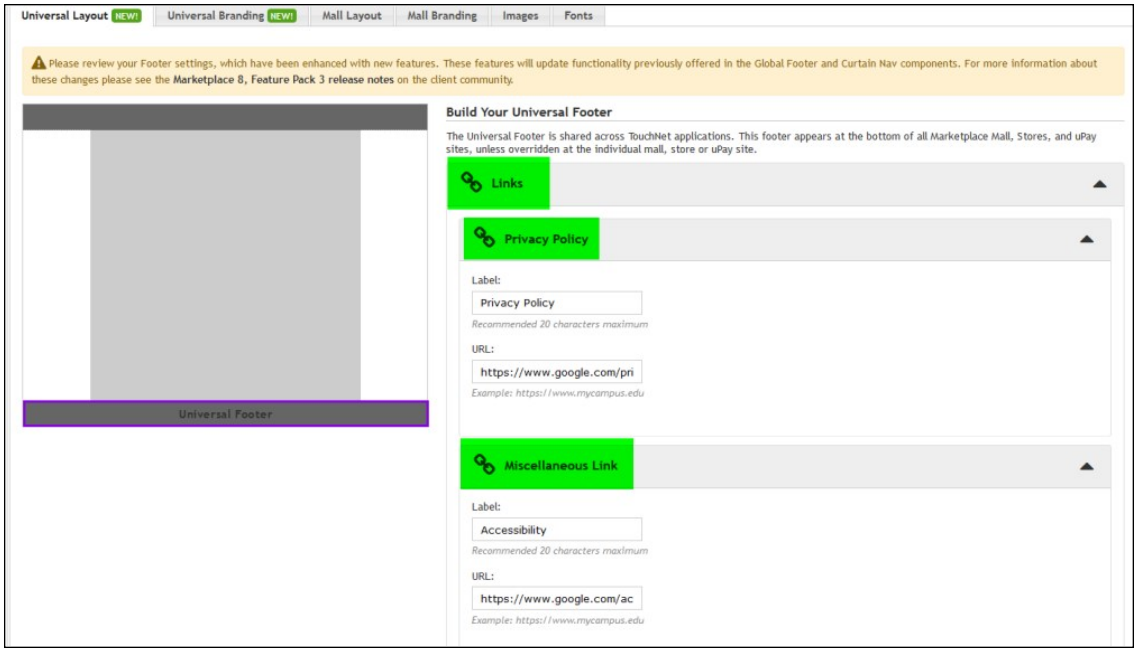
Universal Layout tab

Configuring Links

To configure your universal footer links, click the Links drop down arrow to display the Privacy Policy and Miscellaneous Link options.

- **Privacy Policy** - In the Label field, enter a name for school's privacy policy that will display in the footer. Enter the URL that will link to your school's privacy policy in the URL field.
- **Miscellaneous Link** - In the Label field, enter the desired name for the link that will display in the footer. Enter the URL that will link to the miscellaneous link in the URL field.

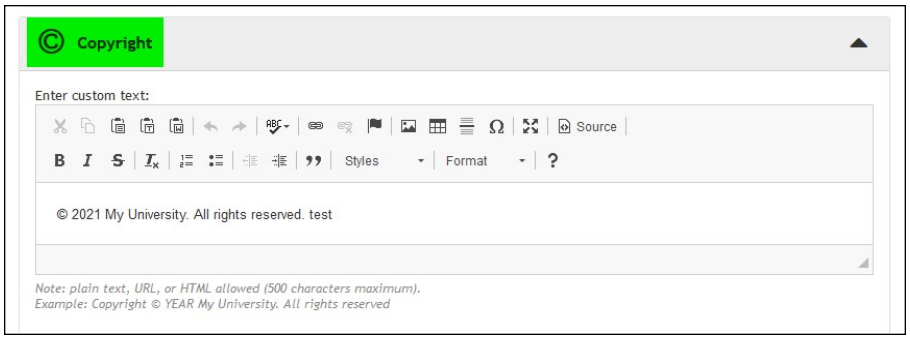
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Configuring the Copyright

To enter your school's copyright for your universal footer layout, click the Copyright drop down and enter the desired copyright information. You have the ability to customize the text using the toolbar. You can change the font style, font appearance, and format.

Note: There is a 500 character limit for the copyright and you can use plain text, URL or HTML.

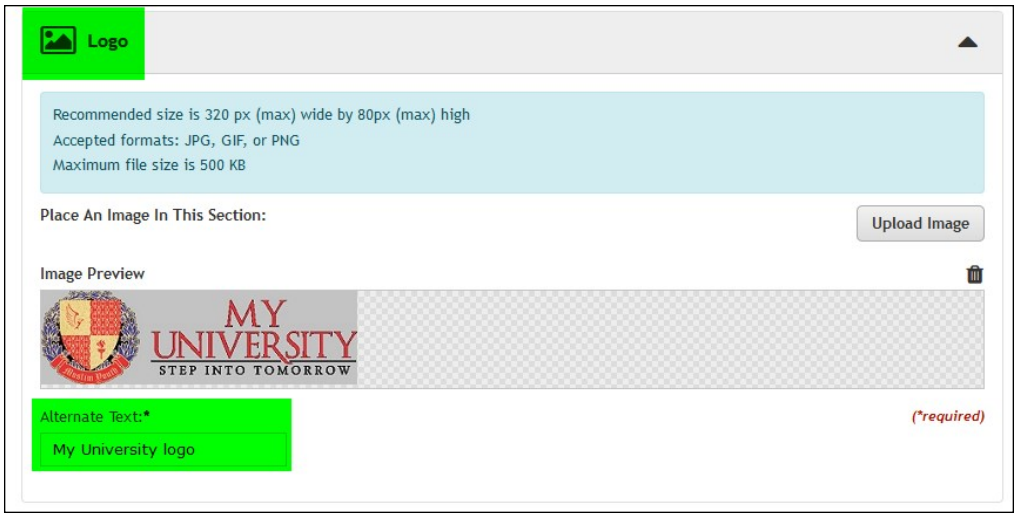


Uploading the Logo Image

Click on the Logo drop down arrow to upload your school's logo image that you would like to display on the Universal footer.

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You must also enter a name or description for your image in the Altenate Text field. (This is a required field.)



Important! Once you have completed all the desired configurations for these Universal footer options, click the **Save** button to save your configuration choices.

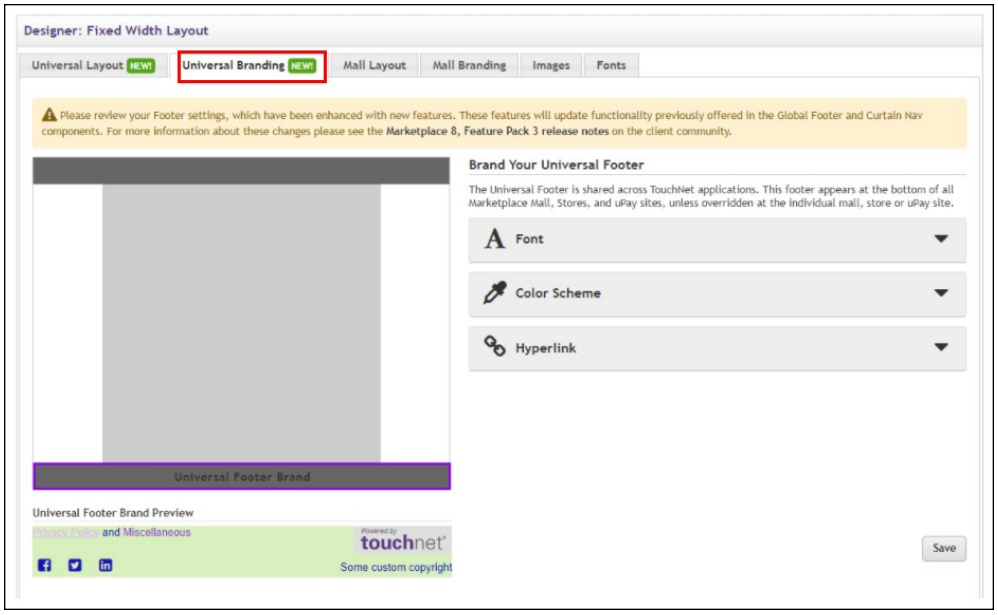
The Universal Branding Tab

This tab is new with Feature Pack 8.3. The Universal Branding tab allows your school to configure the fonts, color schemes, and hyperlinks for your Universal footer, that can be shared across TouchNet's applications. When the Universal Template is configured these settings can be displayed in uStores or uPay or can be overridden for the mall, store or uPay site. Settings that may be configured at the Universal Branding level are:

- Footer font family,
- color schemes
- hyperlink color schemes (can be configured and enabled)

Important! Don't forget that Universal Layout and Branding settings are shared with other TouchNet applications. Always be sure that updates are appropriate across your institution's products.

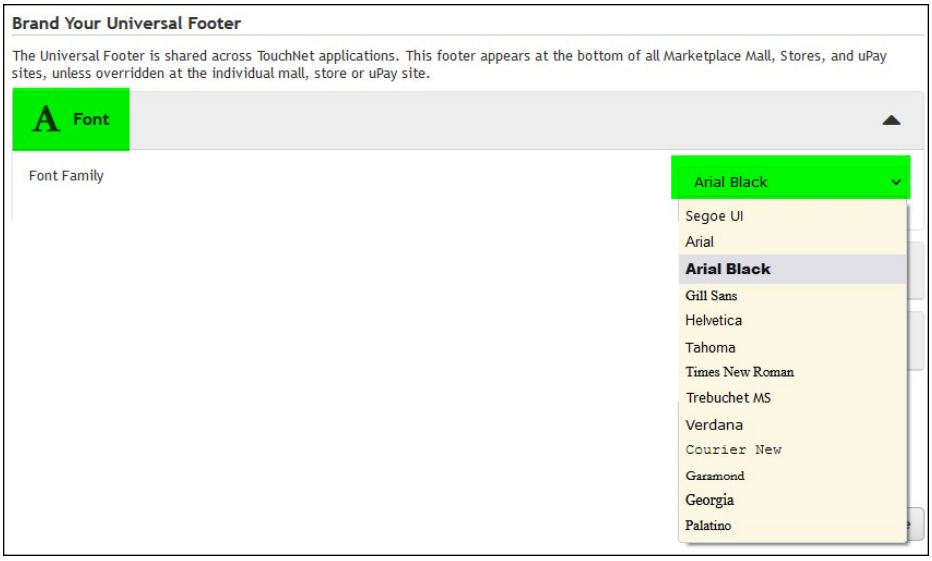
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Universal Branding tab

Selecting the Font Style

To select the desired font style for the text in your Universal footer, click the Font drop down arrow and select the desired font style from the drop down menu.

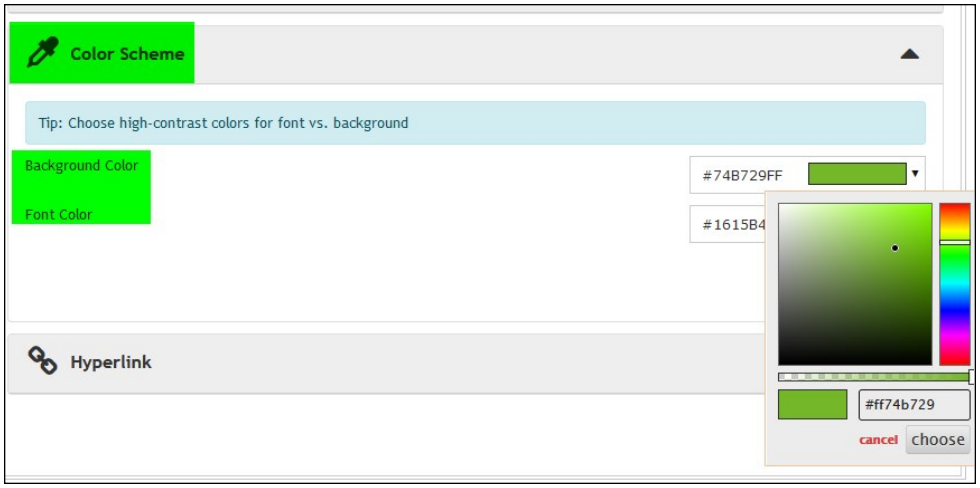


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Selecting the Color Schemes

Click the Color Scheme drop down arrow to display the color selections for the background and font colors. You can customize the colors to match your school colors or desired any color.

Click the drop down arrow and select from the desired color options or enter the code for a specific color (like your school colors).



Configuring the Hyperlink Display

Use the Hyperlink option to configure how the hyperlink will display in your Universal footer. Click the drop down arrow and select the desired options.

- Font Color - select the desired color from the options displayed.
- Text Decoration - if you wish the hyperlink text to be underlined, click that option from the drop down.
- Hover Font Color - select the desired color you wish to display when the user hovers over the hyperlink.
- Hover Text Decoration - if you want the hyperlink text to be underlined when the user hovers over the hyperlink, click that option from the drop down.

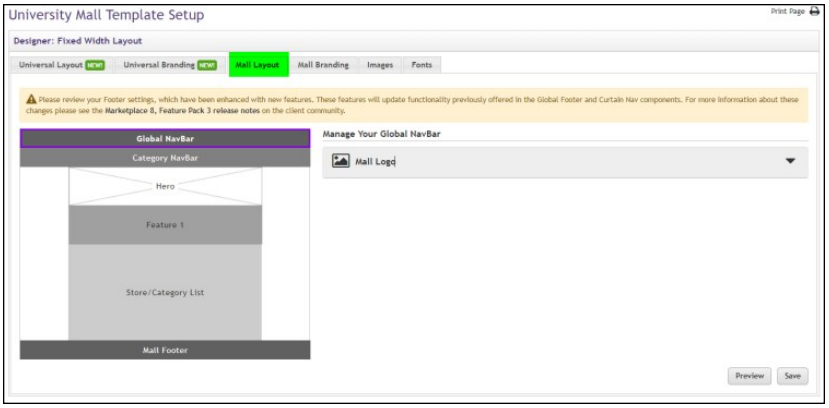
Important! Once you have completed all the desired configurations for these Universal footer options, click the **Save** button to save your configuration choices.

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The Mall Layout Tab

This tab contains a graphical representation of the Designer: Fixed Width Layout. As you move your mouse over each component, a black outline will appear around each component that can be configured. You can click on the various components to see the related configuration settings. The components that can be configured include:

- Global NavBar
- Hero Image
- one or more Feature fields
- Mall Footer



The Mall Layout tab

With Feature Pack 8.3, the Mall Layout tab allows the configuration of overrides to the Universal template or the creation of a custom template for your Marketplace applications. The following settings are configured at the mall level are:

- Overrides or custom content for the Universal footer's privacy policy and miscellaneous policy links.

  Note: If a link is turned "off" on the mall layout tab then it will not be displayed in the mall or mall stores, even if a link URL or content is loaded for the universal layout or mall layout.

- Override or custom content for the Universal footer's logo and copyright statements.

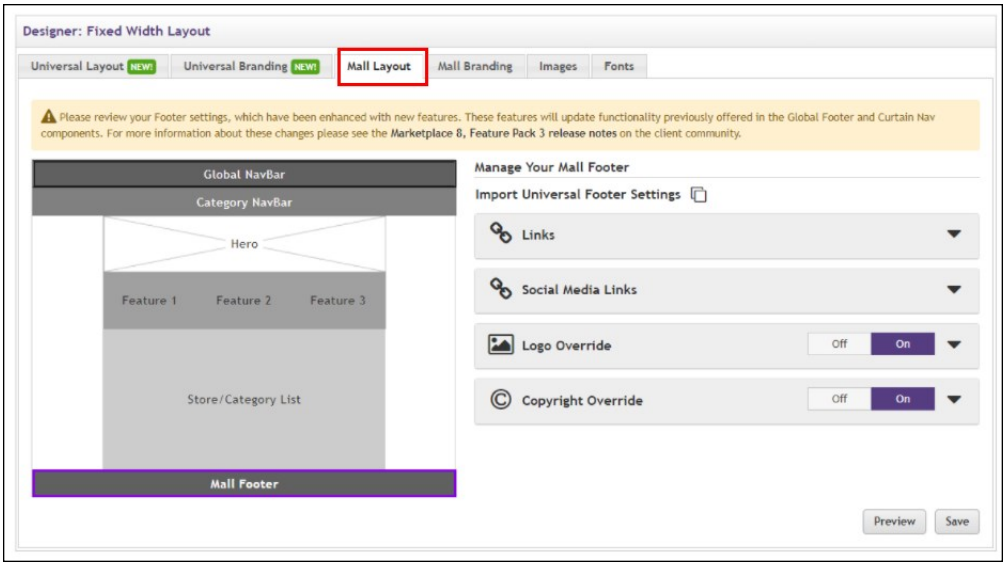
  Note: If these properties are turned "off" on the mall layout tab then they will not be displayed in the mall or mall stores, even if a logo or copyright statement is loaded for the universal layout or mall layout.

- Mall links for Help, Site Information, Contact Us, Default Return Policy Labels and additional links will be moved from the curtain navigation to the footer. When configured these links will appear in

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the footer component. Drag and drop can be used to set the order of the links.

- Social Media links for Facebook, LinkedIn and Twitter will be moved to the footer component. Drag and drop can be used to set the order of the links.



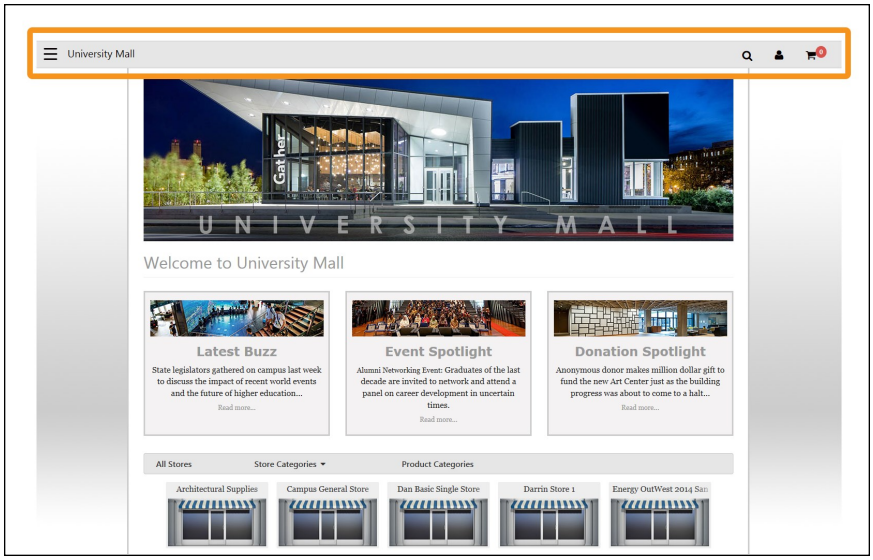
Mall Layout tab

Important! Once you have completed all the desired configurations for these Mall Layout options, click the **Save** button to save your configuration choices. You can also select the Preview button to launch the mall in Preview mode.

Mall Layout: Managing Your Global NavBar

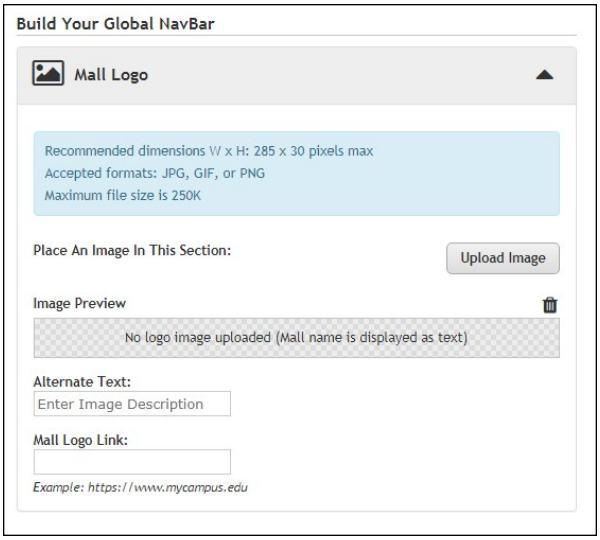
The Global NavBar always appears as part of your Marketplace mall when you use the Designer template layout. The Global NavBar appears at the top of the page and stretches across the width of the page.

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The Global NavBar appears at the top of the browser window.

To edit the Global NavBar, select the Global NavBar area on the Mall Layout tab. The Manage Your Global NavBar options then appear. These options allow you to upload a mall logo image and to enter some related settings.



Administrators can configure the Global NavBar.

We recommend you upload a Mall Logo image. Ideally, this image should be 285 pixels wide and 30 pixels high. The accepted formats are: JPG, GIF, or PNG and the maximum file size is 500K. As you plan for uploading a Mall Logo image, you should consider what background color to use with the Global NavBar, as well as the border color. These settings are on the Mall Branding tab.

We recommend you use a Mall Logo with a transparent background. Transparency is available with the GIF and PNG file formats. If you use a

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Mall Logo with a transparent background, the Mall Logo image will blend into the background color that you have chosen for the Global NavBar.

Note: If you do not upload a mall header, the mall name will appear as text in the Global NavBar. (The font family and color is determined by settings on the Mall Branding tab.)

Additional settings:

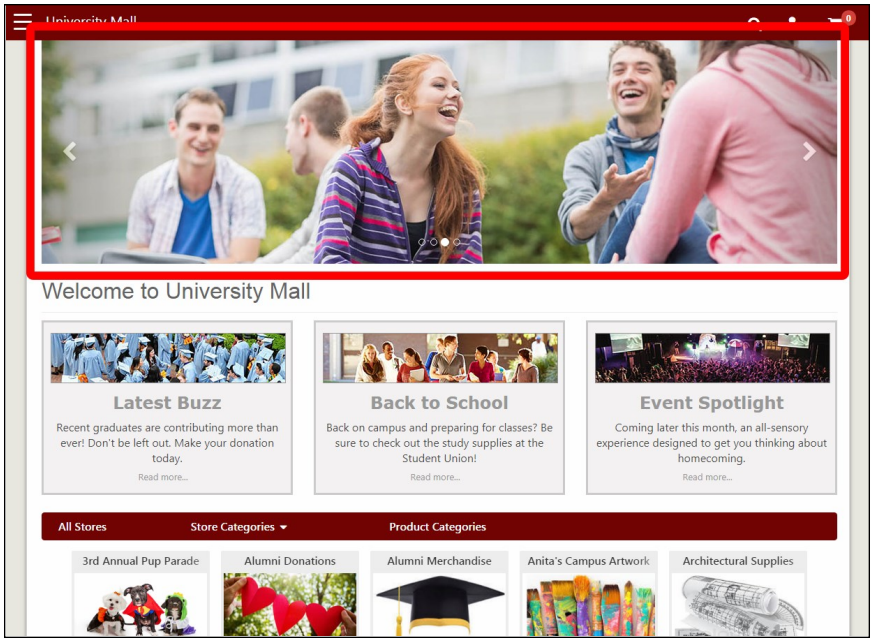
- **Alternative Text**—This field is required after you upload an image. Your entry in this field will be displayed to customers in those cases in which the Mall Logo image does not display. For example, a sight-impaired user with a screen reader would hear the Alternate Text entry read to them.
- **Mall Logo Link**—If you enter a URL in this field, customers can select the Mall Logo image to launch a corresponding web page. For example, you might enter the URL for the home page of your school's portal web site.

Mall Layout: Managing Your Hero Image(s)

The Global Navbar The hero image appears on your mall home page and typically serves as the focal point for this page. We recommend you use an image 1140 pixels wide by 320 pixels high. The hero image is optional. Multiple hero images can be uploaded to appear in a carousel of mall hero images.

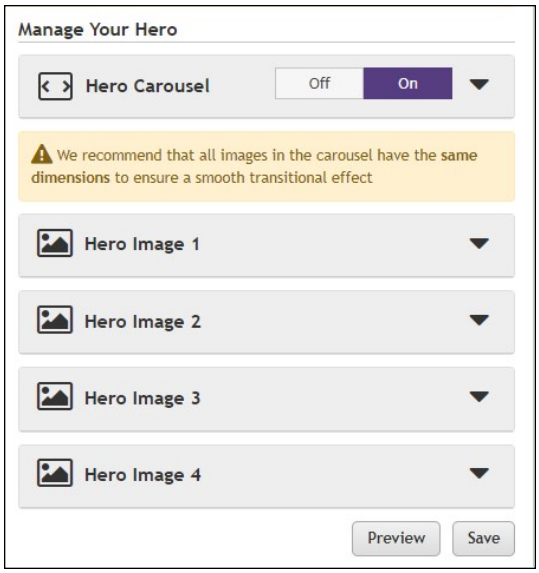
Note: To minimize vertical scrolling for your customers, you can use images less than 320 pixels high; however, the images should always be 1140 pixels wide.

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The Hero Image (outlined in red above) typically serves as the focal point when customers visit the home page of your Marketplace mall.

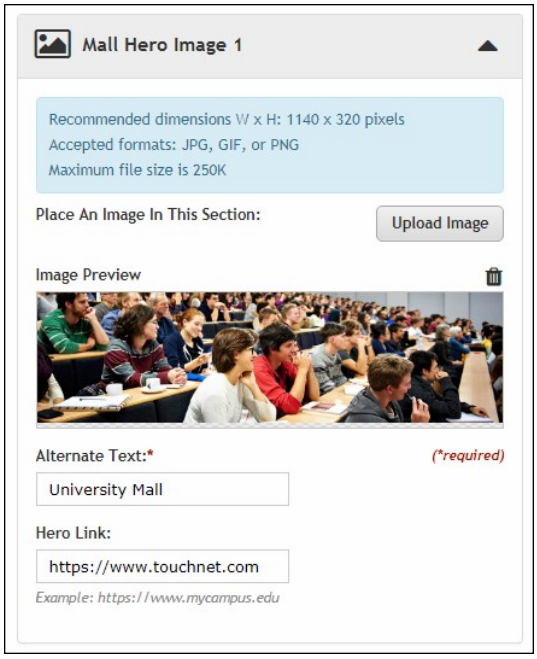
To add or edit the Hero Image, select the Hero Image area on the Mall Layout tab. The Build Your Hero options then appear. These options allow you to upload one or more hero images and to enter some related settings. By default, the Build Your Hero image settings allow you to upload one hero image; however, you can use the Mall Hero Carousel settings to build an image carousel with more than one image.



To turn on the Mall Hero Carousel, select the On button. Then click the down arrow to open the configuration panel. The following settings then appear:

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- **Automatically cycle images?**—Select Yes to cycle through the hero images automatically. Or select No to display Mall Hero Image 1 by default; however, shoppers can manually select the arrows on the hero image carousel to view the additional carousel images (or select the dots at the bottom center of each image).
- **Time interval in seconds**—When you select Yes for "Automatically cycle images," this field becomes active. Enter a time in seconds for each hero carousel image to be displayed. (Minimum time interval: 3 seconds. Maximum time interval: 60 seconds.)
- **How many images?**—The Mall Hero Carousel allows you to upload 2, 3, 4, or 5 images. Select the number that corresponds to the number of hero images that you would like to display. When you select a number of images to display, a corresponding number of Mall Hero Image field sets appear. To configure a Mall Hero Image select the down arrow for that image. The upload button, the image preview, and the other settings then appear.



Administrators can upload a Hero Image.

Choose the Upload Image button to upload a hero image. Accepted file formats: JPG, GIF, or PNG. Maximum file size is 250 KB.

> ***Important!*** We recommend all images in the carousel use the same pixel dimensions. If the carousel images are the same size, the transitional effect will be smooth.

Additional settings:

- **Alternate Text**—This field is required after you upload an image. Your entry in this field will be displayed to customers in those cases in

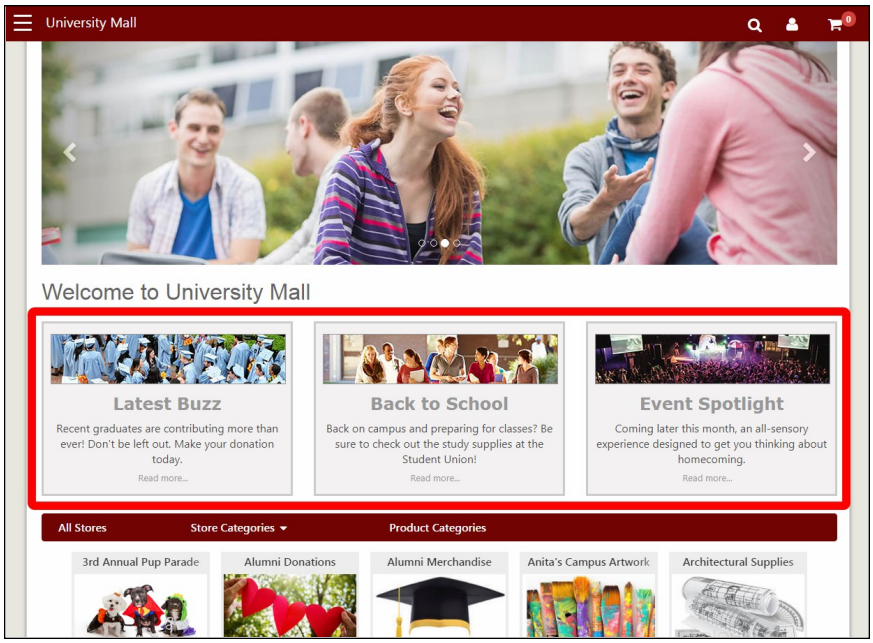
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which the hero image does not display. For example, a sight-impaired user with a screen reader would hear the Alternate Text entry read to them.

- **Hero Link**—This field determines what happens if a customer clicks on the hero image. You can enter a URL, to which the customer will be directed. Be sure to enter the complete URL, including "http://" or https://" as appropriate.

The Mall Layout Tab: Managing Your Feature(s)

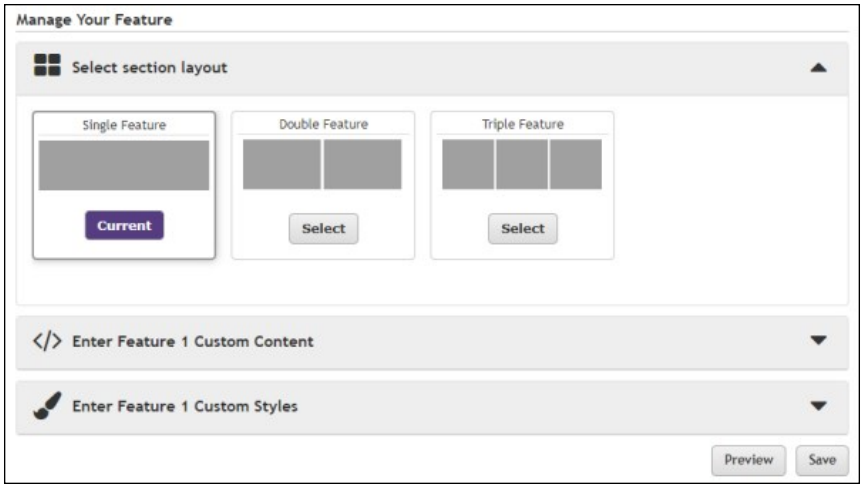
The Features fields are optional; however, these fields are potentially powerful. You can use these fields to add content to your mall home page. This content might consist of a simple text message for your customers or it might include more complex formatting, even HTML and images.



This mall home page uses a "Triple Feature" (outlined in red above).

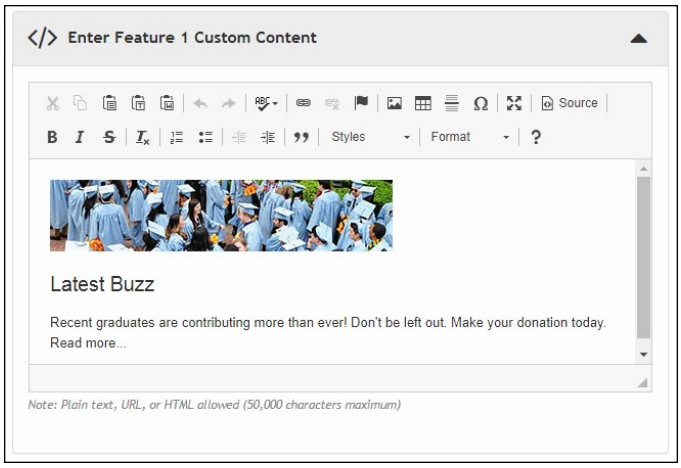
The "Select section layout" field gives you three selections: Single Feature, Double Feature, and Triple Feature. These selection represent how many separate feature sections to generated. If you choose Single Feature, you get one feature area that spans the entire width of the mall content area. If you choose Double Feature, you get two feature ares are arranged side by side, like two columns. And if you choose Triple Feature, you get three feature areas arranged side by side.

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Administrators can choose which section layout to use for the Feature areas.

Once you select a layout option for the feature areas, you can choose which feature area to configure by using the Mall Layout display on the left side of the Mall Layout tab. Choose Feature 1 to configure the Feature 1 area, choose Feature 2 to configure Feature 2, etc. Once you have choose a feature area to edit, you will see a "Custom Content" area and a "Custom Styles" area. Choose the down arrows to access the configuration settings for these fields.



Administrators can add content to the Custom Content fields.

Your entry in the **Custom Content** field might consist of a simple text message or it might include more complex formatting, even HTML.

The Custom Content field includes a large text entry area and a toolbar with various buttons that can be used for adding formatting. You can use the buttons to add styling, images, tables, horizontal lines, hyperlinks, numbered lists, bulleted lists, or block quotes.

Note: When you select the image button, you will be asked for the URL for the image. This URL can reference an image on an external server, or it

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can point at an image that you have uploaded for use with Marketplace. See **"The Images Tab " on page 101** for more information about URLs/paths.

You can use the Source button to view the HTML code that will be used with the Custom Content field. You can edit this HTML or add new HTML.

Any HTML entered in the Custom Content field can utilize CSS that has been added via the **Custom Styles** field.



Administrators can add CSS to the Custom Styles field.

When you select the Save button, a **validation process** takes place. Any HTML 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 entry in the Enter Custom Content field. We recommend you become proficient in authoring HTML before you attempt to enter HTML is this field.

For more information about the allowed HTML and CSS code, see the *Security Validation Guide*.

The Enter Custom Content field and the Enter Custom Styles field each accept up to 50,000 characters.

Mall Layout: Managing Your Mall Footer

With Feature Pack 8.3, the Mall Footer section is where you configure the overrides to the Universal template or the creation of a custom template for your Marketplace applications. The following settings are configured at the mall level are:

- Overrides or custom content for the Universal footer's privacy policy and miscellaneous policy links.

  Note: If a link is turned "off" on the mall layout tab then it will not be displayed in the mall or mall stores, even if a link URL or content is loaded for the universal layout or mall layout.

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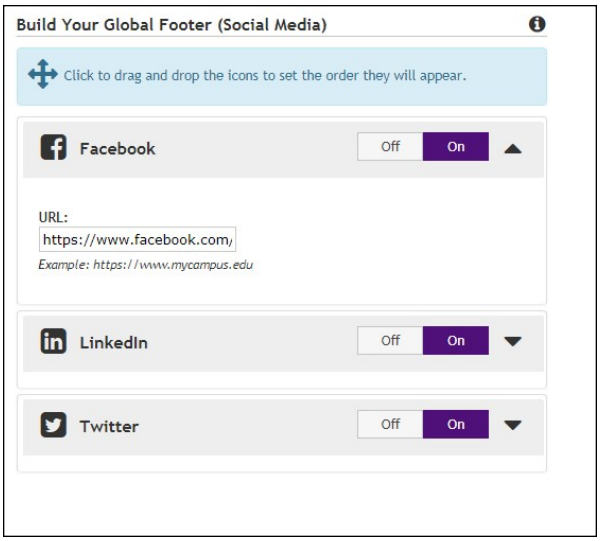
- Override or custom content for the Universal footer's logo and copyright statements.

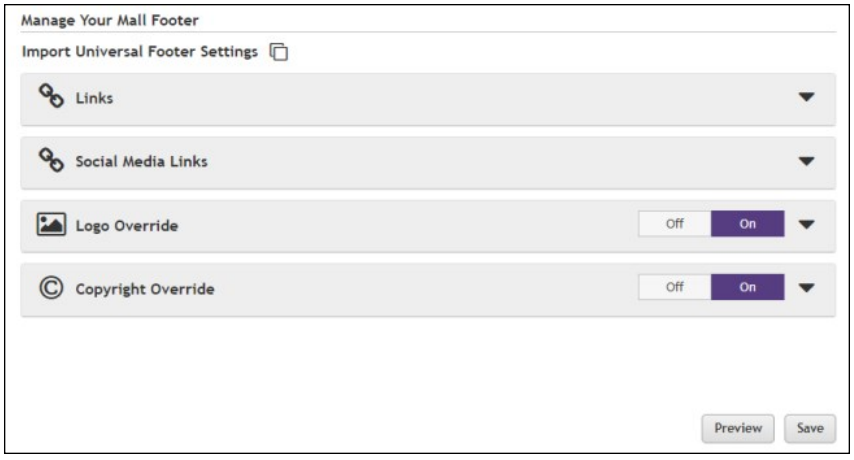
  Note: If these properties are turned "off" on the mall layout tab then they will not be displayed in the mall or mall stores, even if a logo or copyright statement is loaded for the universal layout or mall layout.

- Mall links for Help, Site Information, Contact Us, Default Return Policy Labels and additional links will be moved from the curtain navigation to the footer. When configured these links will appear in

To add or edit the Social Media links, select the Social Media area on the Mall Layout tab. The Build Your Social Media options then appear. Separate sections appear for Facebook, LinkedIn, and Twitter.

Note: To appear as social media selections on this tab, the available social media types must first be activated by a Marketplace administrator on the mall-level General Settings page. If a social media type is greyed out, that means that social media type has not been activated.





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Off/On buttons are available for each social media type. For each social media type that you turn on, select the down arrow to the right of the social media name. You can then enter a **URL**. Your customer's browser will be directed to this URL when they click on the corresponding social media icon on your Marketplace mall.For example, to add a Facebook icon to your Marketplace mall, you should determine the URL for your school's Facebook page and then enter this value in the URL field. Likewise, if you would like to add LinkedIn and Twitter links, you must determine the URLs for your school's LinkedIn and Twitter sites.

Note: When you enter a URL, be sure to include "http://" (or https://, as appropriate) at the beginning of the URL.

You can also click and drag the social media sections to rearrange the order in which these icons will be displayed to customers.

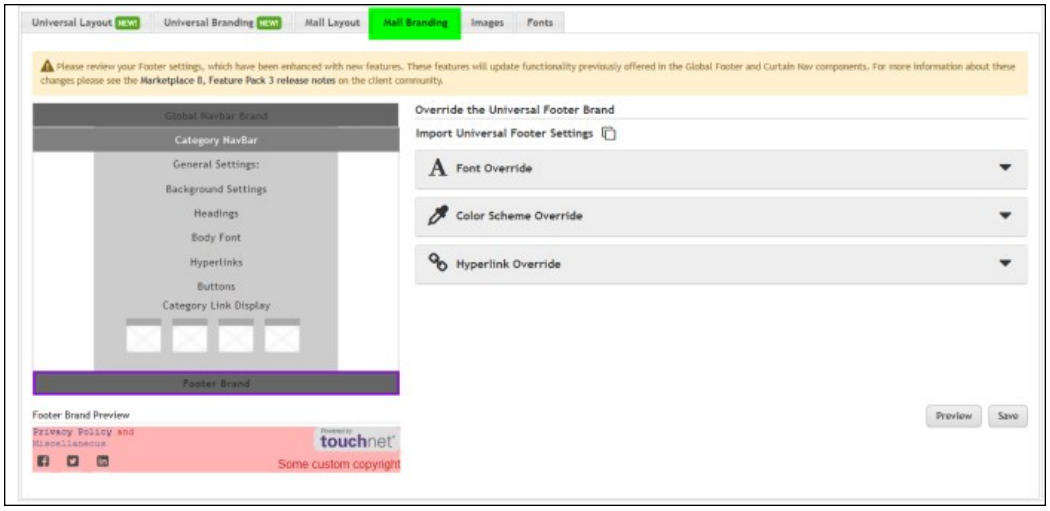
Note: Stores in single-store mode have their own layout settings, which are described in **"The Store Layout Template" on page 183**.

The Mall Branding Tab

This tab contains a graphical representation of the Designer layout. As you move your mouse over each component, a black outline will appear around each component that can be configured. You can click on the various components to see the related configuration settings. The components that can be configured include:

- Global NavBar
- Category NavBar
- Background Settings
- Headings
- Body Font
- Hyperlinks
- Buttons
- Category NavBar
- Category Link Display
- Footer Brand - this is the area where you override the Universal Footer brand.

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Administrators can configure Mall Branding options.

After you click a component, the options for that component appear on the right side of the tab. Plus a Preview image appears below the graphical representation of the template on the left.

The Preview image can be viewed to help you understand how the Mall Branding option values that you selected will be displayed. In the example above, the Global NavBar Brand has been selected. So the Build Your Global Navbar Brand options are displayed on the right, including the Logo Font and the Color Scheme. On the left, the Preview image appears below the graphical representation of the layout The Preview image shows the result of the option values selected on the right, including the green background and the white title font.

Mall Branding Tab: Override the Universal Footer Brand

The Mall Branding tab, footer brand section allows the creation of a custom template for your Marketplace applications, including the configuration of overrides to the Universal template. Settings that can be configured at the mall level are:

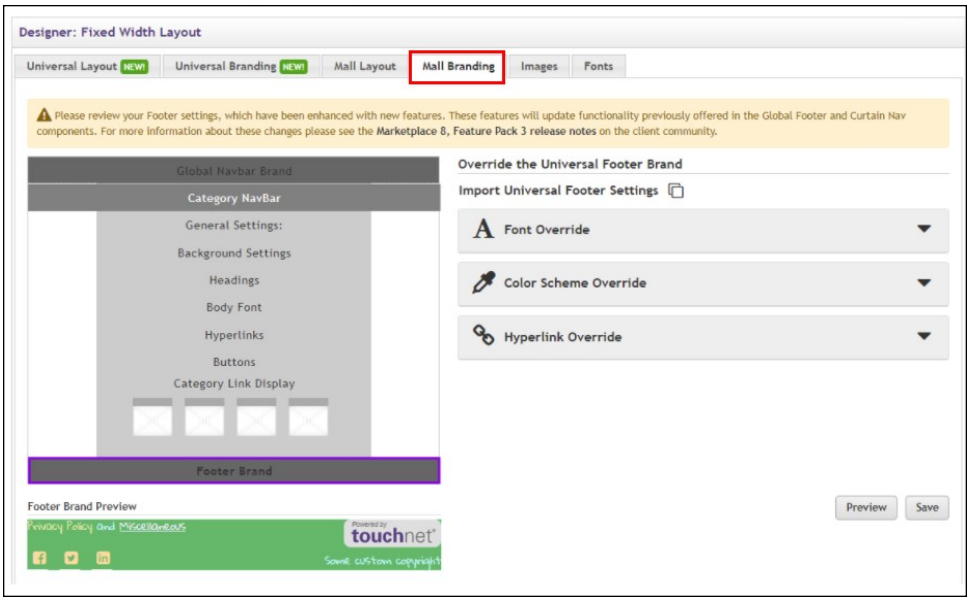
- Overrides or custom branding for Universal footer's font family, color schemes and hyperlink color schemes.

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Important! Existing customers as of Feature Pack 8.3:

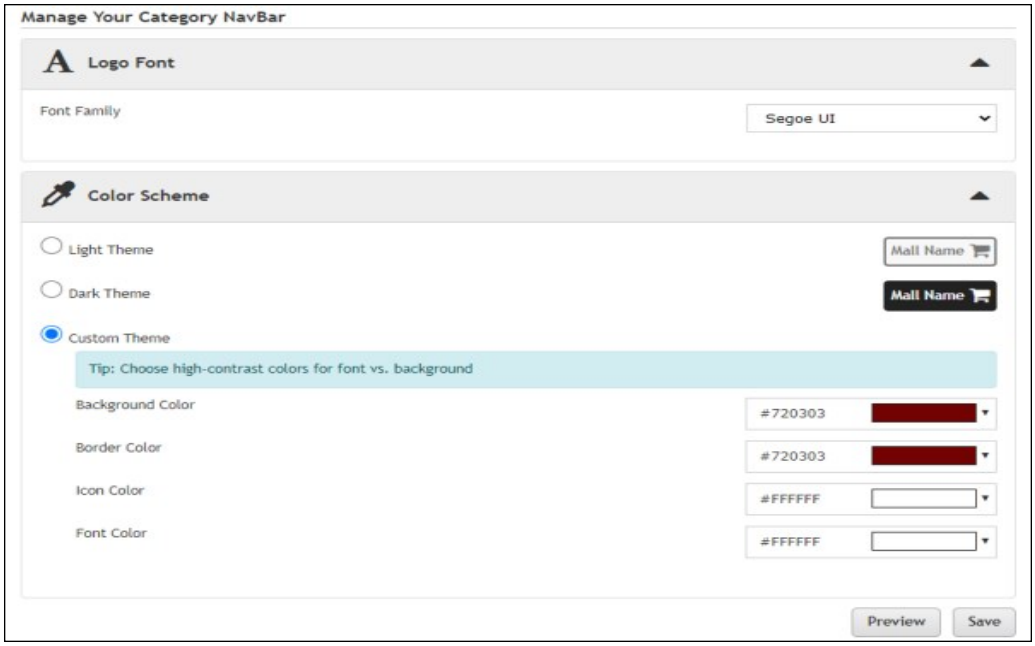
If Universal footer layout and/or branding is desired then remove the mall layout and/or branding configurations or import the universal footer settings so that the Universal footer layout and branding links will be used. ***Note:*** When the universal footer settings are used instead of the mall, you will need to re-import anytime the universal footer changes.

If "custom" settings are desired then update the mall layout and branding settings with custom content, URLs or logos.



- Category Navbar branding will be available on the Mall Branding tab to set the navigation bar's look and feel. For existing customers as of Feature Pack 8.3, the category navbar branding will remain the same but it will appear at a different location on the uStores page.

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Note: Curtain Navigation, Social Media and Category Navbar settings for the mall will be automatically transferred and enabled as a Custom uStores template when Feature Pack 8.3 is installed for existing institutions. Institutions will be able to access and update these controls after implementation as they desire.

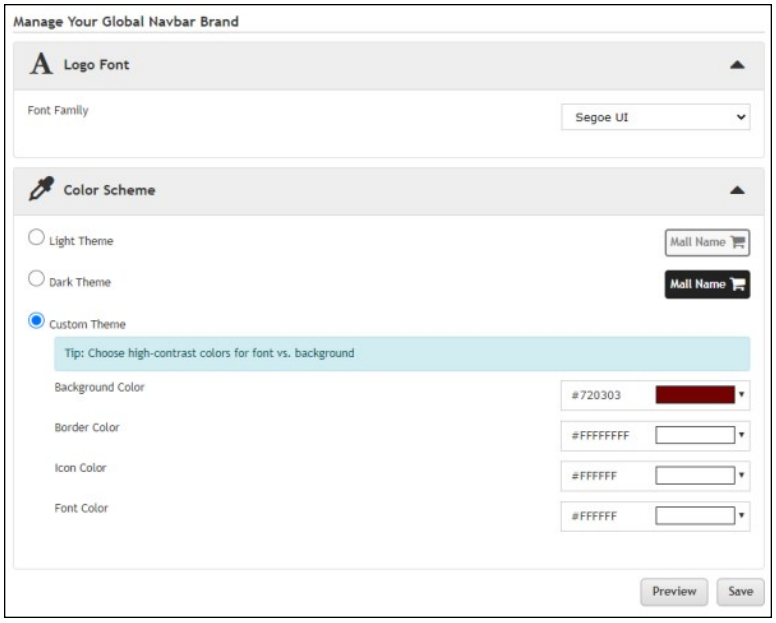
Important! Once you have completed all the desired configurations for these Mall Branding options, click the **Save** button to save your configuration choices. You can also select the Preview button to launch the mall in Preview mode.

Mall Branding Tab: Managing Your Global Navbar Brand

The Global NavBar always appears as part of your Marketplace mall when you use the Designer template layout. The Global NavBar appears at the top of the page and stretches across the width of the page. (You can select a Mall Logo to be displayed in the Global Navbar by using the Global NavBar options on the Mall Layout tab.)

To add or edit the Global Navbar, select the Global Navbar Brand area on the Mall Branding tab. The Build Your Global Navbar Brand options then appear. Separate sections appear for the Logo Font and the Color Scheme. For each option type that you would like to edit, select the down arrow to the right of the corresponding option name. The available options then appear. (More options for the Global Navbar appear on the Mall Layout tab, as described in **"Mall Branding Tab: Managing Your Global Navbar Brand " on page 90**.)

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Administrators can configure the Global Navbar options.

As you plan for modifying the settings, be sure to consider the Mall Logo image on the Mall Layout tab. The color choices that you make must work well with the logo image that you chose.

One option appears in the Logo Font section:

- **Font Family**—Choose a font from the drop-down list. If you do not upload a Mall Logo, the mall name will appear in the Global Navbar. Your font name will be used with the mall name.

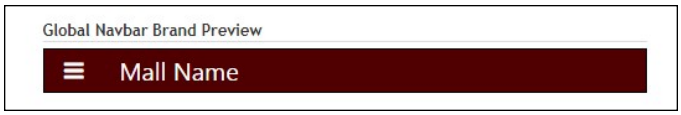
And three options appear in the Color Scheme section. These options control the color scheme for the Global Navbar:

- **Light Theme**—This color scheme uses a light grey background color, a medium dark gray font & icon color, and black as the border color.
- **Dark Theme**—This color scheme uses black as the background color and the border color, and white as the font & icon color.
- **Custom Theme**—If you choose Custom Theme, you can choose the colors for the Nav. The following color options are available:
  - **Background Color**
  - **Border Color**
  - **Font & Icon Color**

  With each of these color options, you make your color selection by using a color picker tool. This tool is activated when you choose the down arrow for each color option. The color picker tool also allows you to enter colors in hexadecimal format (e.g., #FFFFFF for white or #E6E6E6 for grey).

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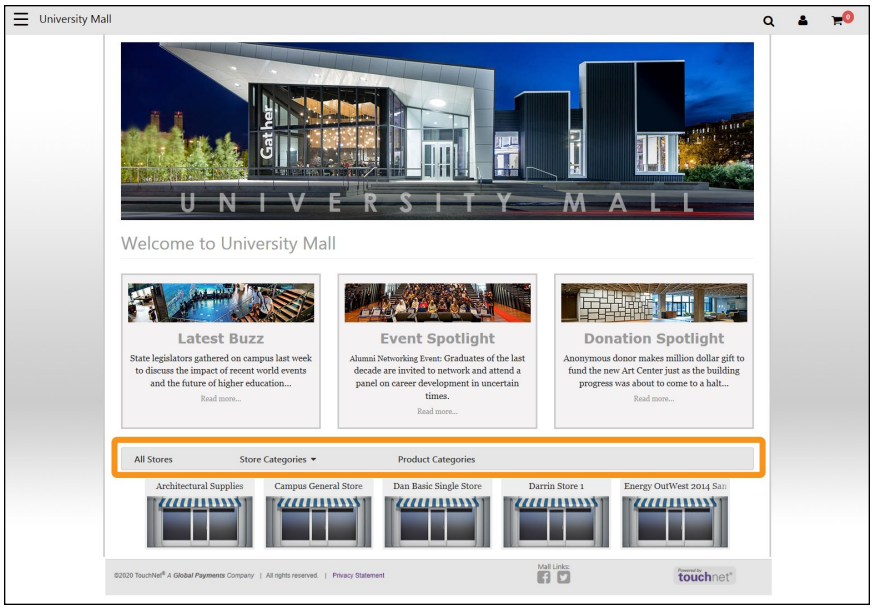
As you make changes to the Global Navbar options, the Preview image will show you the result of the changes that you have entered.



This example uses the Custom Theme option, in which the Background Color is dark red (#500000), the Border Color is black (#000000), and the Font & Icon color is white (#FFFFFF).

Mall Branding Tab: Managing Your Category Navbar

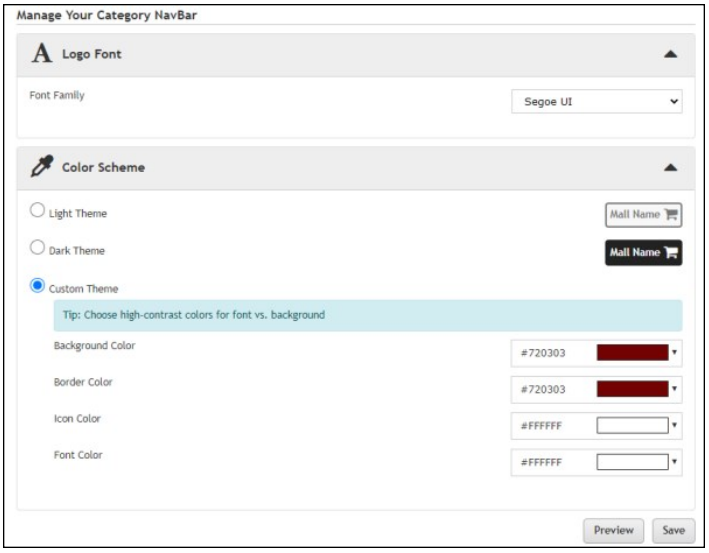
The Category Navbar options affect the display of the navigation bar that appears above the store tiles on the lower portion of the mall home page. (The mall home page is the only place where the Category Navbar appears.)



The Category Navbar (outlined above in orange) appears above the store tiles.

To edit the display options for the Category Navbar, select the Category Navbar area on the Mall Branding tab. The Build Your Category Navbar options then appear.

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Administrators can configure the Category Navbar.

One option appears in the Logo Font section:

- **Font Family**—Choose a font from the drop-down list.

And three options appear in the Color Scheme section. These options control the color scheme for the Category Navbar:

- **Light Theme**—This color scheme uses a light grey background color, a medium dark gray font & icon color, and black as the border color.
- **Dark Theme**—This color scheme uses black as the background color and the border color, and white as the font & icon color.
- **Custom Theme**—If you choose Custom Theme, you can choose the colors for the Category Nav. With each of these color options, you make your color selection by using a color picker tool. This tool is activated when you choose the down arrow for each color option. The color picker tool also allows you to enter colors in hexadecimal format (e.g., #FFFFFF for white or #E6E6E6 for grey).The following color options are available:
  - **Background Color**
  - **Border Color**
  - **Font & Icon Color**

As you make changes to the Category Navbar options, the Preview image will show you the result of the changes that you have entered.

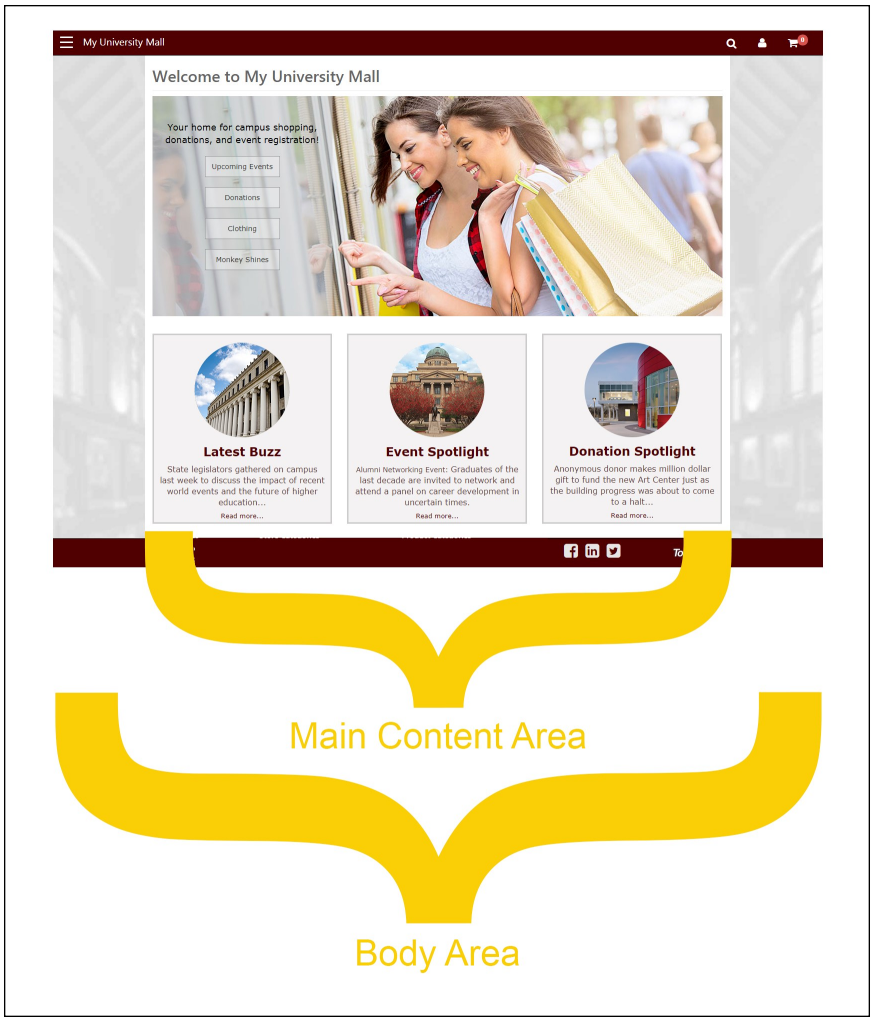


In this example, the Background Color is set to dark red (#500000), the Border Color is set to black (#000000), and the Font & Icon Color is set to white (#FFFFFF).

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Mall Branding Tab: Managing Your Background Settings

The Background Settings affect all pages of your Marketplace mall (except for stores in single-store mode). The Body settings and Main Content settings affect the background color and/or image that appears behind the Marketplace mall pages. The Body area spans the entire width of the browser. The Main Content area is a fixed 1170 pixels wide, and it's centered horizontally on the page.



The background can be configured for the Body area and the Main Content area.

To add or edit the Background settings, select the Background Settings area on the Mall Branding tab. The Build Your Background Settings options then appear.

The following options are available:

- **Body Attachment**—This option determines how the Body Image (optional) will be attached to the page. Of the options available, "none," "scroll," "inherit," "local," and "initial" typically have the

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same affect: the background image will scroll with the rest of the page. However, "fixed" causes the background image to stay in the same position regardless of whether the page is scrolling (so the page contents will scroll over the "fixed" background image). For people familiar with CSS, this option is the same as "background-attachment" on the Body element.

- **Body Color**—You make your Body Color selection by using a color picker tool. This tool is activated when you choose the down arrow. For people familiar with CSS, this option is the same as "background-color" on the Body element. You make your color selection by using a color picker tool. This tool is activated when you choose the down arrow for each color option. The color picker tool also allows you to enter colors in hexadecimal format (e.g., #FFFFFF for white or #E6E6E6 for grey).
- **Body Image**—Click this field to see a list of your uploaded images. Select the image that you would like to use as the background image. For people familiar with CSS, this option is the same as "background-image" on the Body element. (If you have not yet uploaded an image, go to the Images tab and upload your background image. Then return to the Mall Branding tab.)
- **Body Position**—This option determines where the Body Image (optional) will be attached to the page.
  - **none**—Same as "left top."
  - **left top**—The left edge of the image is placed against the left ledge of the browser window. The top of the image is placed against the top edge of the browser window.
  - **left center**—The left edge of the image is placed against the left ledge of the browser window. The vertical center of the image is placed at the vertical center of the browser window.
  - **left bottom**—The left edge of the image is placed against the left ledge of the browser window. The bottom of the image is placed against the bottom edge of the browser window.
  - **right top**—The right edge of the image is placed against the right ledge of the browser window. The top edge of the image is placed against the top edge of the browser window.
  - **right center**—The right edge of the image is placed against the right edge of the browser window. The vertical center of the image is placed at the vertical center of the browser window.
  - **right bottom**—The right edge of the image is placed against the right edge of the browser window. The bottom of the image is placed against the bottom edge of the browser window.
  - **center top**—The horizontal center of the image is placed at the horizontal center of the browser window. The top of the image is placed against the top edge of the browser window.

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  - **center center**—The horizontal center of the image is placed at the horizontal center of the browser window. The vertical center of the image is placed at the vertical center of the browser window.
  - **center bottom**—The horizontal center of the image is placed at the horizontal center of the browser window. The bottom edge of the image is placed against the bottom edge of the browser window.
  - **initial**—Same as "left top."
  - **custom X-axis & Y-axis**—You can enter a location with a pixel value or a percentage. The top left corner of the browser window is considered 0 on the X-axis and 0 on the Y-axis. The distance is figured from the default "left top" location.

  For people familiar with CSS, this option is the same as "background-position" on the Body element.

- **Body Repeat**—This option determines how the Body Image (optional) will be attached to the page.
  - **none**—Same as "repeat."
  - **repeat**—The image will repeat in both the x (horizontal) and y (vertical) directions and therefore tile across the entire browser window.
  - **repeat-x**—The image will repeat only in the x (horizontal) direction.
  - **repeat-y**—The image will repeat only in the y (vertical) direction.
  - **no-repeat**—The image appears only once and will not repeat in either the x (horizontal) or y (vertical) directions.
  - **initial**—Same as "repeat."
  - **inherit**—Same as "repeat."

  For people familiar with CSS, this option is the same as "background-repeat" on the Body element.

- **Main Content Color**—You make your Main Content Color selection by using a color picker tool. This tool is activated when you choose the down arrow. You make your color selection by using a color picker tool. This tool is activated when you choose the down arrow for each color option. The color picker tool also allows you to enter colors in hexadecimal format (e.g., #FFFFFF for white or #E6E6E6 for grey).

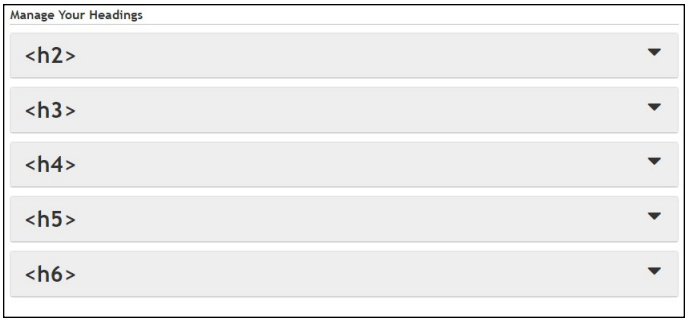
Mall Branding Tab: Managing Your Headings

The Headings options affect text in the main content area. These settings affect all pages in the Marketplace mall (except for stores in single-store mode).

To edit the Headings, select the Headings area on the Mall Branding tab. The Build Your Headings options then appear. Separate sections appear for

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headings <h1> through <h6>. Heading <1> is the largest heading and <h6> is the smallest. For each heading size that you would like to edit, select the down arrow to the right of the corresponding option name. The available options then appear.

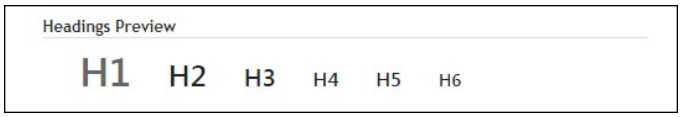


Administrators can configure the Heading settings.

The following options are available for each heading size:

- **Font Color**—You make your Font Color selection by using a color picker tool. This tool is activated when you choose the down arrow to the right of the displayed color sample. You make your color selection by using a color picker tool. This tool is activated when you choose the down arrow for each color option. The color picker tool also allows you to enter colors in hexadecimal format (e.g., #FFFFFF for white or #E6E6E6 for grey).
- **Font Family**—Choose a font from the drop-down list.
- **Font Size**—Choose a font size from the drop-down list. The sizes are in pixels, from 1 to 48.
- **Font Weight**—Choose a font weight from the drop-down list. Choices include normal, bold, bolder, and lighter. Numeric font weights are also available for greater control. For example, 400 is normal and 700 is bold.

As you make changes to the Headings options, the Preview image will show you the result of the changes that you have entered.



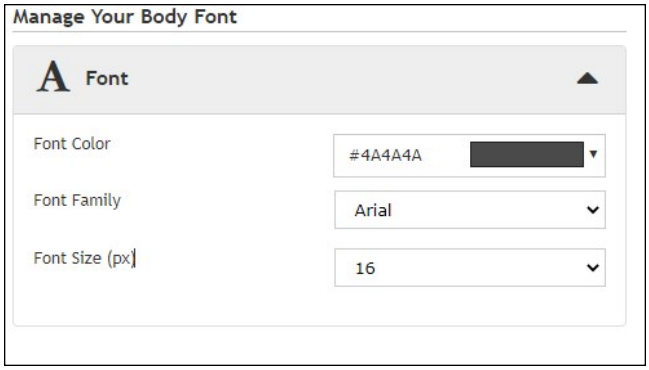
The Preview image shows the result of your Headings selections.

Mall Branding Tab: Managing Your Body Font

The Body Font options affect standard body text in the main content area. These settings affect all pages in the Marketplace mall (except for store in single-store mode).

To edit the Body Font, select the Body Font area on the Mall Branding tab. The Build Your Body Font options then appear.

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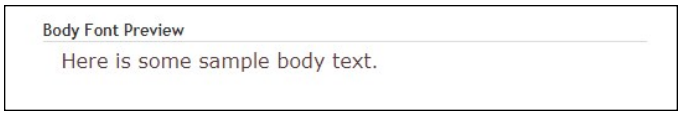


Administrators can configure the Body Font options.

The following options are available:

- **Font Color**—You make your Font Color selection by using a color picker tool. This tool is activated when you choose the down arrow to the right of the displayed color sample. You make your color selection by using a color picker tool. This tool is activated when you choose the down arrow for each color option. The color picker tool also allows you to enter colors in hexadecimal format (e.g., #FFFFFF for white or #E6E6E6 for grey).
- **Font Family**—Choose a font from the drop-down list.
- **Font Size**—Choose a font size from the drop-down list. The sizes are in pixels, from 1 to 48.

As you make changes to the Body Font options, the Preview image will show you the result of the changes that you have entered.



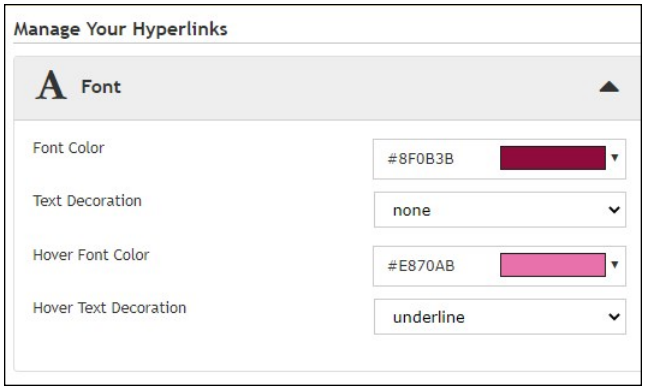
The Preview image shows the result of your Body Font selections..

Mall Branding Tab: Managing Your Hyperlinks

The Hyperlinks options affect hyperlinks on pages throughout the Marketplace Mall (except for stores in single-store mode). Examples of hyperlinks: product names on category pages or product names on store home pages.

To edit the Hyperlinks options, select the Hyperlinks area on the Mall Branding tab. The Build Your Hyperlinks options then appear.

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Administrators can configure the Hyperlinks options.

The following options are available:

- **Font Color**—You make your Font Color selection by using a color picker tool. This tool is activated when you choose the down arrow to the right of the color sample. You make your color selection by using a color picker tool. This tool is activated when you choose the down arrow for each color option. The color picker tool also allows you to enter colors in hexadecimal format (e.g., #FFFFFF for white or #E6E6E6 for grey).
- **Text Decoration**—This option can be used to determine whether hyperlinks should be underlined.
- **Hover Font Color**—You make your Hover Font Color selection by using a color picker tool. This tool is activated when you choose the down arrow to the right of the color sample. You make your color selection by using a color picker tool, as described above for Font Color.
- **Hover Text Decoration**—This option can be used to determine whether the hover state for hyperlinks should be underlined.

As you make changes to the Hyperlinks options, the Preview image will show you the result of the changes that you have entered.



In this example, hyperlinks will be underlined in the hover state

Mall Branding Tab: Managing Your Buttons

The Buttons options affect how buttons are displayed on pages throughout the Marketplace Mall (except for stores in single-store mode). Options are available for two types of buttons: Primary Buttons and Secondary Buttons. The Add to Cart button, for example, is a Primary Button. Likewise, the Checkout button in the shopping cart is also a Primary Button and so is the Continue button in the checkout process.

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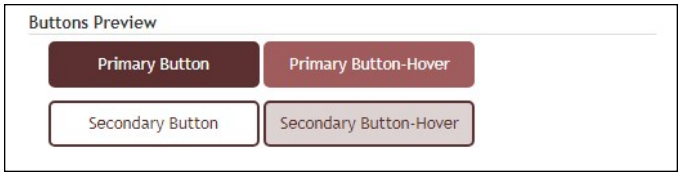
Several other buttons appear that provide secondary functions, such as the Update Cart button and the Continue Shopping button in the shopping cart. These buttons are Secondary Buttons.

To edit the display options for buttons, select the Buttons area on the Mall Branding tab. The Build Your Buttons options then appear.

Administrators can configure how buttons are displayed.

The button options affect the color of the button—its background, its border, and the button text. Separate colors are available for the normal state and the hover state (when the customer's cursor is positioned over the button). You make your color selections by using a color picker tool. This tool is activated when you choose the down arrows to the right of the color sample for each corresponding button part. The color picker tool also allows you to enter colors in hexadecimal format (e.g., #FFFFFF for white or #E6E6E6 for grey).

As you make changes to the Buttons options, the Preview image will show you the result of the changes that you have entered.

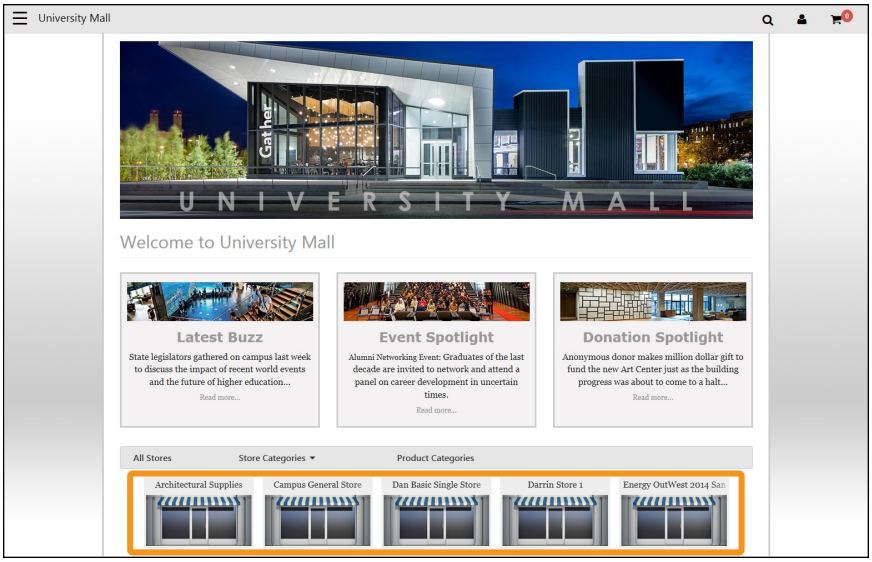


In this example, the primary and secondary buttons use different colors.

Mall Branding Tab: Managing Your Category Link Display

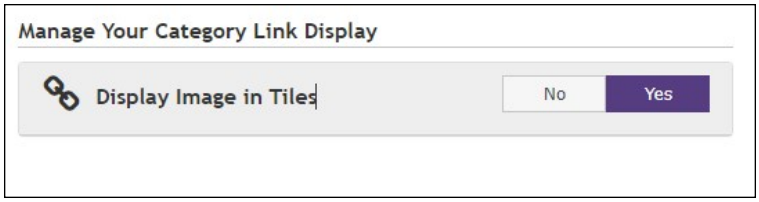
Tiles for each store and category appear in the lower portion of the mall home page, which is called the Category Link Display. Each tile may optionally display a store/category image.

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The Category Link Display (outlined above in orange) appears below the Category Navbar. Tiles for all stores appear in this area.

To edit the display options for the Category Link Display, select the Category Link Display area on the Mall Branding tab. The Build Your Category Link Display options then appear.



Images can be turned on/off in the Category Link Display.

Choose **Yes** (default) to display store/category images in the store/category tiles on the home page. Choose **No** to *not* display store/category images. If store/category images are not displayed, the store/category name will still display so that customers can click on the store/category name to navigate to that store/category.

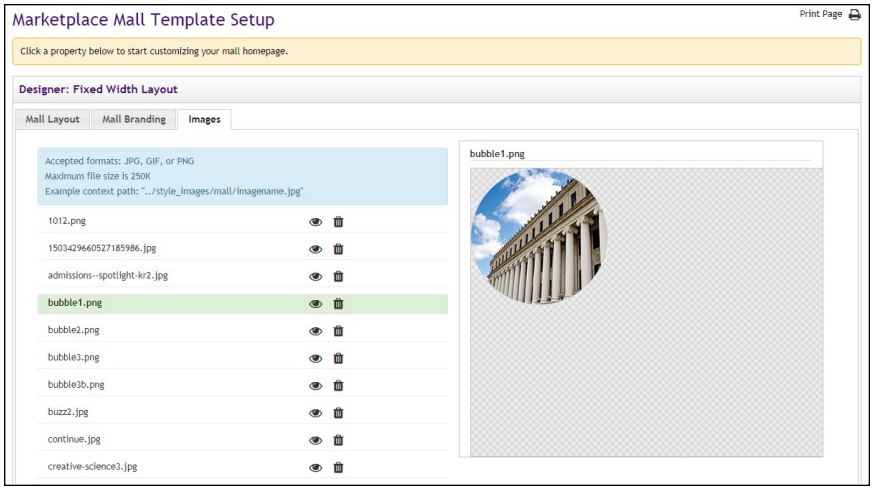
The store images (called Mall Storefront Tile Images) can be uploaded on the Store General Settings page.

The category image can be uploaded within the Administrative Product Category settings.

The Images Tab

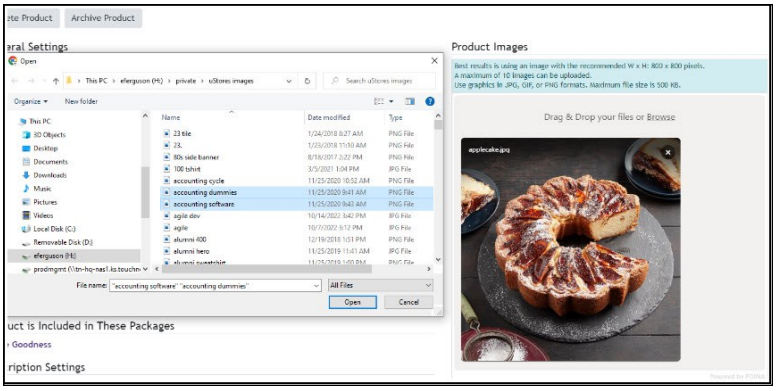
This tab allows you to upload, manage, and preview images. Functionality has been upgraded to allow administrators to drag and drop images into the product or to browse file folders to select multiple images for upload. These images can be used with fields that support HTML or CSS. Examples of HTML fields: Feature 1, Privacy Policy, Site Info, Help, and Accessibility link. Example of CSS field: Feature 1.

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In this example, a preview for the bubble1.png image is displayed.

To upload an image, select the Upload New Image button .The Marketplace Image Upload window then appears. Select the Choose File button to navigate to a local or network location and select an image. The image must be in JPEG, GIF, or PNG file format. The maximum file size is 500 KB.



Note: The same image uploaded has been implemented in the Template Setup sections of Marketplace Operations Center, but users are limited to one image per upload in these sections.

After an image is uploaded, it will be listed on the Images tab. You can view an uploaded image by selecting the View button for the corresponding image. The selected image will be displayed in the preview area on the right side of the Images tab.

You can delete an image by selecting the Delete button .

In order to use the images that you upload—using HTML that you entered in the "Custom Content" fields or CSS entered in the "Custom Styles" field—you will need to understand how to construct the image path.

Images can be referenced in HTML and CSS by using the following format:

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```
/[customer ID]_ustores/web/style_images/mall/[filename]
```

For example, if your customer ID is C99999 and the image filename is "sample.png", then the complete image path would look like this:

```
/C99999_ustores/web/style_images/mall/sample.png
```

Note: The customer ID is the same as the customer ID that you enter when you log in to U.Commerce Central. (For example, if you enter C99999.jdoe in the User Name field when logging in to U.Commerce Central, then your customer ID is C99999.)

Some browsers can also be used to help determine an image URL. To do this, select the View button for an image on the Images tab. Then with Firefox, for example, you can right click on the preview image and choose "Copy Image Location," or with Chrome, you can right click on the preview image and choose "Copy Image Address."

If you use a browser to determine an image URL, we recommend you do not include either https or the domain as part of the image path. For example, if your browser gives you the following image path:

```
https://secure.touchnet.net/C99999_ustores/web/style_
     images/mall/sample.png
```

Then you should use the following path in HTML or CSS:

```
/C99999_ustores/web/style_images/mall/sample.png
```

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.

The Fonts Tab

This tab allows you to apply custom font files to your uStores or uPay sites so that your stores and sites display with your school's custom fonts and branding. The Fonts tab is located in the Designer: Fixed Width Layout.

Using the Fonts tab, you can upload your custom fonts to create a font family. Once you have created and saved your font family, you can use it to create in your mall, store, or uPay sites.

Your custom fonts can be used in HTML and CSS for stores and sites.

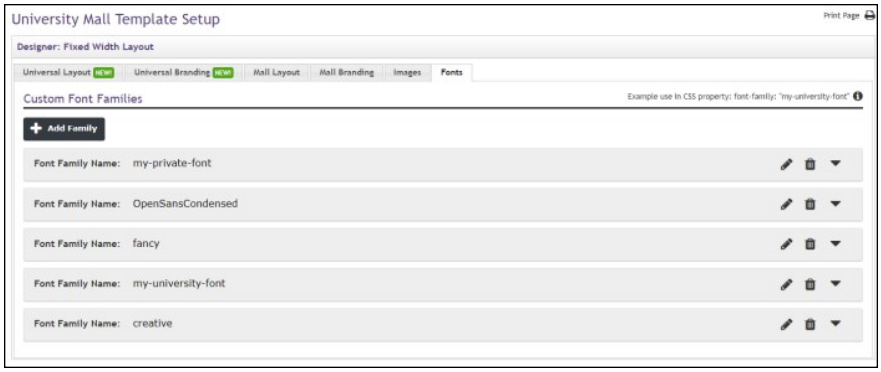
Important! uPay only configurations will still need to set up the mall uStores branding to allow custom fonts (they would not normally have to touch the Mall Template manager).

Accepted file formats include: EOT, OTF, SVG, TTF, WOFF and WOFF2.

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Adding a Custom Font Family

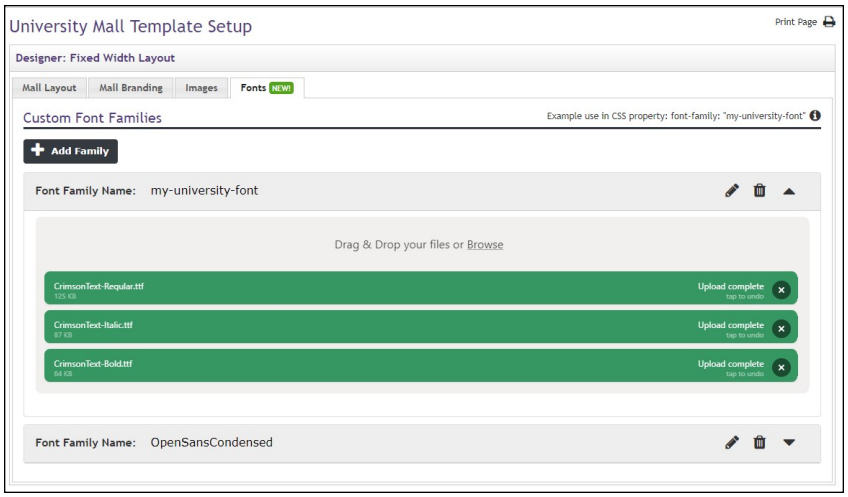
From the Fonts tab, you can add customer font families. To add a new font family, follow these steps.



The Fonts tab

1. Click on the Add Family button.
2. A new Font Family Name section displays for you to add your custom font family. Enter the name of your new font family in the Font Family Name field.
3. Save.

   Note: The edit option is enabled after you click Save.



Custom fonts added to new font family

4. You can either click and drag your font files in the space provided or browse for your desired fonts.

   Once you have added the desired fonts to your font family they display in the dropdown list. If the upload of your font was successful, an Upload Complete message displays to the right of the font.

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You are now ready to use your custom fonts when setting up your uStores and uPay templates.

Once your custom font family has been added and saved, you will be able to select your font family from the Mall Branding tab., Single Store Branding tab,

uPay Branding Tab

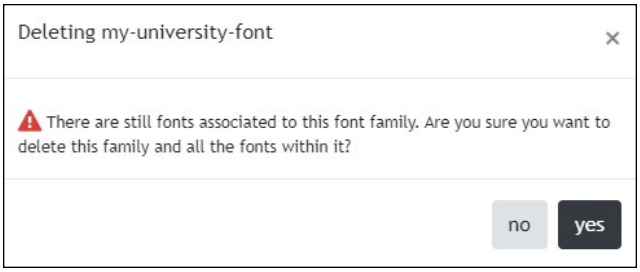
When the uPay Branding is accessed, your custom font family names appear in the dropdowns for Body Fonts, Headings (H1 - H6 heading fonts), and Footer Navbar fonts. Your font families can be entered in custom HTML and CSS for the uPay site content settings and Footer Navbar.

Removing a Custom Font

To remove a font from an existing font family, click the trash can icon The font is removed from the font family.

Deleting a Custom Font Family

To delete a custom font family, click on the trash can icon to the right of the font family name. A popup message displays confirming that you wish to delete the font family and all the fonts within it. If you want to proceed with deleting the fonts and the font family, click the Yes button. Your font family is deleted.



Warning message when deleting a custom font family

2.5 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.

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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	• 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 • Edit the Universal template • POS Supervisor role **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.

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User Role	What They Can Do
Administrator	• An administrator can do everything a chief administrator can, except add other chief administrators or other administrators.
POS Supervisor	• Manage attendant sessions via the Operations Center • Pre-populate email addresses during close and balance report send for and allow an attendant to email to a custom address • Require supervisor approval of attendant close and balance in POS application • View the current balances from the Operations Center when the attendant summary feature is enabled • View Session History • Close (or Close and Balance) Attendant in Marketplace Point of Sale (MPOS) • Close (or Close and Balance) Attendant via Operations Center • Reprint/Resend Balance report
Accountant	• Review the Revenue by Merchant report. **Note:** An accountant cannot make any changes to settings or assign user roles.
Merchant accountant	• Responsible for reviewing the Revenue by Merchant, Store and uPay level reports • Search for orders and view order history across all levels and uPay sites
Merchant manager	• 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

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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 108**.

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 223**, and for information about how to edit uPay site user roles, see **"Editing uPay Site User Roles" on page 576**.

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.

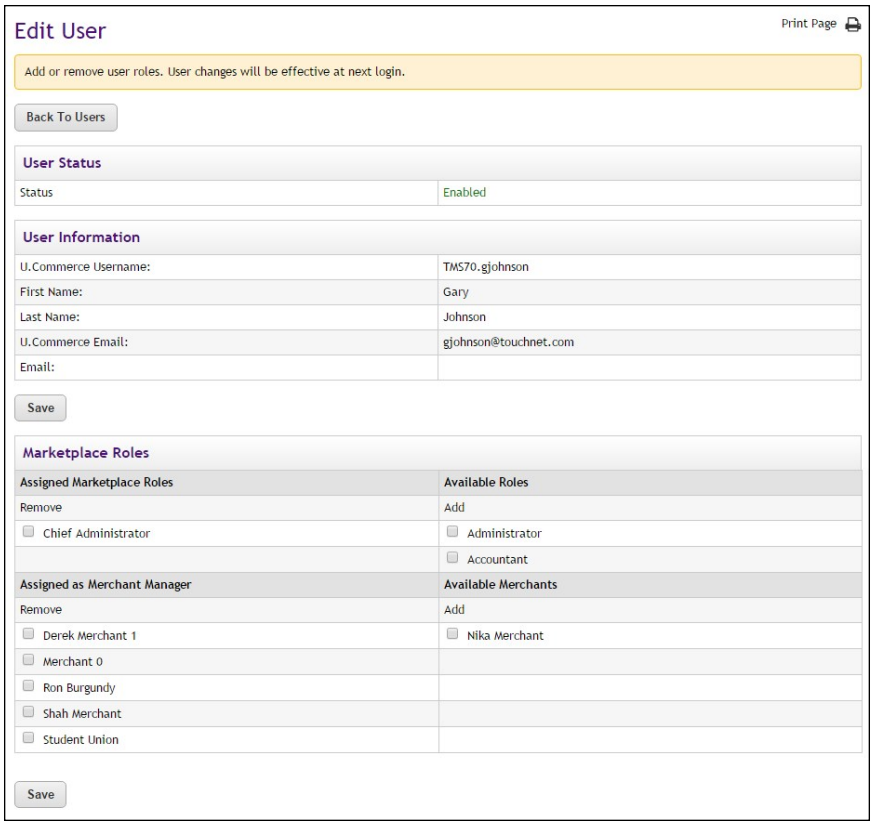
Chief administrators and administrators should follow these steps for editing users at the administrative level:

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.

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A checkbox for each merchant appears in the "Assigned as Merchant Manager" section.



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.

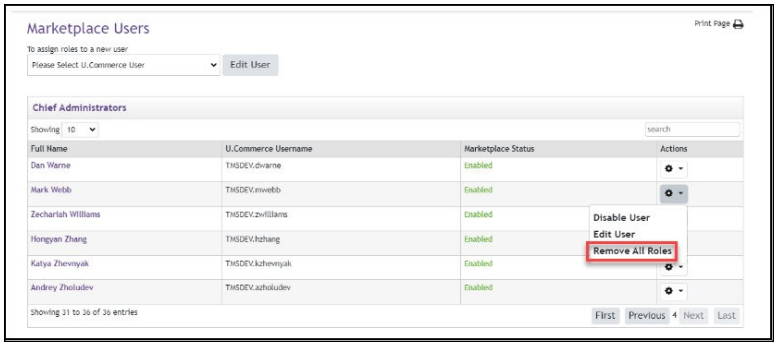
6 Click the Save button.

Chief administrators and administrators can also remove all Marketplace user roles from a user within the Marketplace Operations Center.

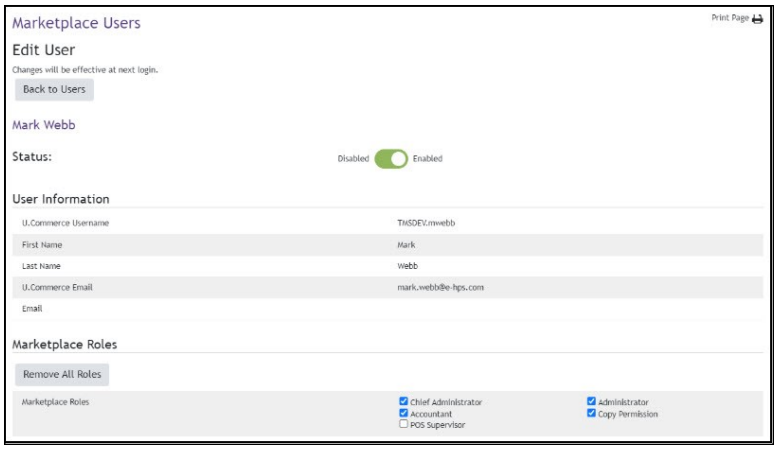
1 From the left navigation menu, navigate to Marketplace Home > System Administration > User Settings > Users. The "Marketplace Users by Role" page appears.

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2 Right-click on the gear wheel in the far right column of the user you want to update. A popup box appears with user options. Choose "Remove All Roles".



Note: The existing functionality at the Merchant, uStores and uPay Site levels for Merchant Managers, Store Manager and uPay Site Managers to remove all roles from a user with equivalent or lesser permissions is still present.



Adding Users to Exception Emails

This enhancement adds the ability for schools to configure who will receive emails with General Ledger or Posting Exceptions are encountered.

A new menu item System Administration > User Settings > Exception Notifications has been created that will allow at least one role (and up to five roles) to receive General Ledger or Posting Exception notifications. The default values upon installation will be Chief Administrators and Administrators. Updates can be made to include or exclude the Marketplace Accountant, Merchant Manager, Merchant Account and uStores or uPay Site Managers roles.

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:

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- **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 419**.

For instructions on how to to create a link from another campus application into uStores using group logins, go to **"How to Link to Marketplace with Group Logins" on page 425**.

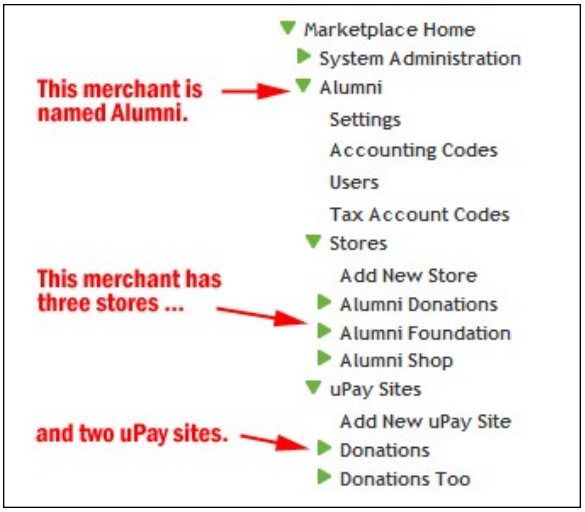
2.6 Merchants

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, return check fees, and more.

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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.

There are two administrative merchant roles -- the merchant accountant and the merchant manager.

Merchant Accountant -- Users assigned this role will be able to view Merchant, Store and uPay Site level reporting and order history for any merchant they are assigned to.

Merchant Manager -- Users assigned this role are responsible for maintenance of the merchant settings within the application.

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.

Additionally, there is a separate merchant accountant role. Users assigned this role will be able to view Merchant, Store and uPay Site Level reporting and order history for any merchant to which they are assigned.

In the sections to follow, we'll start with a discussion of how an administrator creates a merchant, discuss of how a merchant manager uses the merchant-level settings to maintain the merchant, and finally how a merchant accountant accesses reporting and order history.

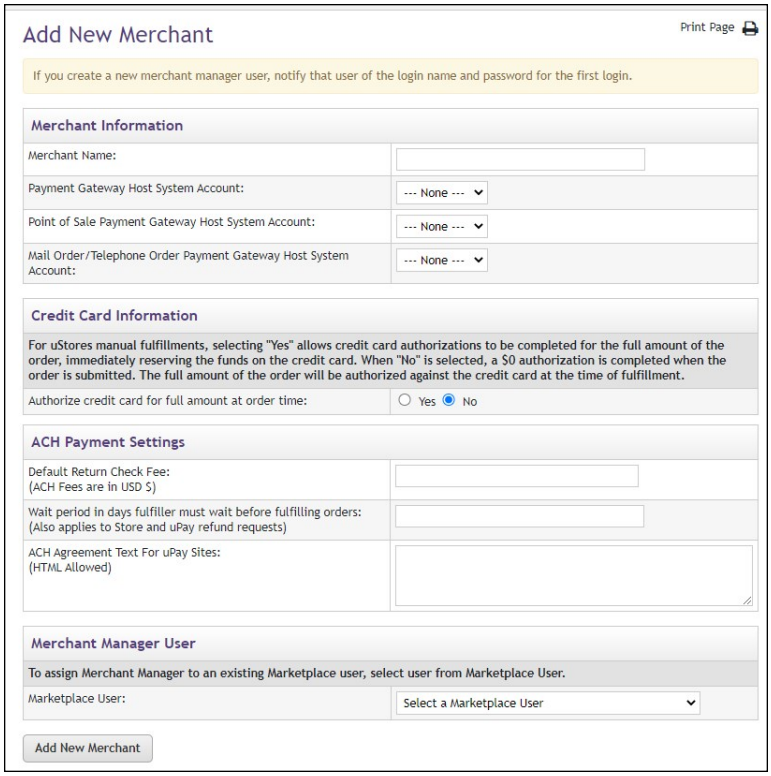
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Adding Merchant

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.



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. This name must be unique (i.e., it cannot be used by an existing merchant).
- **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 payment card processors, ACH processors, and banks).

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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.

- **Authorize credit card for full amount at order time**—(uStores and uPay) Selecting "Yes" allows credit card authorizations to be completed when the order is submitted for manual fulfillment orders. Use this option in order to encumber the customer's payment card for the full amount of the order at the time an order is submitted. By using this option, you determine if 1) the payment card information is valid and 2) sufficient funds are available.

  When "No" selected a $0 authorization is completed when the order is submitted. The full amount of the order will be authorized against the card at the time of fulfillment. The default setting is "No".

  Note: This change was made with Feature Pack 9. If your institution had previously selected "yes" for the authorize credit card at order time, that would still be the same with FP9. If your institution had "no" previously selected,with FP9 your default will be $0 authorization at order time. With the $0 auth at order time, the card or the payment amount will not be encumbered; this will only verify that the card number is valid.
- **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.
- **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.

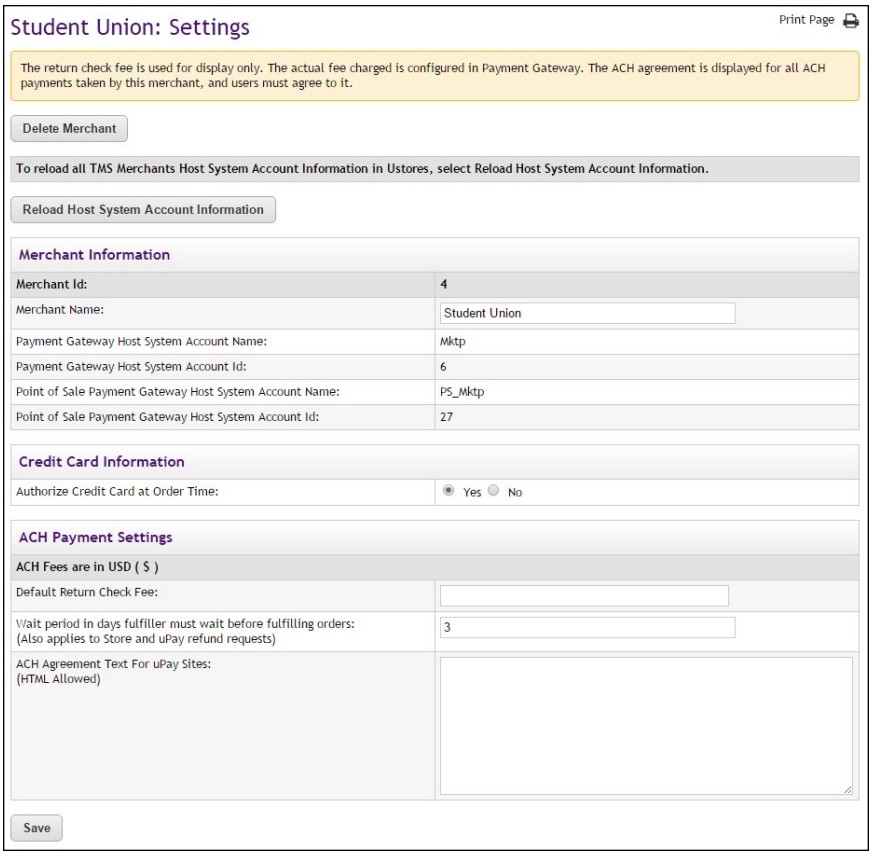
3 Click the Add a New Merchant button.

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.

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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 payment card at the time an order is submitted (during the uStores checkout process). By using this option, you determine if 1) the payment 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 payment 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

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ACH payment was rejected. Please consult your Payment Gateway administrator for an acceptable time period.

Note: As of Marketplace Version 7 Feature Pack 10 a standardized, default ACH agreement template based on NACHA requirements replaces any existing ACH agreements that your institution had created (via the Marketplace Operations Center).

The new ACH agreement will be configured in the TouchNet database.

Important! The new ACH Agreement will NOT be viewable with the Marketplace Operations Center. If the ACH Agreement needs to be modified, schools should contact TouchNet to request an update to their agreement. This removes the ACH agreement configuration steps from the Marketplace Mall (general settings) for uStores, as well as Merchant settings and recurring settings for uPay sites.

The ACH agreement will be stored by TouchNet each time a payer makes or schedules a payment, this allows for retrieval of the agreement from the TouchNet Payment Gateway.

ACH Agreements can be viewed during a preview of a uStore checkout.

Updates uStores to display the default ACH Agreement to the shopper during the checkout process. Shoppers are still required to give permission to draft from their account. Updates uPay to display the default ACH Agreement to the payer during the checkout process, including adding this step for TouchNet Ready Partner workflows. Payers are still required to give permission to draft from their account.

Building on the functionality release in Marketplace Version 7 Feature Pack 10, an update has been made to the Marketplace ACH agreements for recurring payment:.

1. New standardized, default ACH agreement template for recurring payments based on Nacha requirements.
2. The new ACH agreement will be configured in the TouchNet database.
3. The ACH agreement will be displayed to the end user (ex. student or authorized payer) during uStores and uPay transaction flows.
4. The ACH agreement will be stored by TouchNet each time a payer makes or schedules a payment, thus allowing for retrieval from the TouchNet Payment Gateway.

For uStores and uPay this text will include recurring payment product name, frequency, date of first payment, payment amount, date of last payment, total number of payments and total amount being paid if the information is available.

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- For payments with no end date the Date of Last Payment will show “Recurring until Cancelled” and the Total Number of Payments and Total Amount Being Paid will be omitted
- When multiple recurring payments are in a single cart for uStores, the recurring payment text will be repeated for each product in the ACH Agreement.

For uPay the text and exceptions will be the same with an additional exception for Partner Driven Recurring payments:

- Instead of a recurring schedule in the ACH agreement the following text will show “This payment is for a Ready Partner, please return to the partner portal for information on your payment schedule.”

For a majority of Marketplace’s schools the existing ACH Agreement will be updated in the database to allow for the recurring payment section. For any school that has customized their ACH Agreement a special script will be executed to ensure that the customizations remain in place.

In addition, the following changes were made to the Confirmation page of uStores:

- Product name in the Payment Information section is now a hyperlink that can be clicked upon to review the recurring payment schedule:
- Recurring Donations will now show as a single item in the shopping cart counter, as opposed to the total number of payments

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 Reload Host System Account Information button on the Merchant Settings page. For more information, see **"Updating the Host System Account" on page 117**.

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

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information by selecting the Reload Host System Account Information 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.

Archiving a Merchant

On the Settings page for each Merchant the Merchant Manager will see Delete and Archive options. The Delete option will be available if there is no order or payment history, pending fulfillments or recurring payments for the uStores and uPay sites contained within that merchant.

Users with the Merchant Manager role will be able to archive a merchant.

The Archive option will be available if there are no outstanding pending fulfillments or recurring payments for the uStores and uPay Sites.

Note: Administrators should not archive a Merchant if TouchNet Ready Partners, uPay or uStores have outstanding recurring payments or fulfillments or if refunds could still be issued (1 year from last order/recurring payment). Archiving a Merchant will prevent future recurring payments, fulfillments and refunds from being completed in Marketplace for any store or uPay site included in that merchant.

A merchant with uStores and uPay sites with no payment or order history, no pending fulfillments or outstanding recurring payment will see both the delete and archive buttons. Hint text will be similar to what appears in uStores or uPay.

If order or payment history exists the delete button will not be visible; if there are pending fulfillments or outstanding recurring payments the Archive button will be visible, but disabled.

Follow these steps to archive an existing Merchant.

1. From the left navigation menu select the desired merchant > Settings. The Merchant Settings page displays.
2. The Archive Merchant button appears at the top of the page.

   Note: The Archive link will remove the merchant and all associated uStores and uPay sites from the left menu, Marketplace home page and lists of available stores or sites for Template Importing or Copying (uStores only). The uStores and uPay site order/ payment history will still be available for reporting and advanced order searches.
3. Click the Archive button.
4. A popup window displays explaining this feature to the user. Click OK to continue archiving the Merchant.

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Note: If a Chief Admin or Admin clicks ok they will be forwarded to the new System Administration level Archived menu item with a success message. If a Merchant Manager clicks ok they will be forwarded to the Marketplace home page with a success message.

The new Archived menu item will appear at the bottom of the System Administration > Merchants menu, under View Merchants. This menu item will appear only when there are archived merchants. When accessed, this page will display archived merchant ID & name, by whom and when the site was archived and a Restore link. The merchant name will be a hyperlink that ,when clicked, will display the uStores and uPay sites archived with that merchant. All stores and sites included in the merchant will be disabled by the archival. The Restore link will allow the Chief Admin or Admin to restore the merchant, with all stores and sites in an archived status, should it be needed in the future.

Restoring an Archived Merchant

Use the Restore link If you need to restore a previously archived Merchant. The Restore link will allow the Chief Admin or Admin to restore the merchant, with all stores and site in an archived status, should it be needed in the future.

When the Restore link is clicked, the Merchant will be added back to the left menu and Marketplace home page. A success message will appear with links to the merchant settings.

Note: All uStores and uPay sites associated with the merchant will remain archived. Each store and site will need to be evaluated to determine if it should be restored.

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.

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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

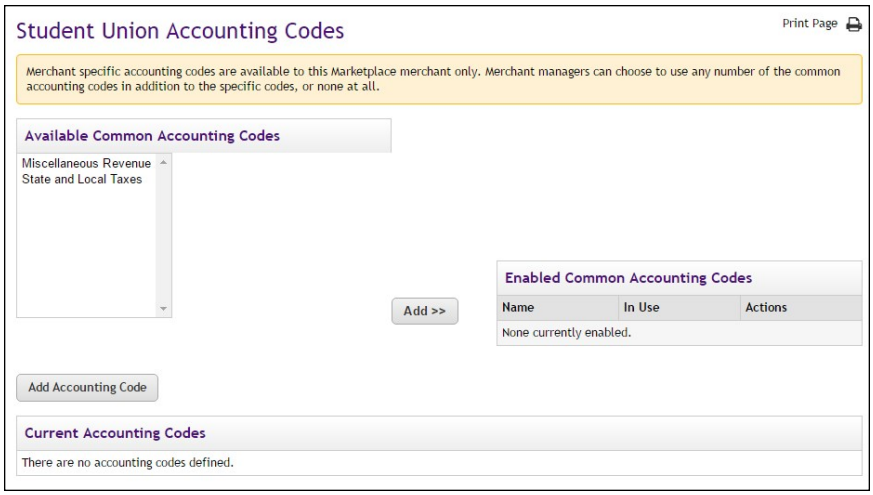
If you use general ledger options, you can create accounting codes in Marketplace that correspond to the accounting codes in your general ledger system.

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

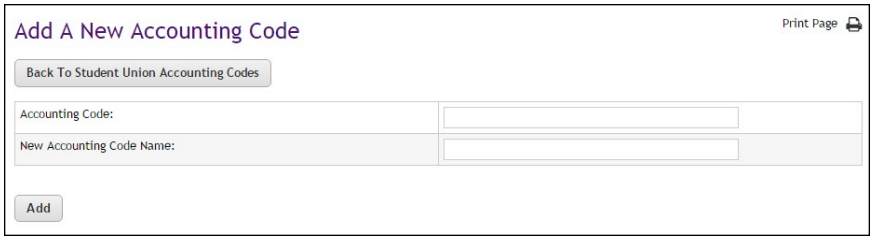
1. In the left navigation menu, go to Marketplace Home > [Merchant Name] > Accounting Codes. The Merchant Accounting Codes screen opens.



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.

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Note: The appearance of the Add a New Accounting Code screen will vary for some customers depending on their implementation of accounting codes.



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

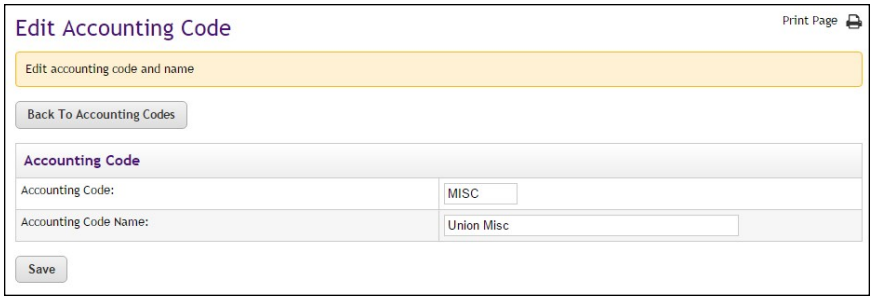
For more information about adding accounting codes, see the following sections: **"Setup for Banner by Ellucian" on page 611**, **"Setup for Colleague by Ellucian" on page 647**, or **"Setup for PeopleSoft" on page 669**.

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.

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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.

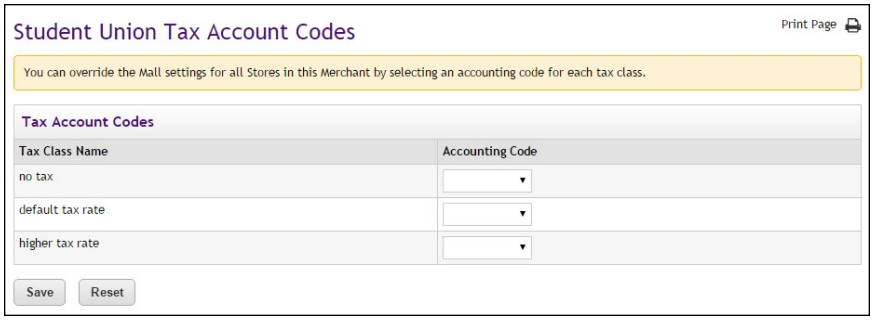
Merchant Tax Account Codes

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 120**. 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.



2 For each tax class, select an accounting code from the Accounting Code dropdown list.

3 Click the Save button.

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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 & Editing 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.

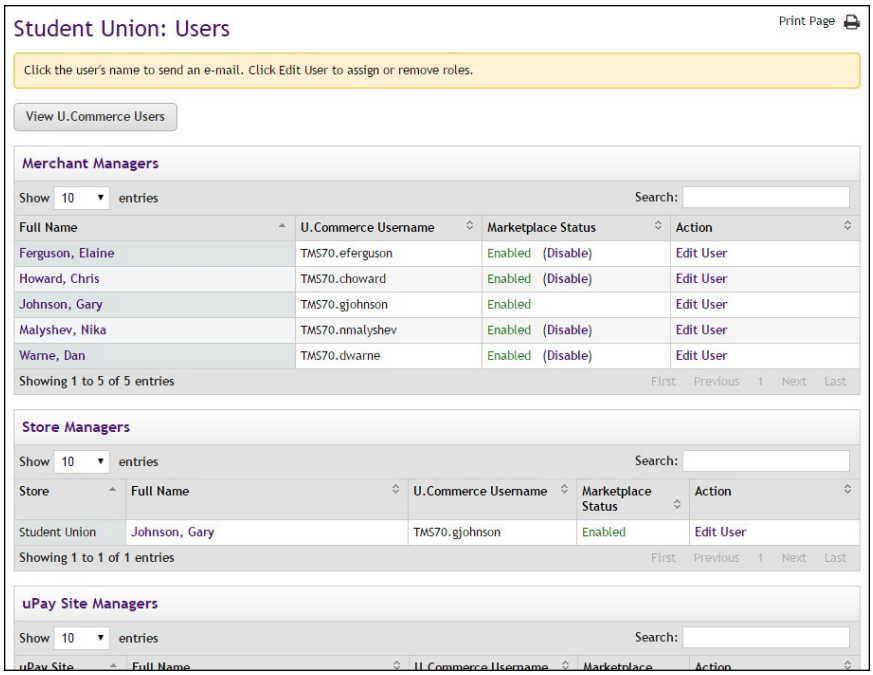
Typically, not all U.Commerce users will have access to User Management in U.Commerce, so you may find the duty of creating a new U.Commerce user will need to be handed off to a User Management administrator.

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.

1. From the left navigation menu, navigate to Marketplace Home > [merchant] > Users. The "Merchant Users by Role" page appears.

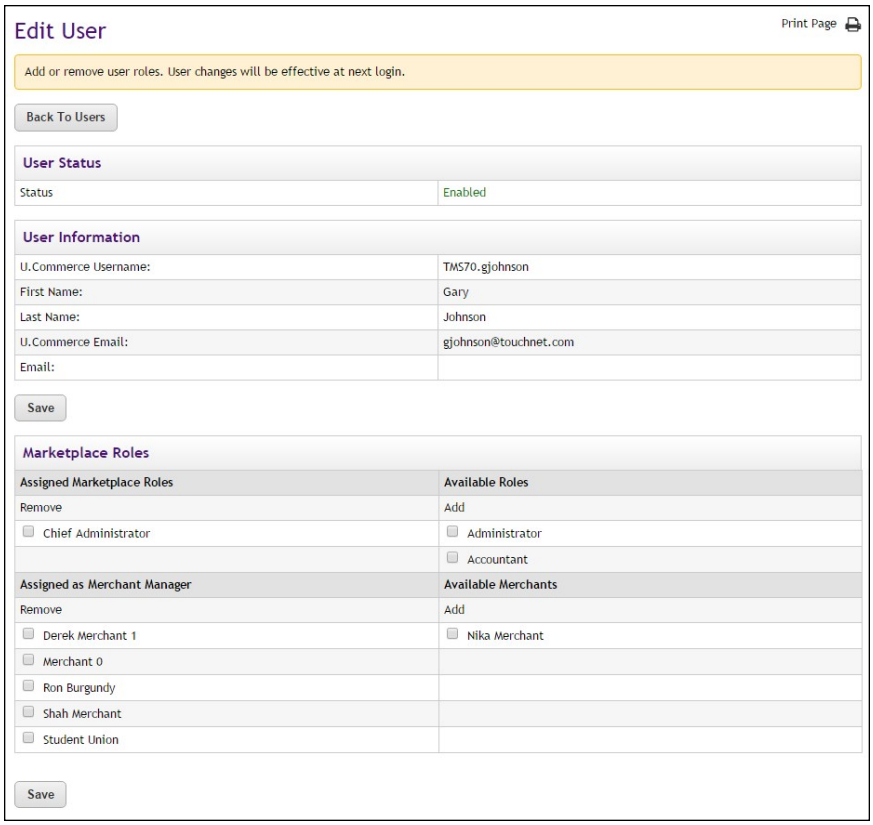
   This page will show users who have already been granted the merchant manager role (or the store manager role or the uPay site manager role).



2. Click the Edit User link in the Action column of the user you would like to edit. The Edit User page appears.

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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.



3 Select the checkbox for the merchant.

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

4 Click the Save button.

5 Notify the user that you have given them a new Marketplace role.

Adding and Editing Accountants

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.

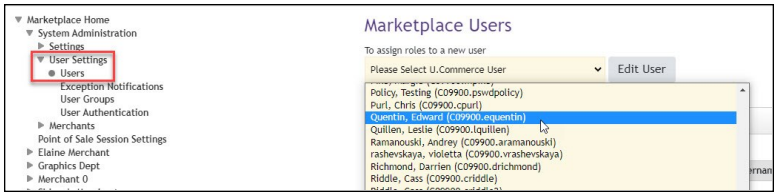
The Chief Administrator or Administrator can assign the merchant accountant role by following these steps:

1 From the left navigation menu, navigate to the System Administration > User Settings > Users menu item.

To assign roles to a new user select the user name from the drop

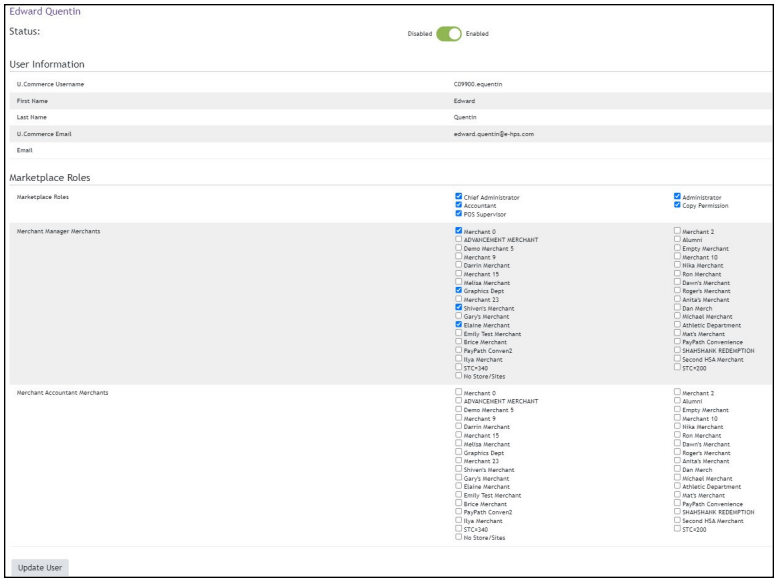
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down select and click Edit User. For a user with existing roles the Edit button can be clicked from the gearwheel to manage their roles.



2 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 Accountant" section and the name of the merchant for which you would like to name a merchant accountant.



3 Select the checkbox for the merchant.

4 Click the Update User button.

5 Notify the user that you have given them a new Marketplace role.

Merchant Accountants -- Accessing Merchant, Store and uPay Reports

When a user with the Merchant Accountant role logs into Marketplace Operations Center they will see a home page with Search functions, Stores and uPay Sites tables containing data for any merchant they have access to. The left menu will include links to the Merchant, Store and uPay level reports.

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3.0 Point of Sale Session Settings

The previous release of Marketplace Point of Sale introduced a new POS Supervisor role. In this new release, the role of POS Supervisor has been enhanced with even more configurable features along with the ability to manage open and closed sessions. The Point of Sale Session Settings allow for the configuration of cashiering session settings for all attendants and the management of open cashiering sessions.

Users with the Chief Administrator, Administrator and the new POS Supervisor roles will have access to the Point of Sale Session Settings menu option.

There are two tabs on the Point of Sale Session Settings page:

- Attendant Management Settings
- Attendant Sessions

3.1 Attendant Management Settings

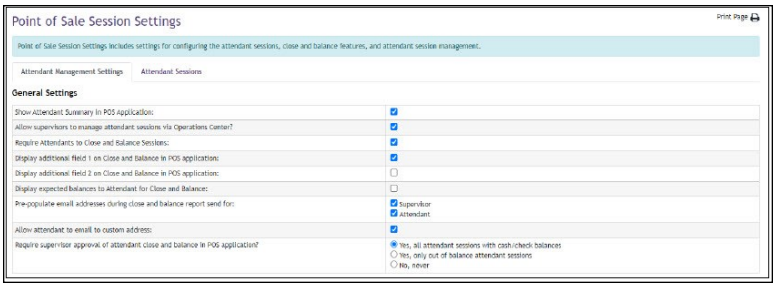
Settings on the Attendant Management Settings page control how the Attendant Summary (or Close and Balance) feature will be applied in the MPOS application. The POS Supervisor may turn on the Attendant Summary feature for all users in the general settings section. If a selected user should be exempt from this feature it can be turned off/on in the POS Attendant Settings section.

Supervisors are able to manage attendant sessions via the Operations center. This setting, when enabled, will allow Supervisors to see Attendant Session History, Attendant Balances for open sessions, Reprint or Resend Session Reports or to even close (or close & balance) an Attendant from the Operations Center. This setting will be defaulted off.

Selecting the "Pre-populate email addresses during close and balance report send for" option allows attendants to email to a custom address. These revised settings allow the POS Supervisor to designate who should receive a Close Report (POS Supervisor(s), Attendant or both). Additionally, these settings control whether an email entry field should be available to the Attendant to send to a custom email address. These settings will be defaulted to Attendant only.

The new "Require supervisor approval of attendant close and balance in POS application" setting allows for supervisor approval of a session as the Attendant is closing and balancing. If enabled, a POS Supervisor will have to enter their ID and password into the Attendant’s session for it to close. This setting will be defaulted off.

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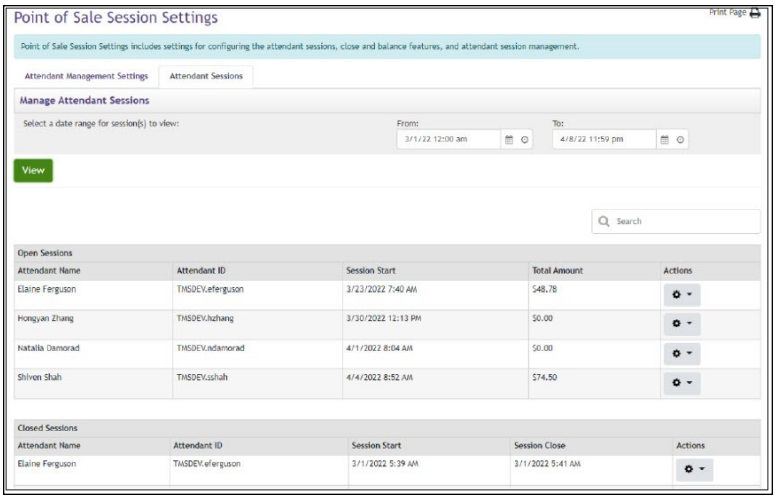


The Attendant Management Settings page

3.2 Attendant Sessions

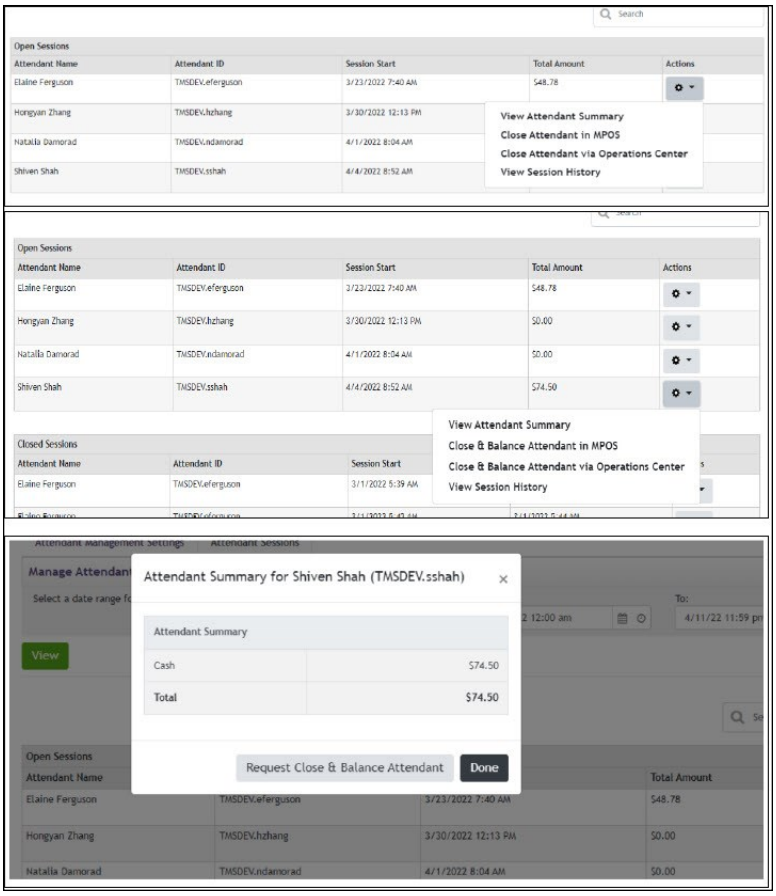
This tab allows a POS Supervisor to query open attendant sessions for balances. This tab also allows POS Supervisors to request an attendant close and balance a cashiering session.

From the Attendant Sessions tab, the POS Supervisor can see both open and closed attendant sessions for the specified timeframe.

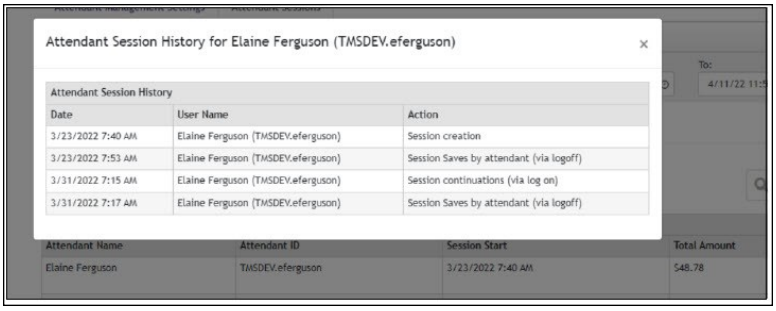


For open sessions, if the POS Supervisor is able to manage sessions from the Operations Center, a Supervisor will have options to view the current balances from the Operations Center. This option is available when the attendant summary feature is enabled. The modal will need to be refreshed to get updated balances.

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The "View Session History" modal will provide a summary of the actions completed on the session and when.

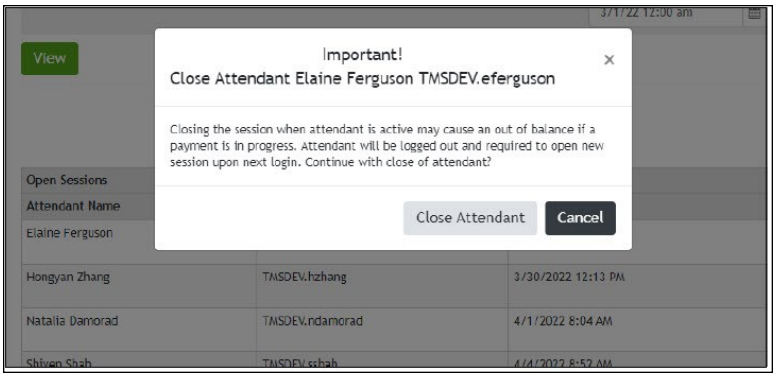


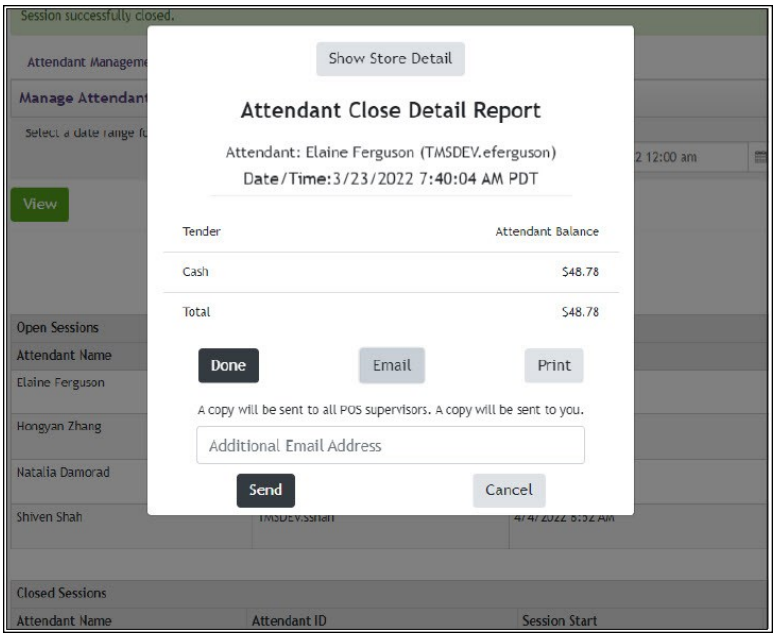
The "Close (or Close and Balance) Attendant" feature allows the POS Supervisor to request the attendant to close (or close and balance) their session. The Attendant will be prompted to do so upon next keystroke in the MPOS application (or at the completion of a pinpad transaction).

The "Close (or Close and Balance) Attendant via Operations Center" workflow option allows the POS Supervisor to close the session on behalf

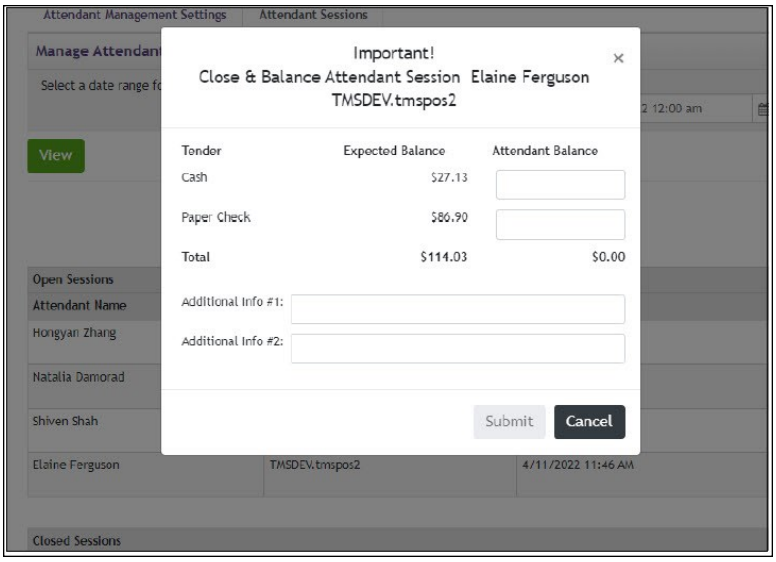
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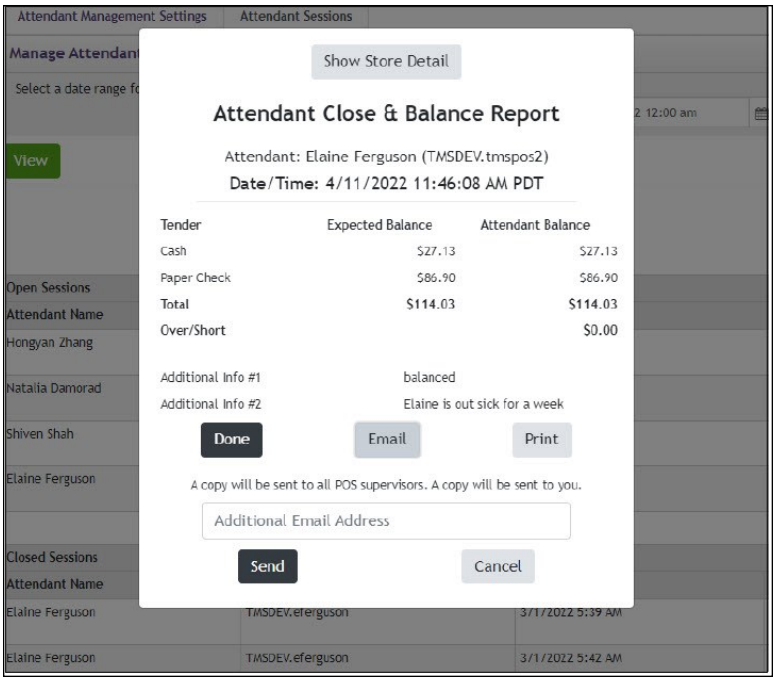
of the attendant via Operations Center. If an attendant is active (and in the middle of a pinpad transaction), this action could cause an out-of-balance to be encountered. TouchNet recommends that this action should only be taken when the attendant is not active in the MPOS application.



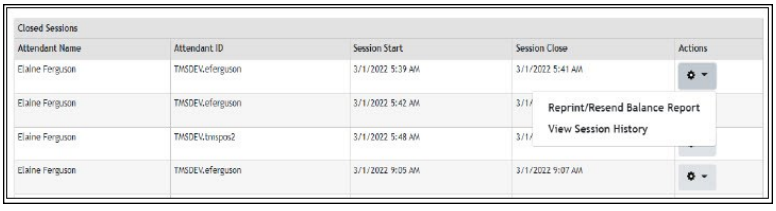


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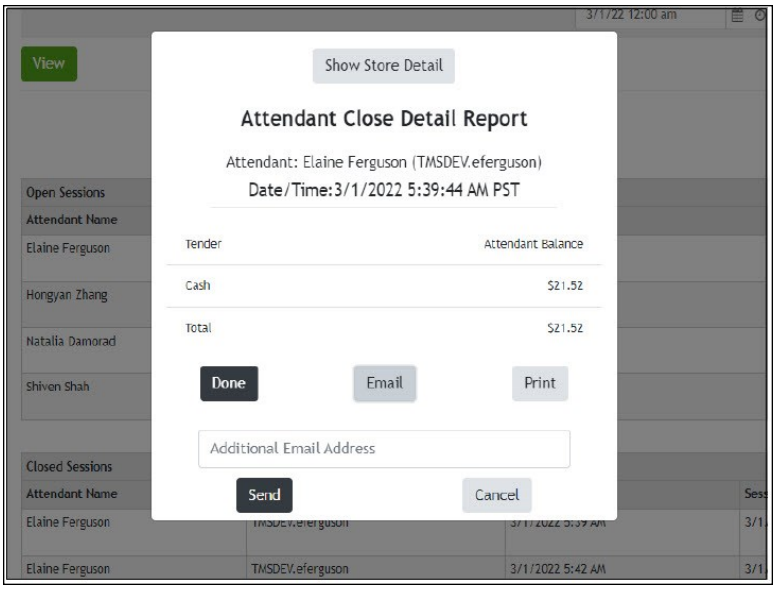


For closed sessions, if the POS Supervisor is able to reprint or resend the balancing reports or to view session history from the Operations Center:

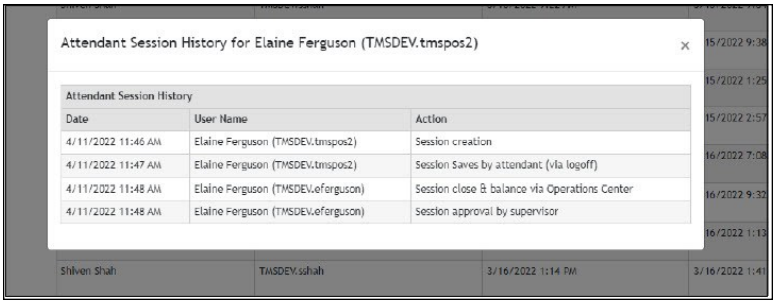


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With the "Reprint/Resend Balance report" feature, the POS Supervisor can enter an email address to send the report to or select to print to a local network printer.



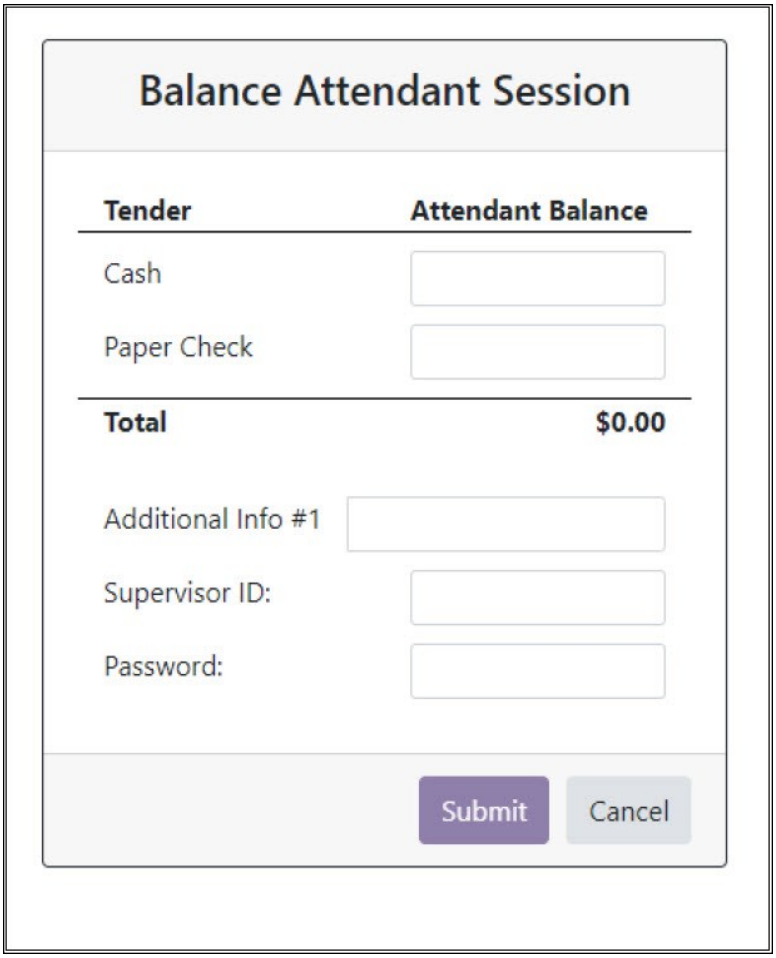
The "View Session History" modal will provide a summary of the actions completed on the session and when.



This feature allows a university to require supervisor approval of attendant sessions. Supervisors can choose to approve all sessions with cash/check balances, out of balance sessions or no sessions. When this feature is enabled and the Attendant is closing and balancing their session, the modal will be updated to show entry fields for Supervisor ID and password. This ID/password combination will be authenticated and checked to ensure the ID has proper authority (Chief Administrator, Administrator, or POS Supervisor roles). If an Attendant also has an Administrator role, this step will be skipped.

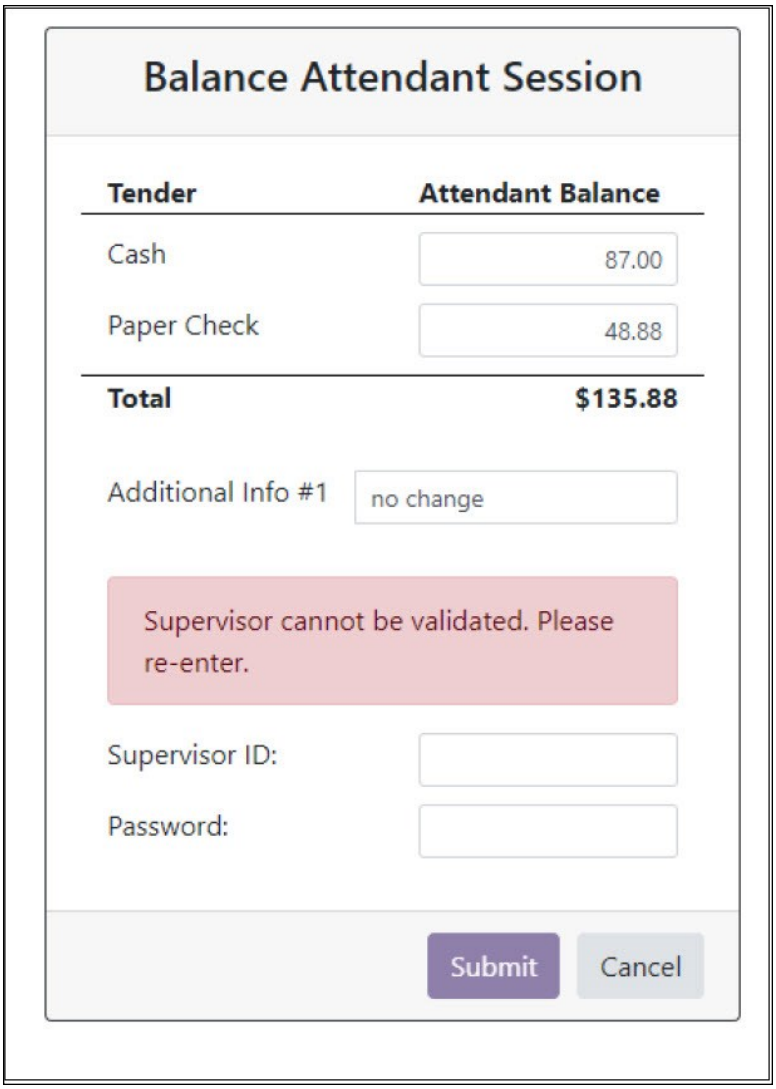
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The Attendant Session History will be updated with a line item for supervisor approval when this feature is enabled and the supervisor has successfully approved a close & balance.



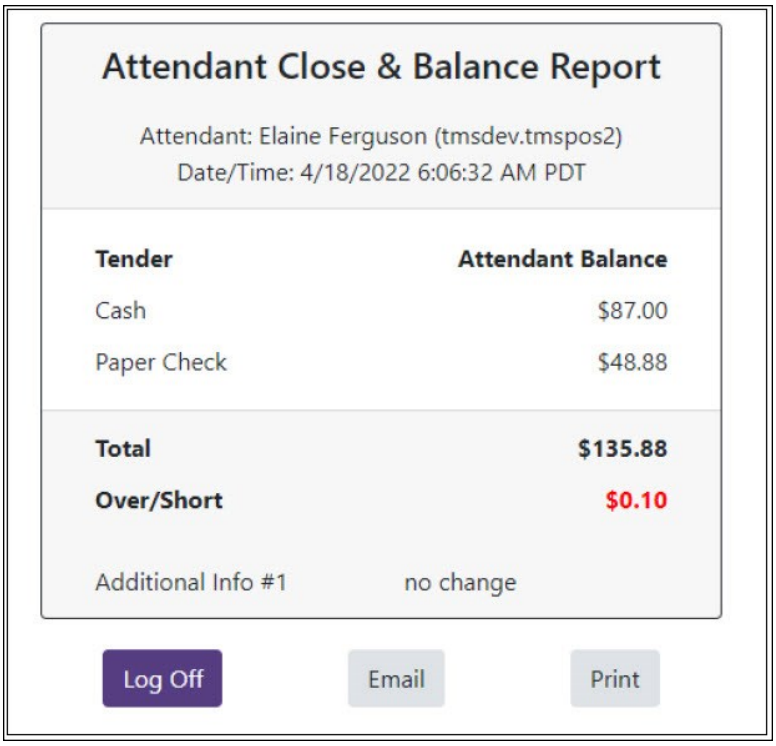
Close and Balance with Supervisor Approval

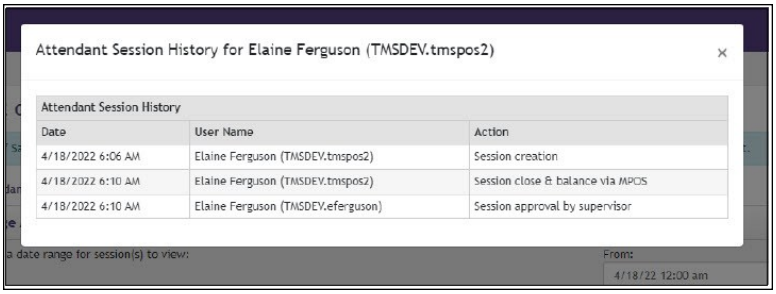
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Supervisor Error

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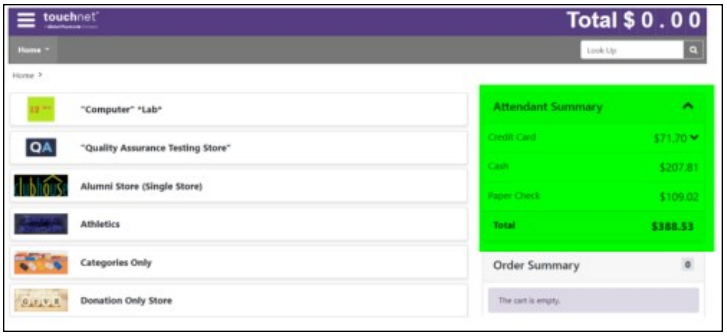


Session History with Supervisor Approval

Show Attendant Summary in POS Application Setting

When the "Show Attendant Summary in POS Application" option is selected (turned on) for an attendant, a closed Atendant Summary section will appear in the upper right corner of the Countertop page or can be accessed via the cash register icon in the Handheld application. The Attendant Summary will have revenue by payment method for that cashiering session. The MPOS application will record totals by payment method and store as transactions are completed for use in the attendant summary.

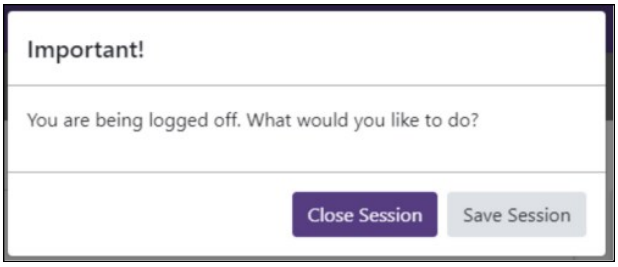
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The Attendant Summary

If an attendant times out of a cashiering session the summary detail will be saved and the user will be prompted to rejoin (or close) the session upon their next login.

When an attendant logs out they will be prompted to either close or save the session for later use.

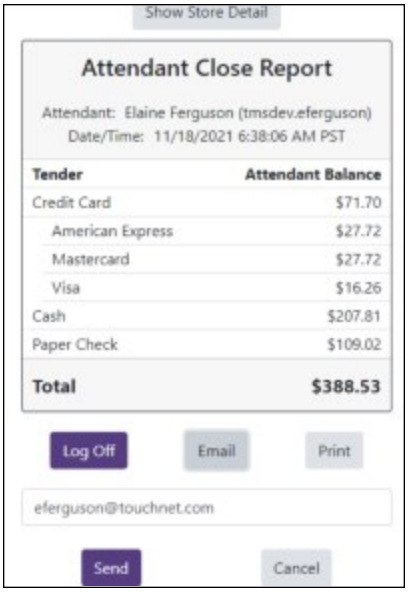


Attendant Session log off confirmation message

Attendant Closes Cashiering Session

When an attendant chooses to close a cashiering session they will be presented with a report of the revenues accumulated during that session. The attendant will be able to email or print the report. If "Allow Attendant to email copies during Close and Balance" is turned on, the attendant will be able to send additional copies to different email addresses (Supervisors, etc). If using a handheld device with a receipt printer, the report will print to the receipt printer. Otherwise the report will print to the local network printer associated with the device. Emailed reports look similar to the ones printed or displayed in the application.

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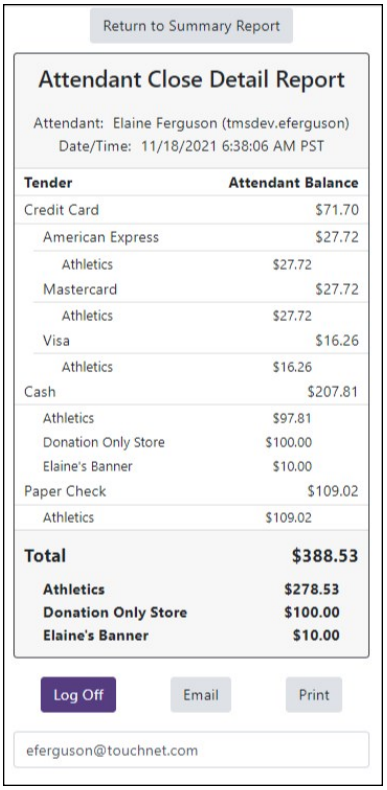
Attendant Close Report

A POS Supervisor may also prompt an attendant to close their session from the Point of Sale Sessions Settings > Attendant Sessions tab. In this scenario the attendant will be prompted to close the session (and log off) upon their next keystroke in MPOS. If the attendant is in the middle of a pinpad transaction they will be able to complete it before closing the session.

Displaying the Attendant Close Detail Report

If an attendant has taken payments for multiple stores during the cashiering session they may choose to display the detail report, with revenue broken out by payment method and store, as opposed to the summary report.

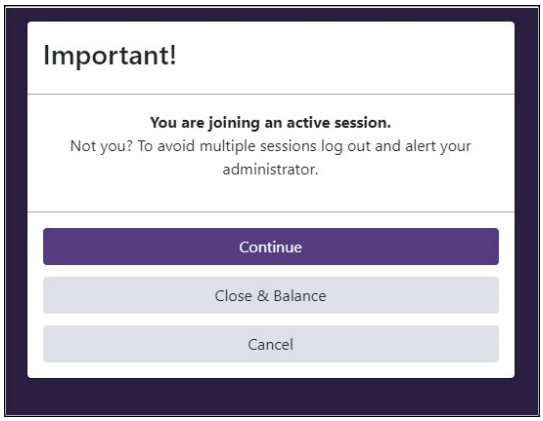
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Attendant Close Detail Report

Attendant Logs In

Similar to the Attendant Summary feature, when an Attendant logs in the application will check for an open session. If one is found the attendant will be prompted to rejoin the session, close and balance the session or cancel their log in.



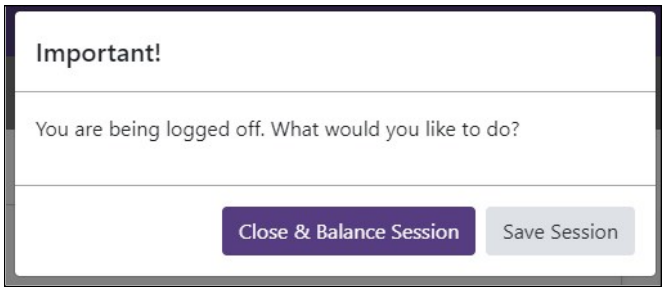
Attendant Close and Balance Log in

After logging in there are no changes to the user display (unless Attendant Summary is also turned on) until logoff. The MPOS application is recording totals by payment method and store as transactions are completed for use in closing and balancing the cashiering session. If an Attendant times out of a

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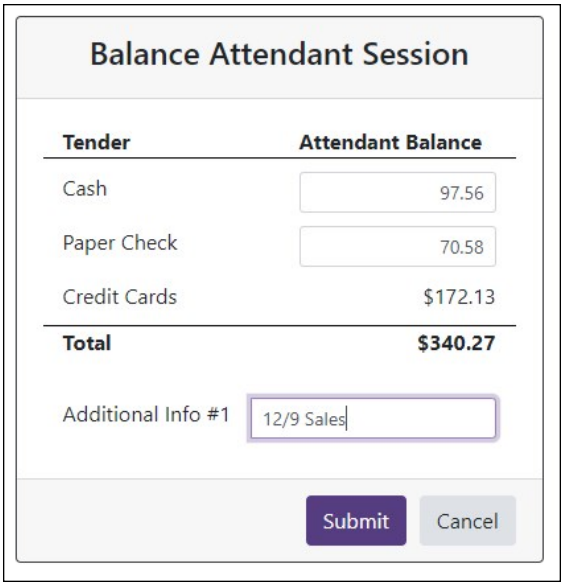
cashiering session the summary detail will be saved and the user will be prompted to rejoin (or close and balance) the session upon their next login.

When an Attendant logs out they will be prompted to either close and balance or save the session for later use.



Attendant Close and Balance Log off message

Based upon the configurations the Expected Balance, Additional Field 1 and Additional Field 2 data will or will not display.

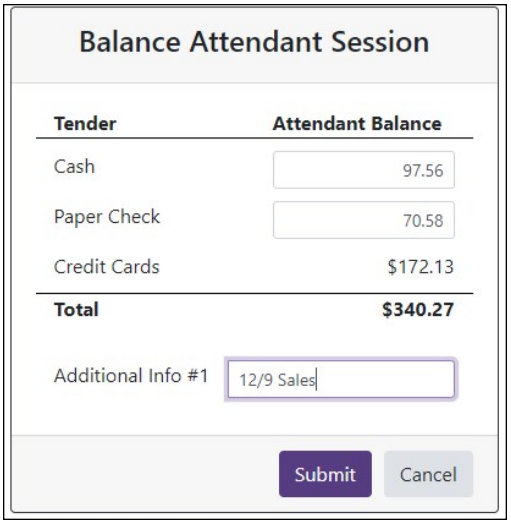


The Balance Attendant Session report

Attendant Closes Cashiering Session

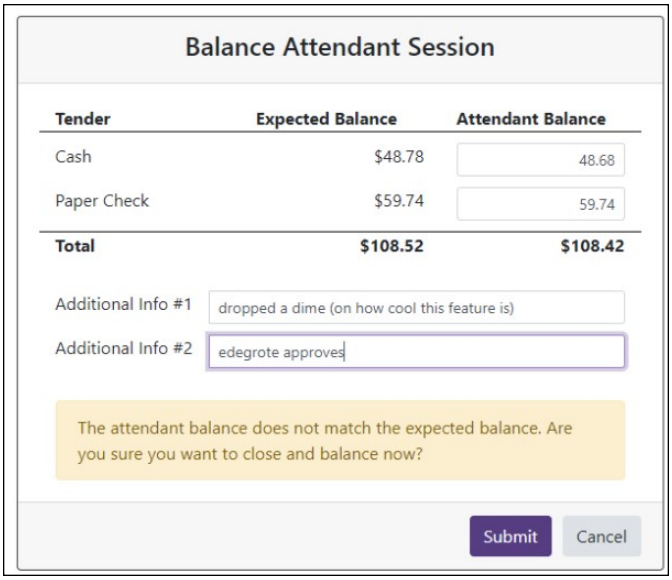
When an Attendant chooses to close a cashiering session, they will be presented with a Close and Balance view where they can enter the total of cash and paper checks taken during the session.

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Balance Attendant Session Report

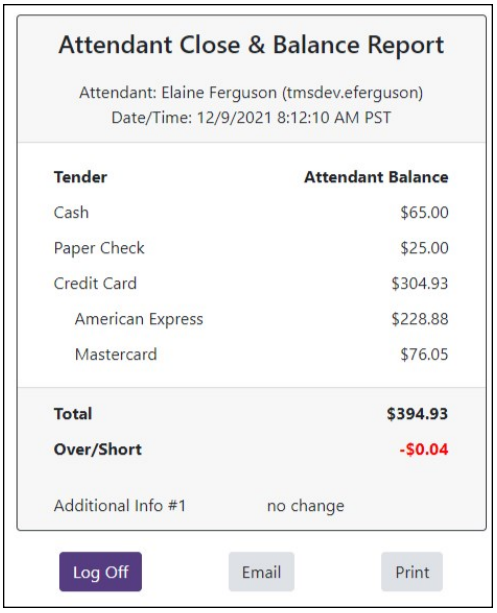
If out of balance upon submission, the MPOS application will prompt the attendant to correct or submit.



Attendant May Enter Cash and Check Amounts if Out of Balance

If no cash or checks have been taken during the cashiering session the Attendant will be taken directly to the Close and Balance Report. The Close and Balance report will display the revenues accumulated during that session, expected balances and additional input fields (if configured) and overage/shortage. The Attendant will be able to email or print the report.

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Attendant Close and Balance Report

Note: If using a handheld device with a receipt printer, the report will print to the receipt printer. Otherwise the report will print to the local network printer associated with the device. Emailed reports look similar to the ones printed or displayed in the application.

Note: The countertop version of MPOS can use a receipt printer (attached via POSC). The Epson T88V printer and the Move/5000 integrated printers are supported (when Point of Sale Controller is in use). Existing functionality that allows a receipt to be printed to a local network printer is still available. On the MPOS receipt page the application will check to determine if a printer is available via POSC. If there is a receipt printer attached to the station then clicking the print button will send a receipt to that printer. If there is not a receipt printer attached to the station then clicking the print button will send a receipt to the local network printer.

Attendant Taken Payments For Multiple Stores

If an Attendant has taken payments for multiple stores during the cashiering session they may choose to display the detail report, with revenue broken out by payment method and store, as opposed to the summary report.

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A Global Payments Company

Part 3:
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.

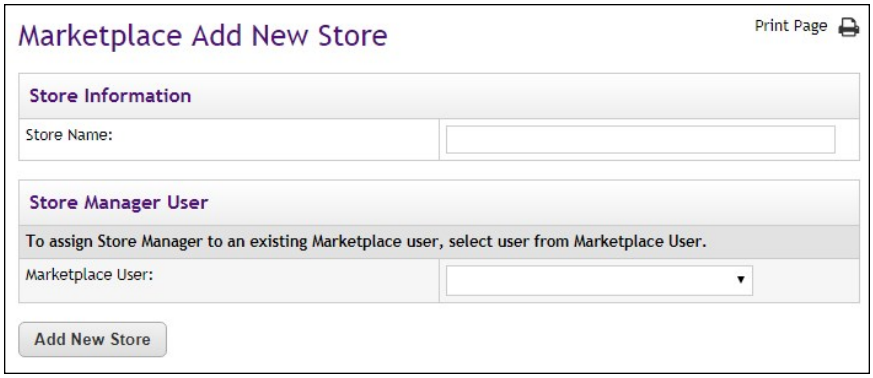
4.1 Adding a New Store

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.



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.)

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4 Click the Add New Store button. The store is created and the General Settings page appears.

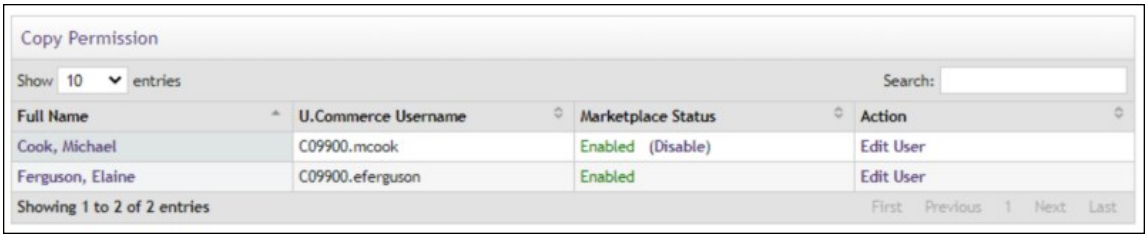
For more information about store general settings, see **"General Settings" on page 36**.

4.2 Copying New uStore Settings

With Marketplace 8, institutions now have the ability to copy store settings and template properties to another uStore within the same environment (i.e., within the production environment, within the test environment). This feature is for both new store creation and refreshes of existing stores.

4.3 Copy User Permission

A *Copy Permission* user permission has been added to the Marketplace User setup. This permission can be assigned to anyone with the Chief Administrator, Administrator, Merchant Manager or Store Manager roles for uStores. Users with the Copy Permission will be allowed to copy store settings from any store they currently have access to via their Merchant Manager or Store Manager
role(s). Assign the Copy Permission via the System Administration > Users menu, by editing the applicable user in the Copy Permission section.



The Copy Permission section of the Edit User page

4.4 Adding a New Store with Copy Permission

The Store Content section on the Marketplace Add New Store page allows users with the copy permission to select the copy settings option.

Notes about Users with Copy Permission

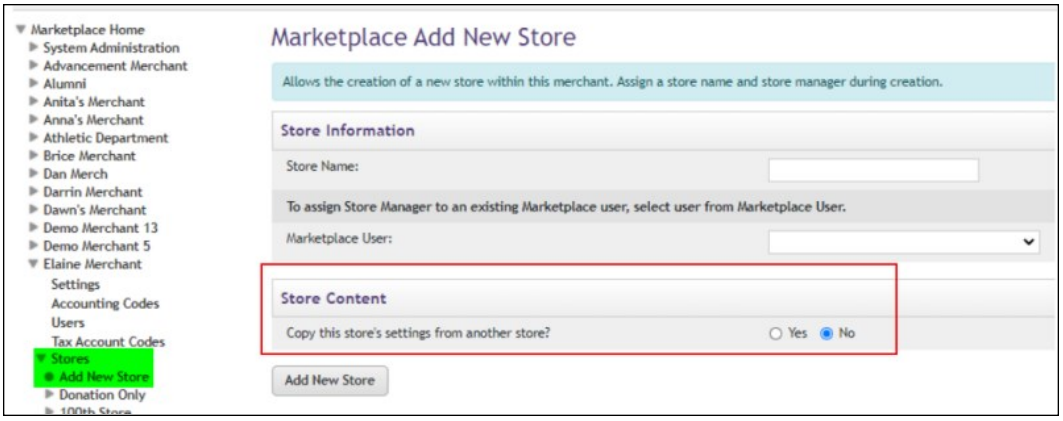
- If the user does not have copy permission the Store Content section will not display; store creation will be the same as it is today.

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- If the user has the copy permission but does not have access to any other store or merchant the Store Content section will not display; store creation will be the same as it is today.

To copy the store settings for a new store, 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.



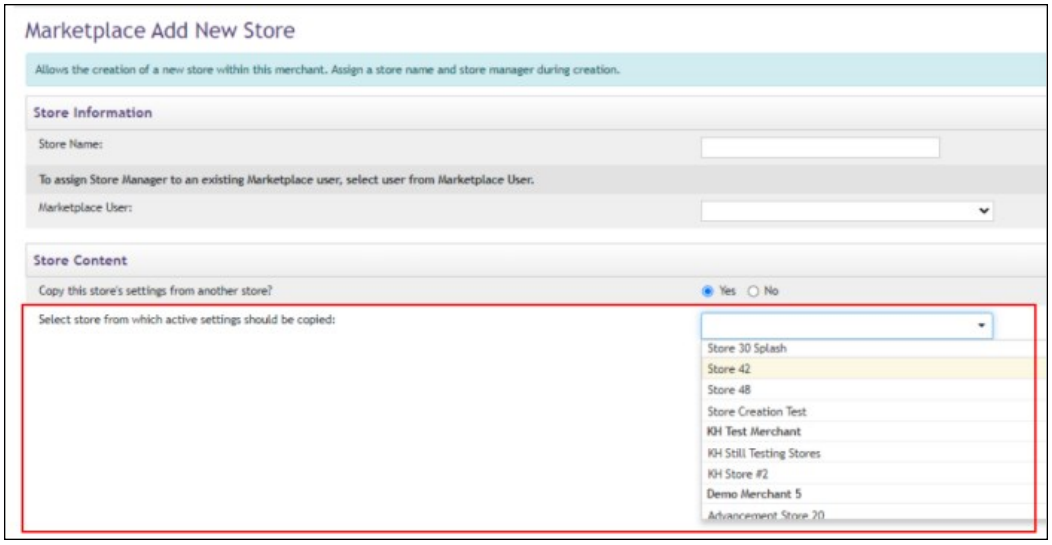
The Store Content section

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. In the Store Content section, select the Yes radio button to copy the new store's setting from another store.

   Note: If No is selected, you will be able to add a store using the Marketplace default settings.

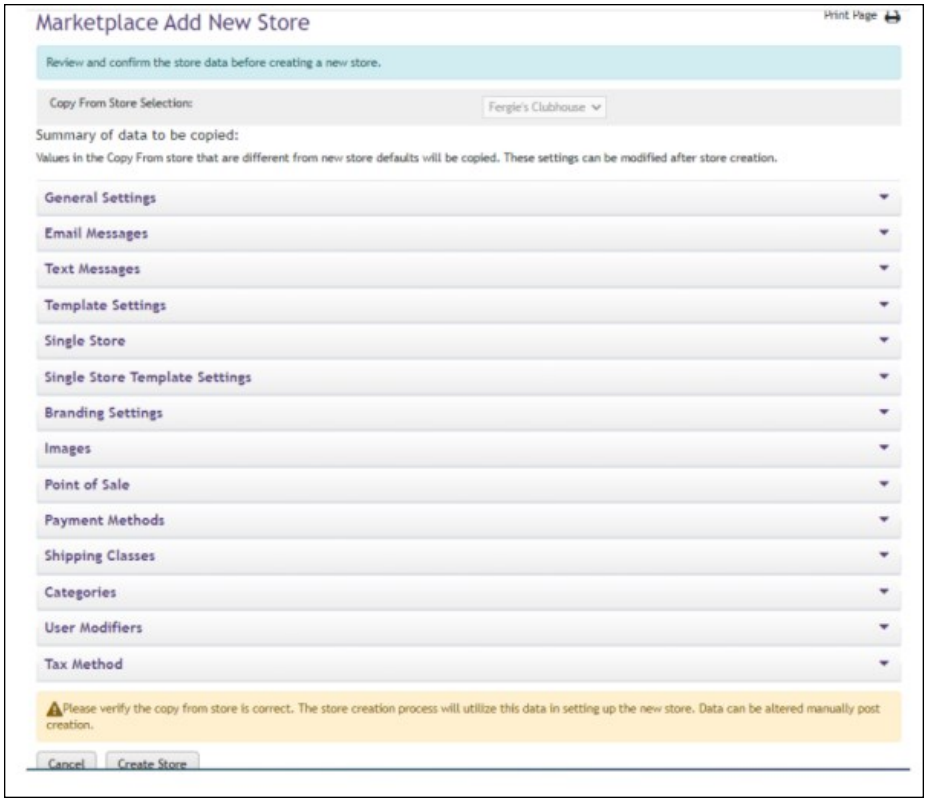
5. If Yes is selected, the "Select store from which active setting should be copied" field displays. Click the dropdown arrow to display the menu of all the existing stores you are currently authorized for. If you are authorized for multiple merchants, you will see the merchant name and the stores under that merchant. You can copy within a merchant or across merchants if you have permission.

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Select the applicable store from the dropdown list

6 Select the "copy from" store from the list. A Confirmation page displays.

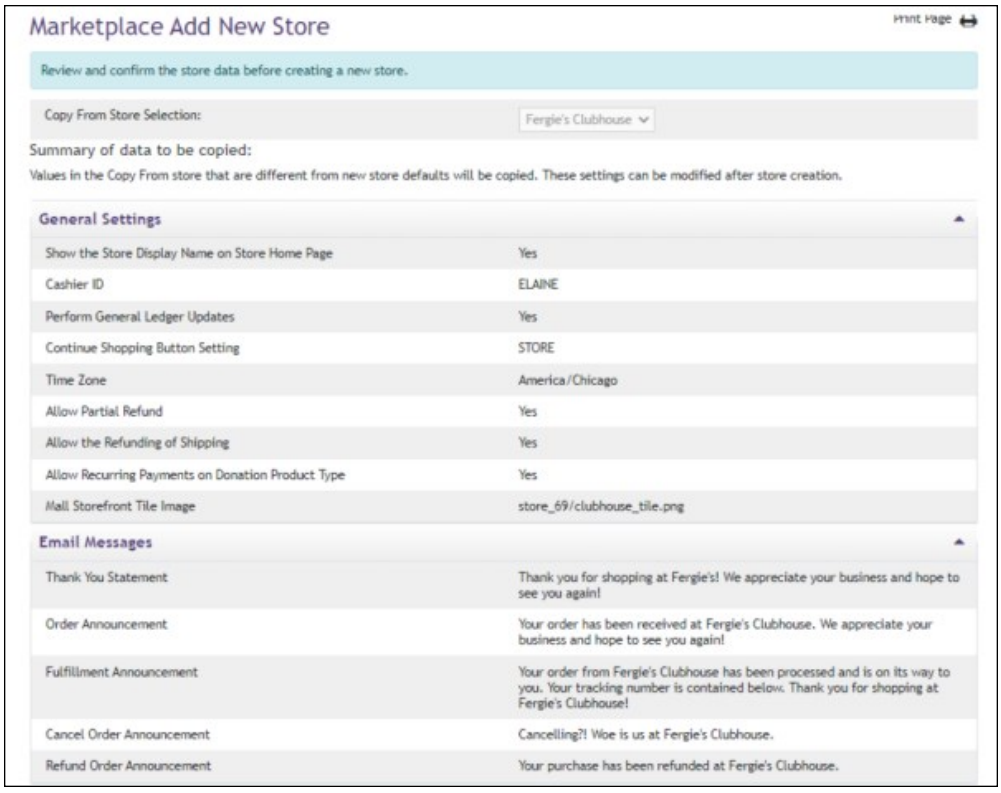


The Copy From Store Confirmation page

The confirmation page has a summary of data, different from new store defaults, that will be copied from the chosen store. Each menu

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section that has differences is listed on this page and is expandable by clicking on the dropdown arrow. The page can also be printed.



The Confirmation page with the General Settings and Email messages expanded

The following table lists the guidelines related to what store settings information ***will*** or ***will not*** be copied for a new store with the copy feature selected:

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Yes, this setting is copied	No, this setting is NOT copied
• General Ledger accounting codes (if the accounting code is enabled in the "copy to" merchant) ***Note:*** If "copy to" merchant has not enabled an accounting code, the store settings will still be copied but a warning message will be displayed. General Ledger will be disabled for the new store.	• Authorized Groups>Groups Allowed • Note: Each store will be setup with the default store (aka everybody) group, administrators will need to enable any additional groups (registered users, etc.)
• All general settings will be copied, except for the following: ○ Store Name and Store Display Name ○ Digital file space allocations (space will need to be allocated to the new store via the System Administration > Setting > Digital File menu option. ○ Mall level store category assignments (could be unique to each store) ○ QR codes (could be unique to each store)	• Users
• Status Management outage messages ○ Stores will always be disable for Web and Point of Sale ○ Schedules will not be copied	• Order history
• Images	• Products and Promotions
• All email messages	
• All text messages (if text messaging is turned on for the mall)	
• All Single Store settings	
• All Store Template settings (this includes layout, branding and images) **Exceptions:** if a Hero image is linked to a category or product, the category or product value WILL NOT by copied. Hero image links WILL be copied.	
• All Point of Sale settings	
• From the Authorized Groups menu, the Single Sign On and Non-member setting **Exception:** Allowed Groups will NOT be copied.	
• Payment Methods for the store default group Payment Settings and Invoice Me Alternate Name WILL be copied (if those payment methods are available) **Exceptions:** Group Payment Methods and Product Specific Payment Methods will NOT be copied.	
• All Shipping Classes/Delivery Methods	
• All Categories, but NO products will be assigned to them. ○ Within the Category the layout, images, and announcements WILL be copied ○ QR codes will NOT be copied (these are unique to the store/category combination)	
• All User Modifiers	
• All Tax Method settings	
• All Tax Account codes	

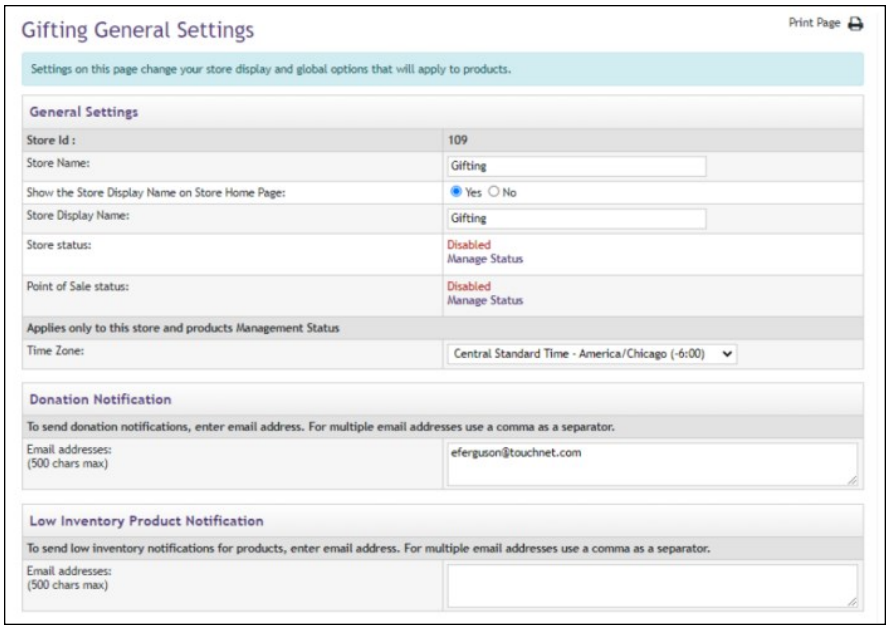
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7 Once you have verified all the information to be copied, click the Create Store button at the bottom of the page to create the new store. The new store is created and the General Setting page for the new store displays.

Important! The new store will be always be created in Disabled status.

New Store General Settings Page

When the new store has been successfully created, the General Settings page displays.

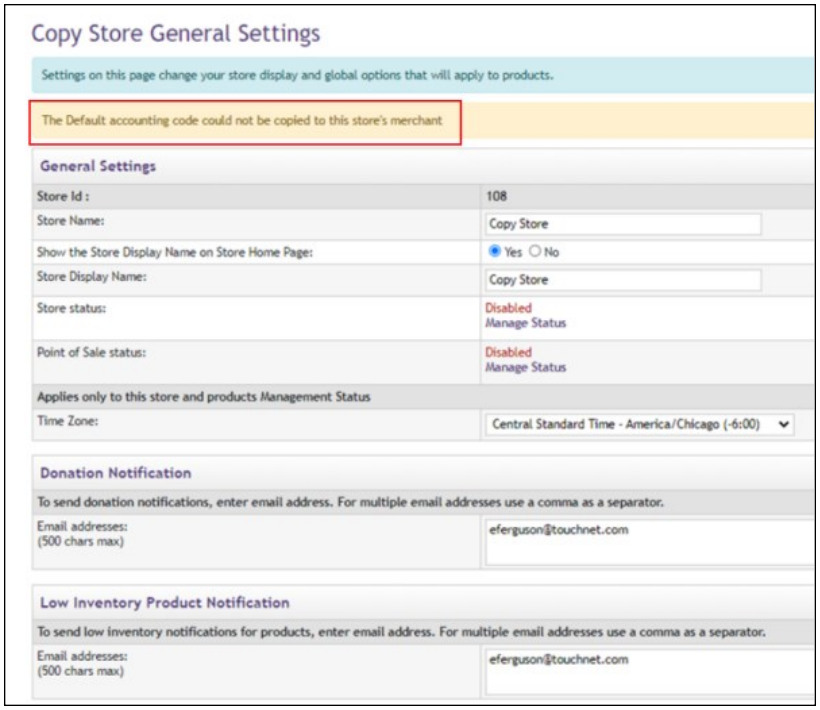


The General Settings page when the store copy was successful

Store Copy Exceptions

There may be times when Warning messages may appear at the top of the General Settings page if an issue was countermand that allowed the store to be copied, however specific settings (i.e., General Ledger settings) could not be copied.

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The General Settings page with a warning message displayed

If the store copy fails, a red error message will display on the Add New Store page.

You should review the settings copied and update them as necessary. Once products have been added, the store can be enabled.

4.5 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 236**. Without at least one shipment class, products cannot be added to the store.

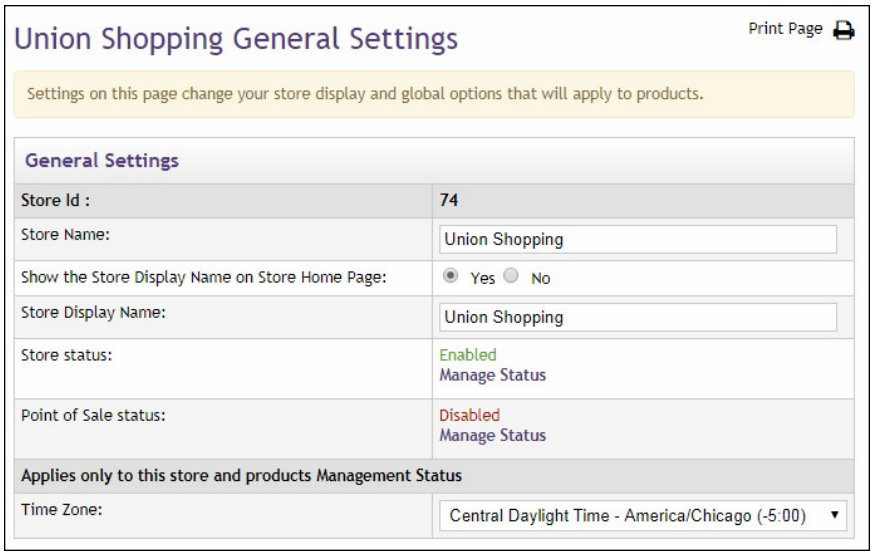
To view the Store General Settings page, make the following selections in the left navigation menu:

General Settings

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Navigate to Marketplace Home > [merchant] >Stores > [store] > Store Settings > General.

The Store General Settings page then appears.



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 272**.

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.

Show the Store Display Name on Store Home Page

By default, the Store Display Name will appear as a text heading on the store home page. However, in some situations, a store manager might want to choose No for this field. For example, if the store includes the store display name as part of the store's hero image, then the store manager might consider display of the store display name in a text heading field to be redundant.

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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 Status

WIth Marketplace Version 8, Feature Pack 2, this field now includes a preview link that gives you the ability to preview the store from the General Settings page. (Previously, you could only preview the store from the Marketplace home page. Using this link, opens the preview in a separate window. ou are now able to This field will say Disabled, Enable. 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 163**. The View Store option is also available on the Store Status Management page.

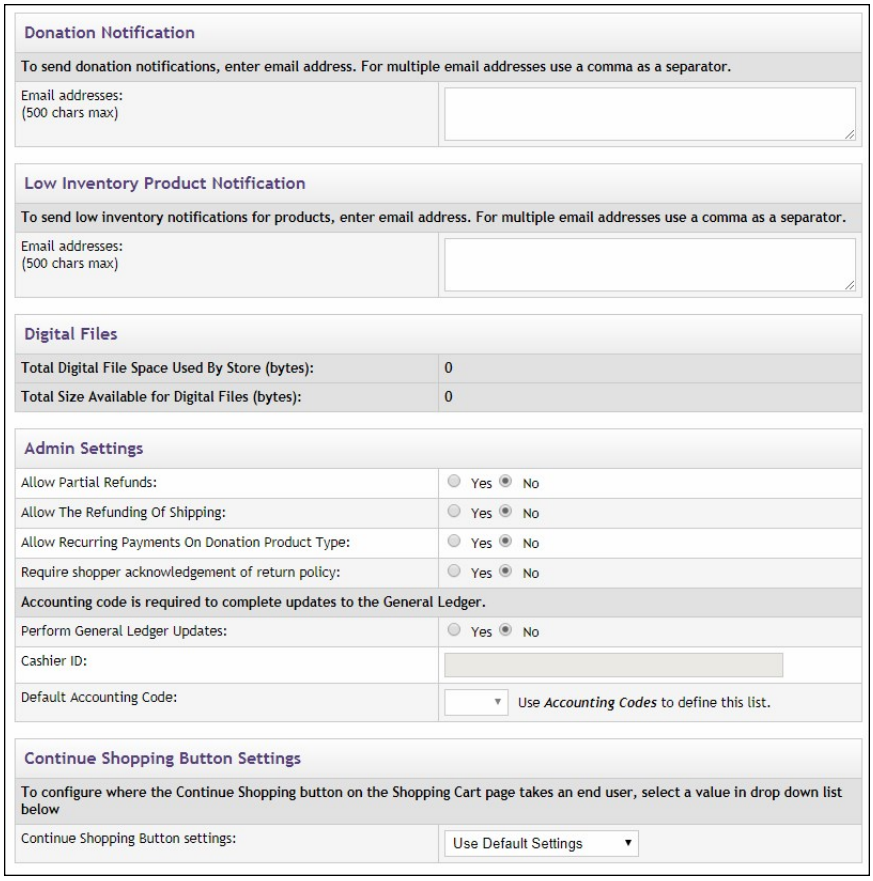
Stores in preview mode are not available for shoppers. Once a store is placed in preview mode, it can only be reached by using the preview link on the Store General Settings page.

Time Zone

Select the time zone that should be used in conjunction with the enabling and disabling of the store and its products. This time zone will also be used with scheduled price changes for products. Be sure you choose a time zone that is appropriate for the business location.

The default time zone for each store is determined by the Time Zone selection in the General Settings page of the the System Administration settings.

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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. This field accepts a maximum of 500 characters.

When you set up a donation page, the product name will be listed in the Subject line of the outgoing email. Previously the word "Donation" was listed in the Subject line.

Low Inventory Product Notification

Email addresses

You can enter a list of e-mail addresses in this field. When a product that is configured to send a "Low Inventory Notification" reaches the configured inventory quantity for that product, the "Low Inventory Notification" is sent

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to the e-mail addresses entered in this field. Use a comma to separate these e-mail addresses.

The e-mail addresses entered in this field are used with Low Inventory Notifications for all products in this store. This field accepts a maximum of 500 characters. See **"Editing Products" on page 306** for more information about configuring products for Low Inventory Notifications.

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 63**. 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 Refunds"**.)

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.

Require shopper acknowledgement of return policy

Once this setting is turned on, a checkbox appears on the Confirmation page of the payment process. This checkbox says “By checking this box, you are agreeing to the Return Policy Agreement.” This configuration setting was added to fulfill a Visa/Mastercard regulation regarding return policies. Display of this checkbox is optional.

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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 609 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 623**.

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 658**.

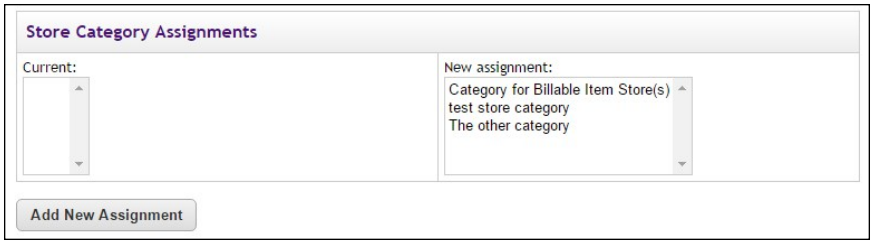
Default Accounting Code
If you select the "Perform General Ledger Updates" checkbox, you must make a selection from the Default Accounting Code drop-down list. This field lists all the accounting codes that are available for this store to use. For more information, choose your general ledger system: Banner, Colleague, PeopleSoft, or Workday.

Continue Shopping Button Settings

Continue Shopping Button settings
This setting determines what will happen when the customer selects the Continue Shopping button at the conclusion of the checkout process. Three choices are available:

- **Navigate to Product Page**
- **Navigate to Store Page**
- **Use Default Settings**

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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 43**. Store managers then select the appropriate categories for their stores.

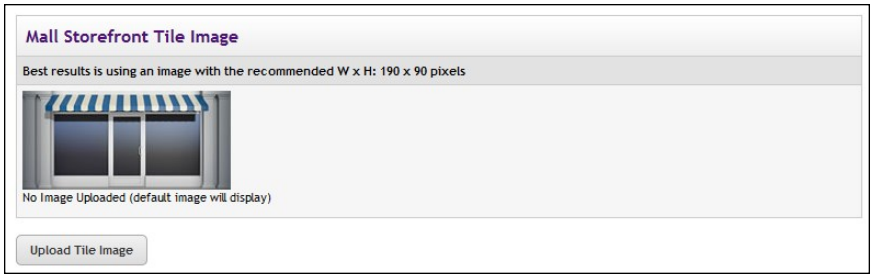
The Marketplace Store Category Assignments fields appear at the bottom of the Store General Settings page. The available mall-level store categories appear in the New Assignment list box. To assign a store to a category, select the category name from the New Assignment list box and then click the Add 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.

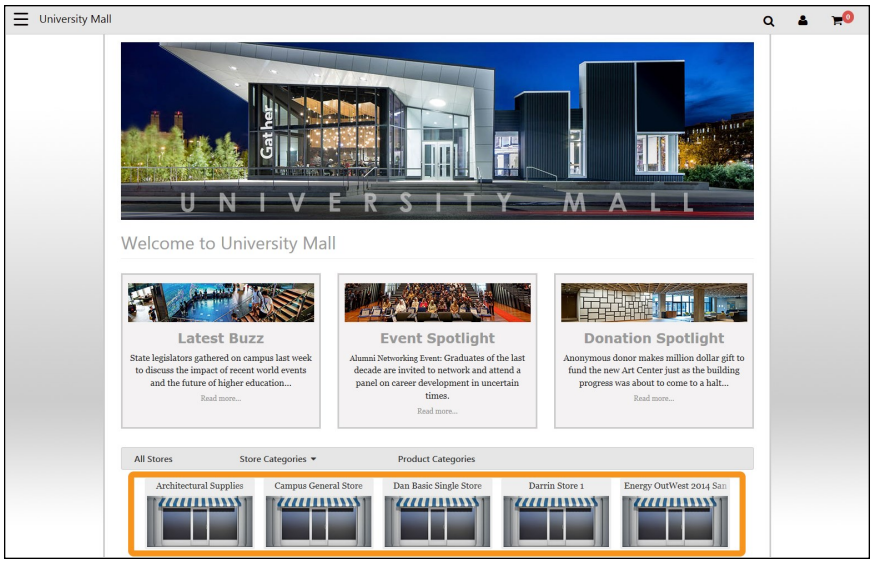
©2024 TouchNet Information Systems, Inc.



The Mall Storefront Tile Image field on the Store General Settings page.

Uploading a Mall Storefront Tile Image

Tiles for each store appear in the lower portion of the mall home page. This area is called the Category Link Display. Each tile may optionally display a store image.



A Mall Storefront Tile Image can be uploaded for each store. This image will display in the Category Link Display of the mall home page.

The tile image for a store can be uploaded by selecting the Upload Tile Image button. If no image is uploaded a default storefront tile image will be displayed. Recommended size for the storefront tile image: 190 pixels wide by 90 pixels high.

With Feature Pack 9, for schools that have licensed Marketplace Point-of-Sale, you now have the ability to upload and display your own storefront and product images (within a store) for Marketplace Point-of-Sale. Previously, default images were the only images available. These uploaded and stored images will display on your desktop and handheld devices for Point-of-Sale.

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4.6 Copying Existing uStore Settings

There may be occasions when you may want to refresh (replace or override) an existing store's settings with a copy from another store. With Marketplace 8, institutions now have the ability to copy store settings and template properties to another store within the same environment (i.e., within the production environment, within the test environment).

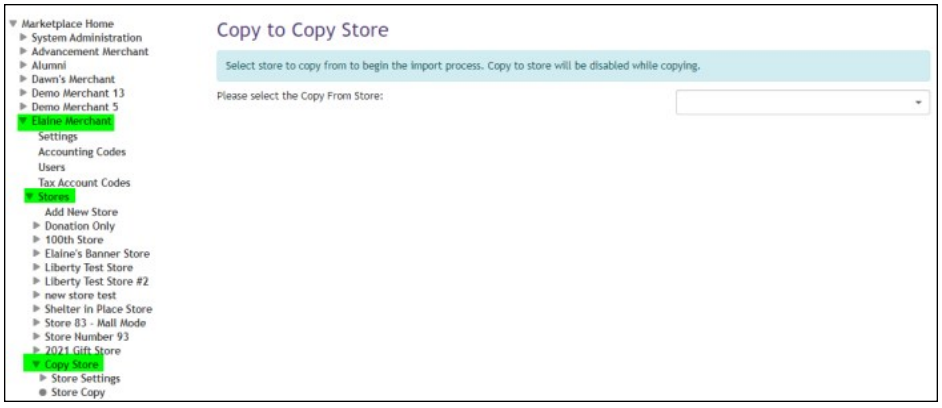
A user must have the *Copy Permission* user permission to be able to copy an existing store's settings.

The Copy Permission role will allow users with access to multiple stores or merchants to copying an existing store's settings. Users with Copy Permission will see a menu item of “Store Copy” under Store Settings and above Order Search.

Note: If a user has Copy Permission but has access to only one store, the Store Copy menu item will not display.

To copy an existing store's setting to another store, follow these steps.

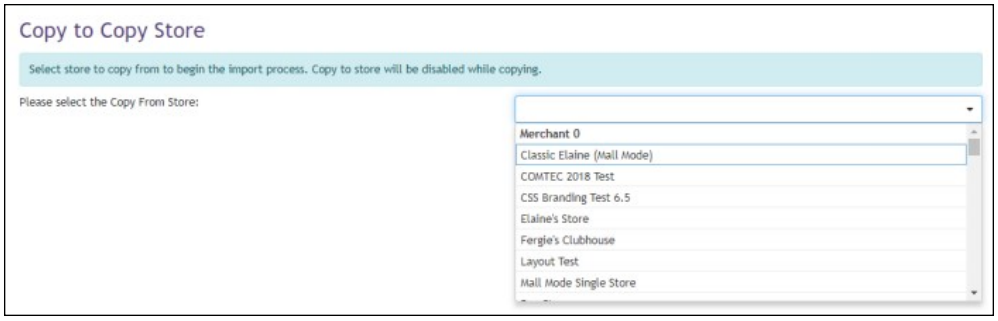
1. From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > Store Settings > Store Copy. The Copy to Copy Store page appears.



The Copy to Copy Store page

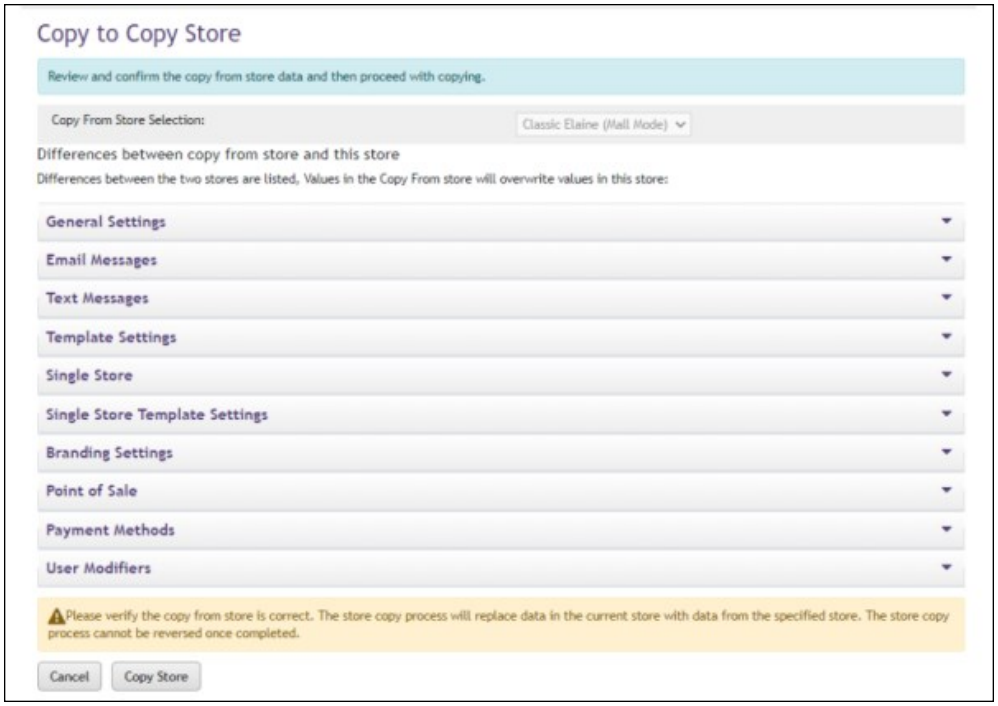
2. Click the dropdown arrow to select the copy from store. The menu displays all the stores that you are currently authorized for. If you are authorized for multiple merchants, you will see the merchant name and the stores under that merchant. You can copy within a merchant or across merchants if you have permission to multiple merchants.

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Copy to Copy Store dropdown menu

3 Select the desired store and click Next. The Confirmation page displays.



The Copy to Copy Store Confirmation page

This confirmation page shows the differences between the current store settings and the “copy from” store. The format and data contained of this confirmation page is similar to the copy new store page, with a few exceptions. Refer to the "Copying New uStore Settings" on page 146 for more information.

- Categories will NOT be copied. This is to avoid negative impacts to existing products.
- Shipping Classes/Delivery Methods will NOT be copied. This is to avoid negative impacts to existing products.
- When copying between different store types (i.e. copying a mall store to a single store, overriding the single store settings) the copy process will replace the single store settings, adding or removing

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single store settings (single store menu, template layouts, templates branding).

4 Once you have verified all the information to be copied, click the Copy Store button at the bottom of the page.

5 A confirmation popup window displays to confirm your store copy.

Important!

- Once a copy has been completed it cannot be reversed.
- The store will be disabled via the copy process.

If the copy was successful a Completed Copy page displays with a success message at the top of the page. This page will have a copy of all the settings that were copied and will also allow the user to export the results to a .CSV file. The .CSV file has each setting impacted with the original and replaced values.

If a copy fails the Store Copy page displays with a failure message in red at the top of the page.

Important! Administrators should review the settings copied and update as necessary. The store can be re-enabled when the Administrator feels it is correct.

QR Codes

The QR Code Management section allows you to generate a QR code that can be downloaded for use on printed material. The QR code represents a URL for a store home page. The QR code can be used in printed material, such as a magazine or a sign or product packaging or a business card or almost any object about which users might need information. The main use of QR codes comes in smart phone applications that use a camera to photograph the QR code. The application interprets the QR code and links to the targeted web page by opening a web browser installed on the smart phone.

Note: The QR Code Management section of the Store General Settings page only appears if Mobile Marketplace has been licensed.

To generate and download a QR code, follow these instructions:

1 In the left navigation menu, go to Marketplace Home > [Merchant] > [Stores] > [Store Name] > Store Settings > General. The Store General Settings page appears.

2 The QR section is on the right-hand portion of the page, underneath Product images.

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3 Choose Small, Medium, or Large from the Code Size dropdown menu.

- Small—Size: 250 pixels wide by 250 pixels high.
- Medium—Size: 350 pixels wide by 350 pixels high.
- Large—Size: 550 pixels wide by 550 pixels high.

4 Choose png, pdf, jpeg, gif, or bmp from the File Type dropdown menu.

5 Choose the Create Image button.

The QR Code image then appears in the Image box.

Note: The URL associated with the QR Code appears in the Embedded URL field.

6 Choose the Download Image button to initiate the download of the image.

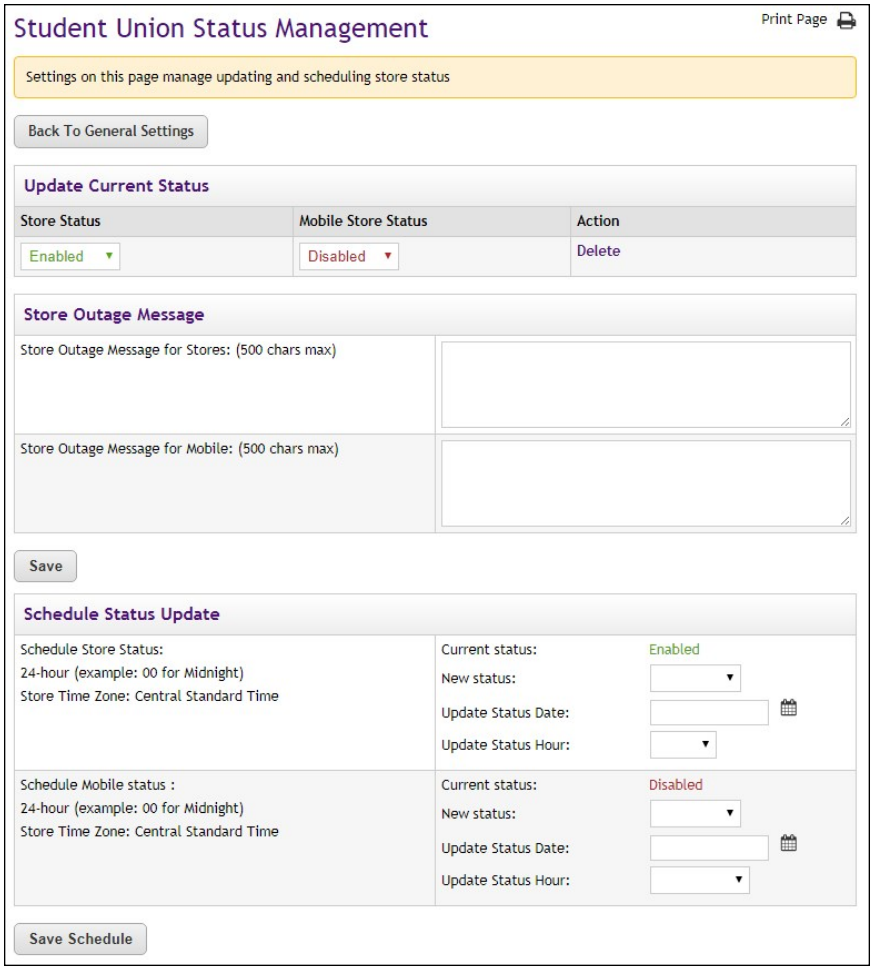
7 Save the file to the location of your choice.

4.7 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 changed 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.

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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.

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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 Enabled status option. Unless you choose Enabled, your store will remain offline and unavailable to shoppers.

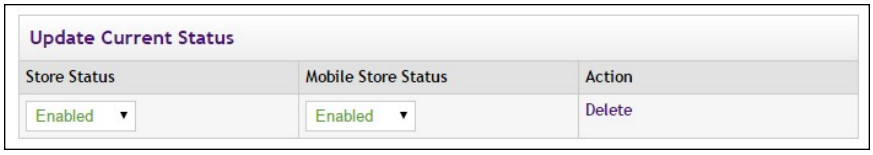
Updating the Current Store Status

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.



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.

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You can also schedule status changes for specific dates and hours. For more information, see **"Scheduling Status Updates" on page 168**.

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.

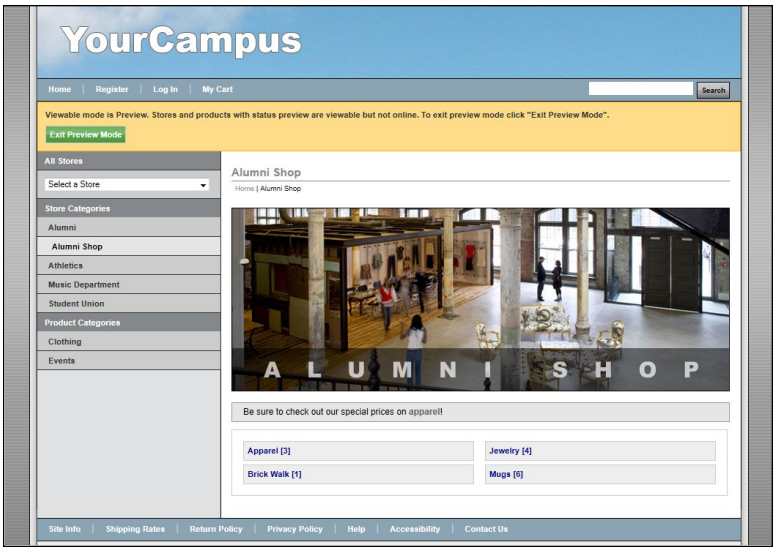


You can click the View link in the Store status row to launch a preview window.

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.

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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."

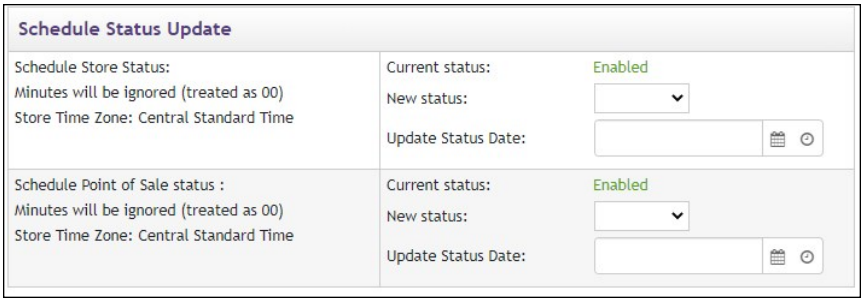
You can configure the text that will appear as the outage message. To configure this message, use the "Store Outage Message for Stores" field on the Store Status Management page.

This field does not accept HTML.

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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.

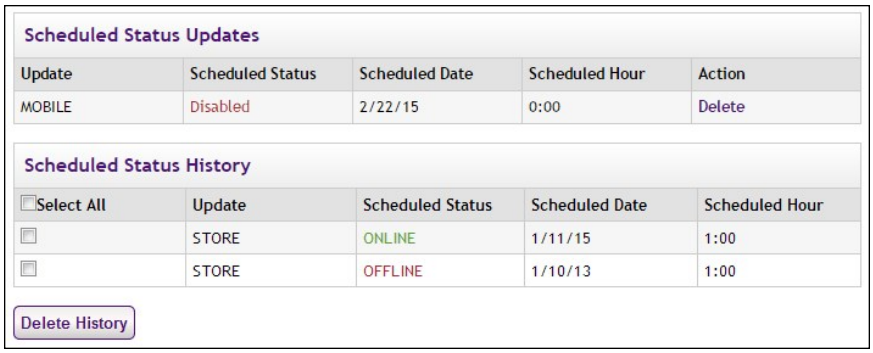


You can schedule a status change by using the Store Status Management page.

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 165**.
3. Click the calendar icon in the "Update Status Date" field and select the desired date from the calendar widget. If you enter a date, you must use this format: mm/dd/yy. For example, enter June 29, 2020 as 06/29/20.
4. Click the clock icon to select the desired time from the dropdown list.
5. Choose the Save Schedule button.

Once a status update has been scheduled, it appears in the Schedule Status Updates table.



Scheduled status updates appear in these tables.

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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.

Archiving a Store

Schools have the ability to archive an existing store that is no longer in use, instead of deleting it. The archive option allows you to retain the store's order history for reporting purposes or order search. Once a store is archived it will no longer display in the Marketplace Operations Center.

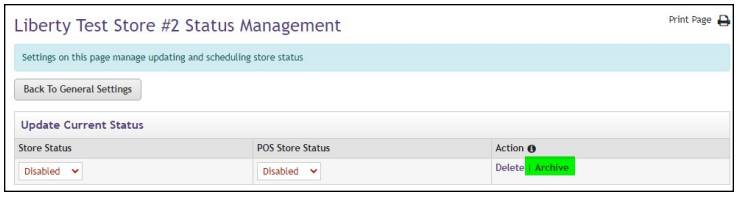
Users with the Administrator, Merchant Manager, or Store Manager role will be able to archive a store.

The Archive option will be available if there are no outstanding recurring payment or pending fulfillments for the store.

Important! You should not archive a store if refunds could still be issued (one year from last order/recurring payment). Archiving a store will prevent refunds from being completed in Marketplace.

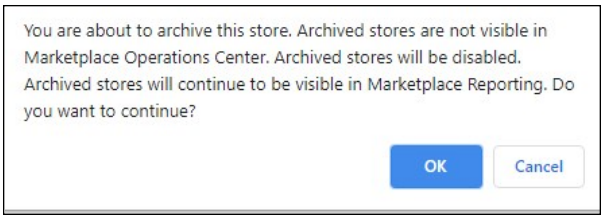
Follow these steps to archive an existing store.

1. From the left navigation menu select the desired merchant > Stores > [store] > Store Settings > Status Management. The Status Management page displays.
2. In the Update Current Status section, click the Archive option in the Action column.



The Archive Action

3. A popup window displays for you to confirm you want to continue with archiving this store. Click OK to continue archiving the store.



The Archive Confirmation window

Once a store is archived, it will no longer display in the left navigation menu.

When you have archived store(s), an Archived menu option displays in the left navigation menu, under the Merchant. The Archived window displays all stores that were previously archived.

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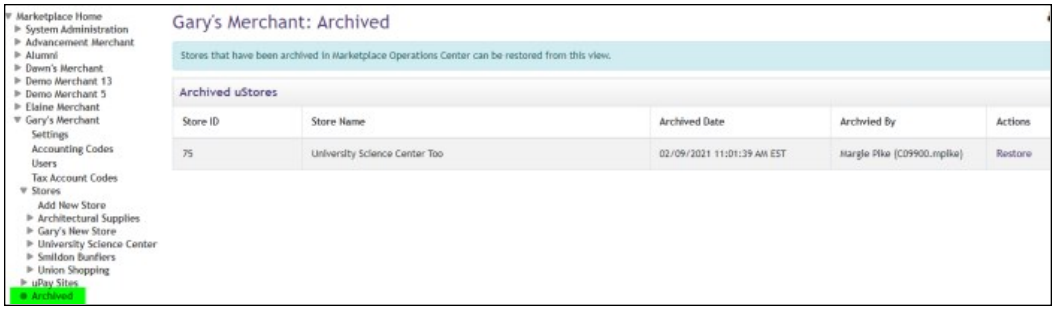
The Archived menu option

Restoring an Archived Store

If you need to restore a previously archived store, you can use the Archived menu option to view all your archived stores and select the desired store to retrieve.

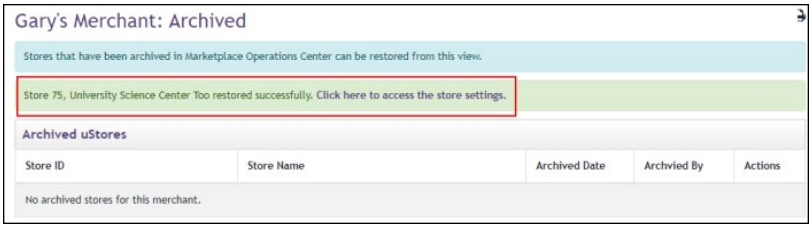
Follow these steps to restore an archived store.

1. Click the Archived menu option. The Archived store window displays.



Restore an archived store using this window

2. Click Restore in the Action column. The store is restored.
3. A message displays at the top of the Archive page indicating the store is restored successfully. To view the store settings, click the link displayed in the message.



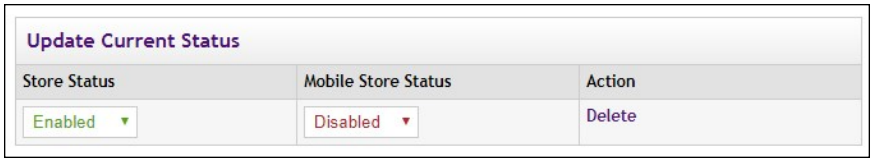
The successfully restored message

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The Status Management page displays for the previously archived store. The store also displays in the left navigation menu.

Deleting a Store

To delete a store, use the Update Current Status section of the Store Status Management page.



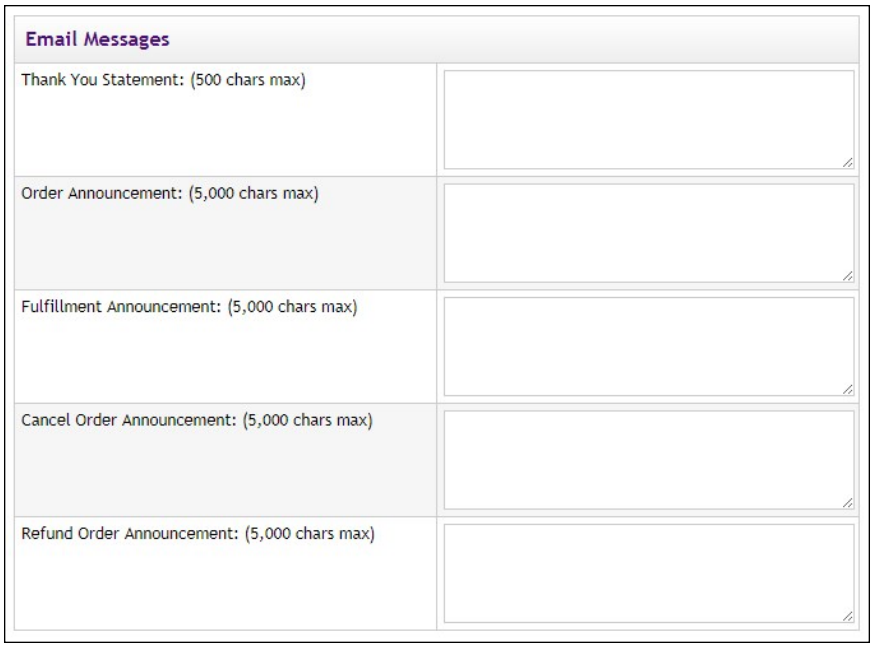
You can delete a store by using the Update Current Status section.

Simply select the Delete Store link. A prompt will ask you to confirm the deletion of the store.

4.8 Email Messages for Stores

The Email Messages page allows you establish the announcement statements that will appear on each e-mail message type.

To view the Text Messaging page, go to Marketplace Home > [Merchant] > Stores > [Store] > Email Messages. The Email Messages page then appears.



E-mail message announcement can be configured by using these fields.

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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 immediately below the message heading. The Thank You Statement also appears on fulfillment e-mail notifications, order cancellation e-mail notifications, and refund confirmations. Characters entered in this field will appear as text in e-mail messages. (500 characters max.)

Note: When using this field, keep in mind the text you enter in this field will be used with all four message types described above, so you should avoid entering any text in this field that is only relevant for order confirmations or only relevant for fulfillment confirmations. Separate announcement fields (as described below) are available for each message type.

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

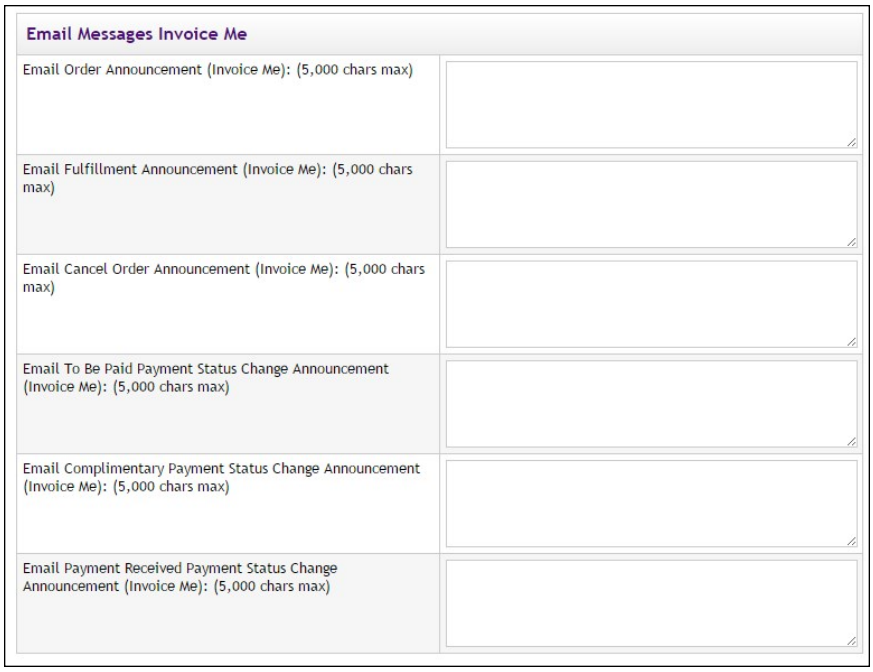
The Email Cancel Order Announcement appears on e-mail messages generated when orders are cancelled during the fulfillment process (for example, because an item is no longer available, because the customer's payment card number is incorrect, because the customer's payment card has expired, etc.). Use 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

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request has been processed. Characters entered in this field will appear as text in e-mail messages. (5,000 characters max.)



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 36**.)

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.)

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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

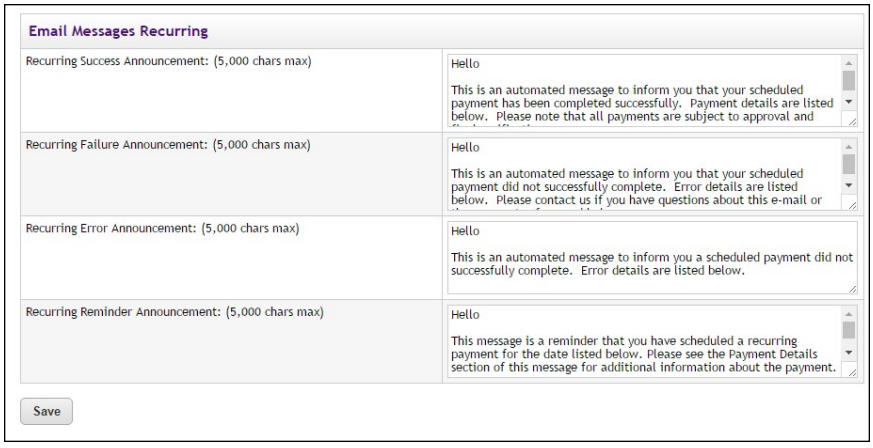
The Email To Be Paid Payment Status Change Announcement appears on Invoice Me e-mail messages generated to customers after the status of the order has been changed to "To Be Paid" during fulfillment. Use this announcement field to enter a paragraph that tells customers a balance remains to be paid for 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.)



More settings from the Store General Settings page.

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Email Messages Recurring

Note: The following fields are available if Yes is selected for "Allow Recurring Payments On Donation Product Type" on the Store General Settings page, as described in **"General Settings" on page 152**.)

Recurring Success Announcement

This announcement text appears in e-mail confirmation messages when a uStores recurring payment was processed successfully. Use this announcement field to enter a paragraph that tells customers their recurring payment was received. This field accepts a maximum of 5,000 characters. HTML is not allowed in this field. Your entry will appear as a single line without any formatting or line breaks.

Recurring Failure Announcement

This announcement text appears in e-mail confirmation messages when Marketplace attempts to process a recurring payment and the payment fails. Use this announcement to enter a paragraph that tells customers their recurring payment was not successfully processed. This field accepts a maximum of 5,000 characters. HTML is not allowed in this field.

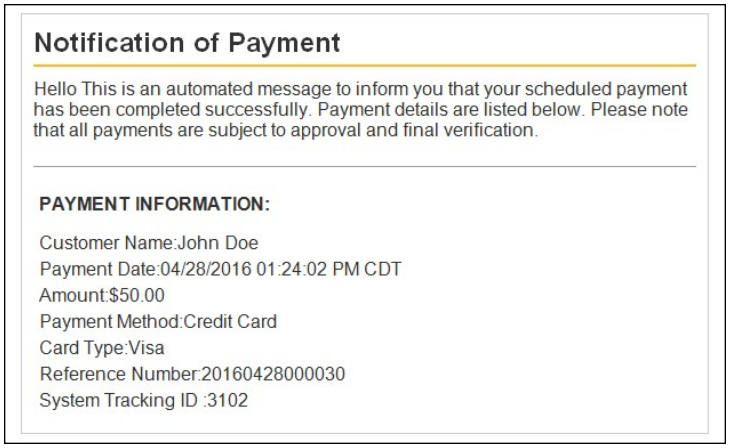
Recurring Error Announcement

This announcement text appears in e-mail confirmation messages when Marketplace encounters an error regarding a recurring payment. This message is NOT sent to the customer. Instead, this message is sent to a Marketplace administrator. The destination e-mail address for these messages is configured in the *tmsrecur.prp* file and was established when Marketplace was installed. If you need to change this e-mail address, please contact TouchNet Customer Care. This field accepts a maximum of 5,000 characters. HTML is not allowed in this field.

Recurring Reminder Announcement

This announcement text appears in recurring payment reminder messages (which can be turned on by using the the Recurring Donation Reminder field, as described in **"uPay Recurring Payments" on page 505**).

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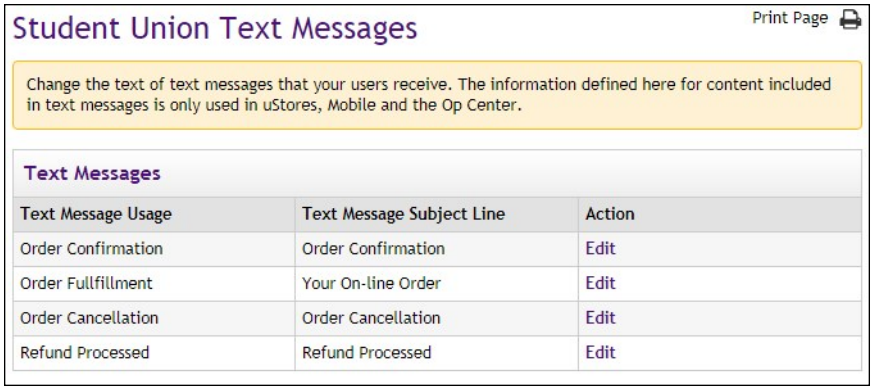
An example of a recurring payment reminder message.

Use this announcement field to enter a paragraph that tells customers that they have a recurring payment scheduled to take place. This message appears directly below the message heading. The customer name, payment date, and the payment amount appear in the Payment Information section. This announcement field accepts a maximum of 5,000 characters. HTML is not allowed in this field.

4.9 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.



The Automatic Message Content page is used to maintain text message content.

There are four types of messages:

- Order Confirmation messages

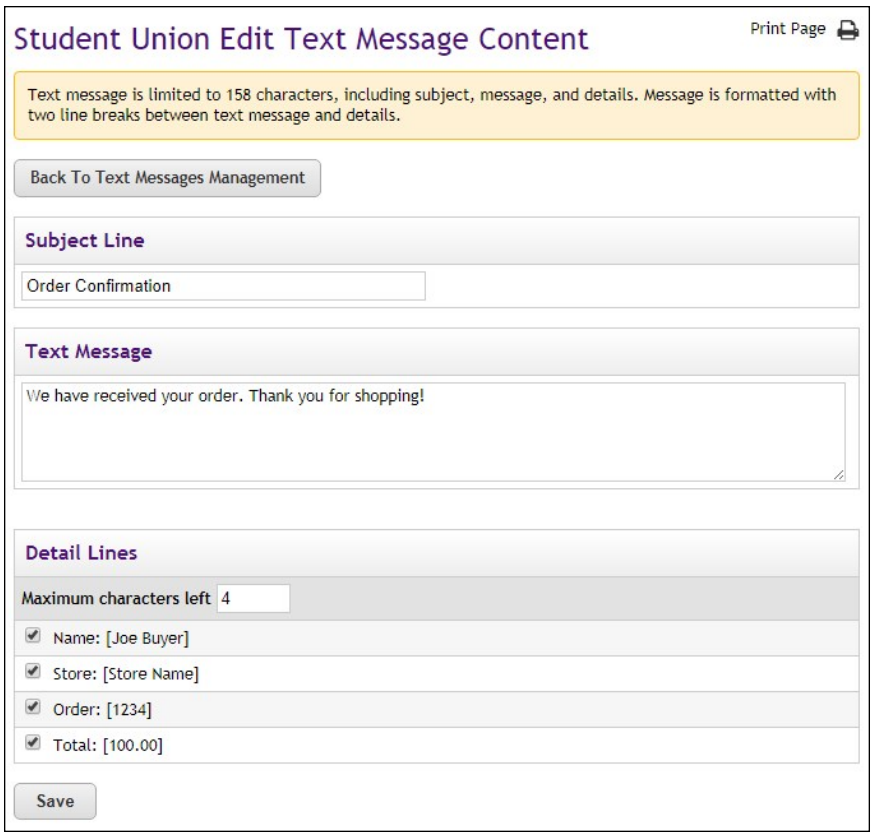
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- Order Fulfillment messages
- Order Cancellation messages
- Refund Processed messages

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 65**.

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.

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- **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 characaters.

4.10 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.

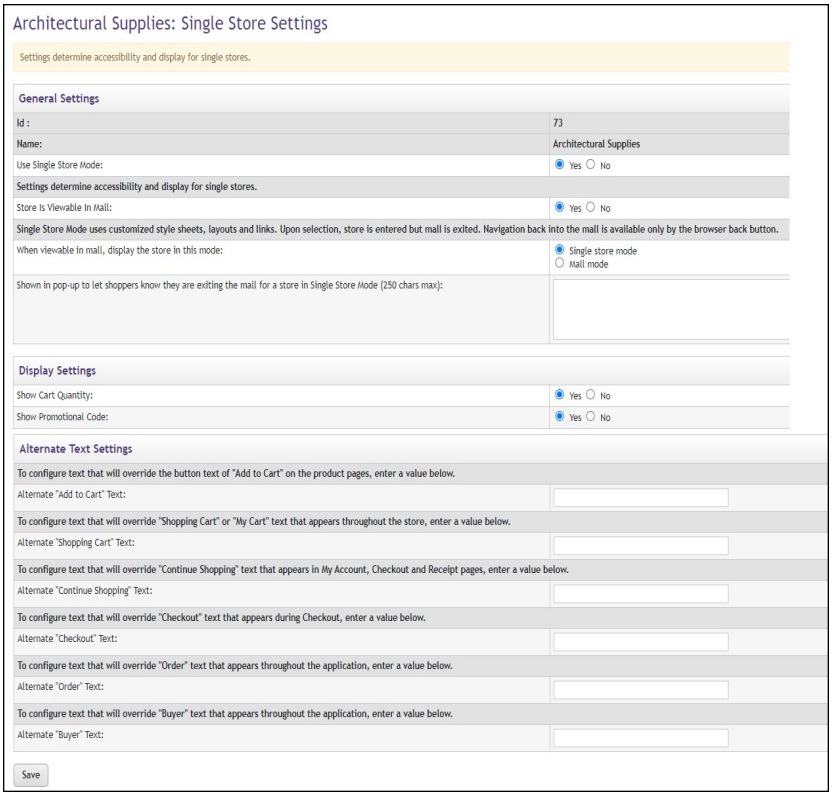
Stores may use single-store mode for simple changes to button text (e.g., changing "Add to Cart" to "Make a Gift" or changing the word "buyer" to "donor"), or single-store mode can be used to customize the look and feel of a store completely (e.g., with new background images and colors specified in a customized style sheet).

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.

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Complete the following fields:

General Settings

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 272**.

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

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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.

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 272**), 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 182**

Shown in pop-up to let shoppers know they are exiting the mall for a store in Single Store Mode

Only applicable when "Link to Single Store From Mall" is Yes. The message entered in this field will be displayed to customers when they leave the mall and enter a store in single store mode. When customers enter a store in single store mode, they can only navigate back to the mall by using their browser's back button.

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.

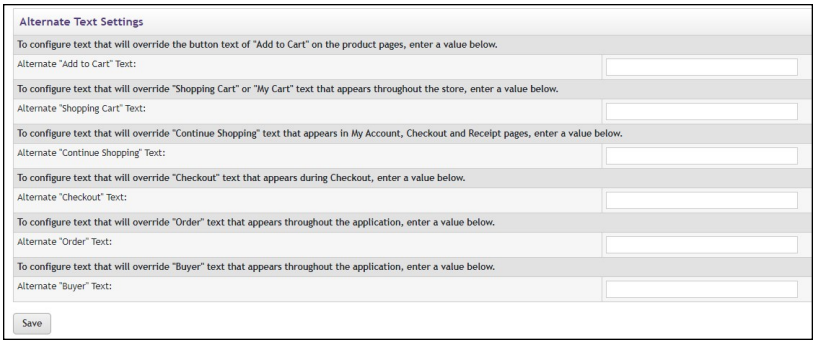
Note: The Show Cart Quantity field does NOT affect whether the store pages ask the customer to select a quantity of the product that they are

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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 remove this column.



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.

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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.

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.

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 272**.

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

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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 272**), 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 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.

4.11 The Store Layout Template

Marketplace allows you to take control of how your Marketplace store is branded. The store template breaks down the layout into the various

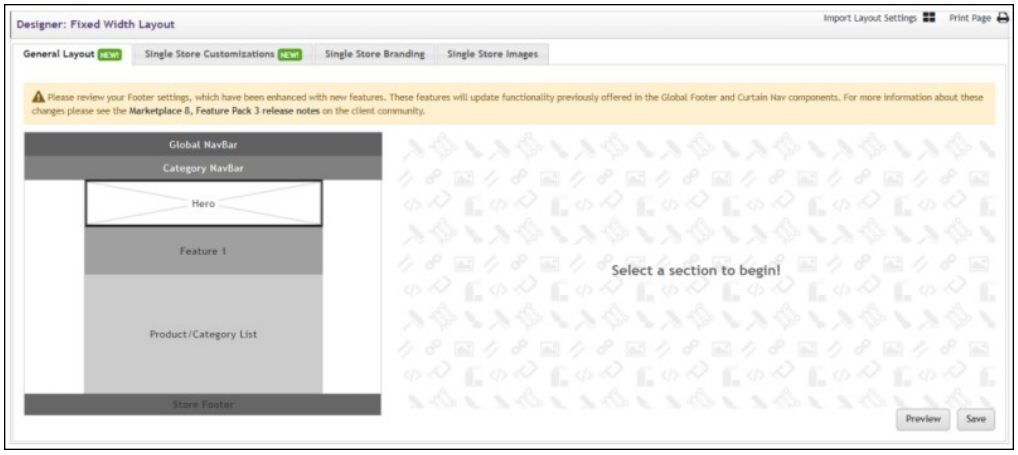
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components that appear on store pages—such as the Global NavBar, the Curtain Nav, and the Global Footer (to name just a few)—and then provides configuration settings for each element.

Store managers (and merchant managers) can configure the store template for a Marketplace store. To get started using a store template (or to modify an existing store template), a user with the store manager or merchant manager role can navigate to the following destination in the Operations Center:

[Merchant Name] > Stores > [Store Name] > Store Settings > Store Template Setup

The Marketplace Store Templates page then appears.

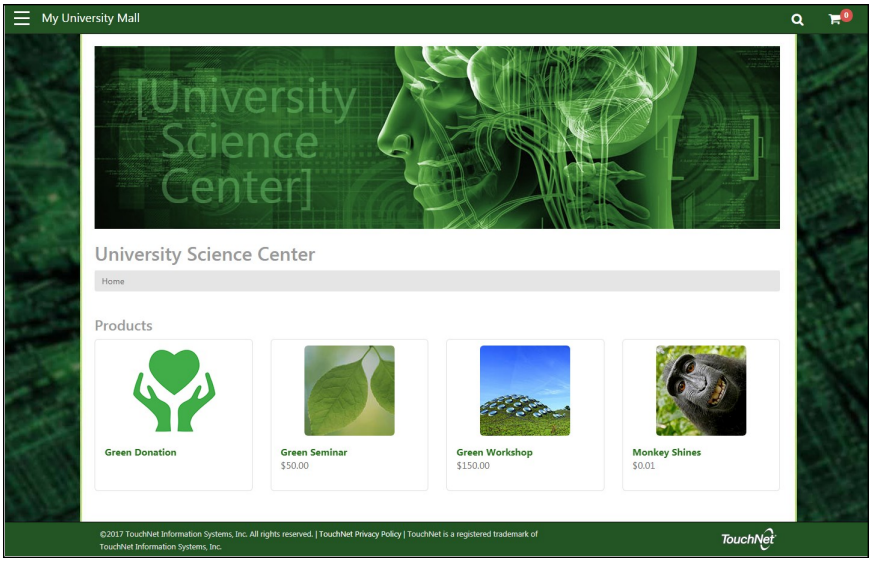


The Marketplace Store Templates page.

What is the "Designer: Fixed Width" Template?

The "Designer: Fixed Width" template provides you with layout and configuration options for your Marketplace store. It features a curtain navigation menu, a thin navigation bar at the top of the page, a large area where one or more hero images can be displayed, a feature area where one or more content additions can be configured (these areas support the use of HTML and CSS), an area for displaying product and category images, and a thin footer bar. The header and footer components are designed to expand horizontally and fill the width of the customer's browser, while the main content area uses a fixed width (1170 pixels wide).

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An example of a Marketplace store in single-store mode.

What Can Be Configured?

The available options for this template depend upon whether single-store mode has been activated (on the Single Store Settings page).

If single-store mode has NOT been activated, then the store looks very much like the mall layout (with the main exception being the Hero Image and the "Feature" fields, which can be used to add HTML to the store home page). However, if single-store mode has been activated, then many more options are available.

How Can You Configure a Store Template?

You can modify template configuration by selecting the Edit button for the Designer template. The Marketplace Store Template Setup page then appears.

Can a Store Use a Different Template than the Mall?

Yes, but in order to use a different template, the store must be in single-store mode. If the store is NOT in single-store mode, it will inherit the template used by the mall.

Does the Mall Template Affect Stores?

It depends. If a store is displayed in single-store mode, then the store can use its own template and therefore have its own look and feel. However, if a store is NOT displayed in single-store mode, then yes, the store will use

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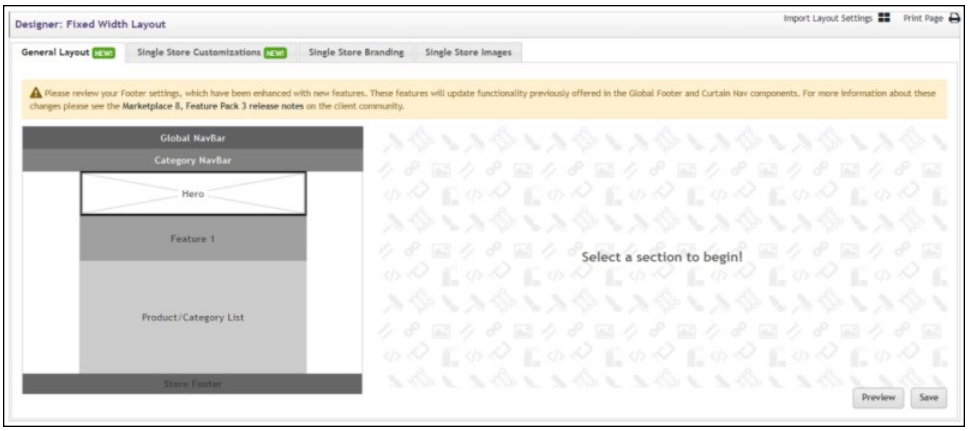
the mall template and have the same look and feel as the mall, with the exception of the hero image(s) and the feature fields, which can be customized.

Selecting a Template

Store managers (and merchant managers) can configure the store template for a Marketplace store. To get started using a store template (or to modify an existing store template), a user with the store manager or merchant manager role can navigate to the following destination in the Operations Center:

[Merchant Name] > Stores > [Store Name] > Store Settings > Store Template Setup

The Marketplace Store Templates page then appears.



The Marketplace Store Templates page

The available options for this template depend upon whether single-store mode has been activated (on the Single Store Settings page).

If single-store mode has NOT been activated, then the store looks very much like the mall layout (with the main exception being the Hero Image and the "Feature 1" field, which can be used to add HTML to the store home page). However, if single-store mode has been activated, then many more options are available.

This template features a curtain navigation menu that only appears when a customer selects a menu icon, a thin navigation bar at the top of the page, a large area for one or more hero images, a feature area in which HTML and CSS can be entered, a tabbed area with links for stores and categories, and a thin footer bar.

The Global Navbar and Global Footer components are designed to expand horizontally and fill the width of the customer's browser, while the main content area uses a fixed width (1170 pixels wide).

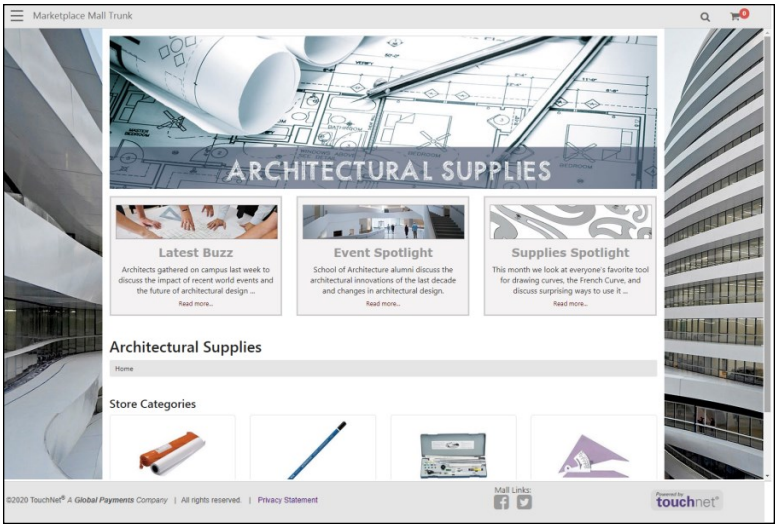
Editing the Designer Template

The Designer template uses a fixed width (1170 pixels wide) for the main content area. The template contains several components, including a thin navigation bar at the top of the page (the Global NavBar), a curtain navigation menu that only appears when a customer selects a menu icon, a

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large area for one or more hero images, a feature area in which HTML and CSS can be entered, a tabbed area with links for products and categories, and a thin footer bar. The Global NavBar and footer components are designed to expand horizontally and fill the width of the customer's browser.

In addition, stores in single-store mode can also use a single-store header and a single-store footer.



The Designer template is being used by this store.

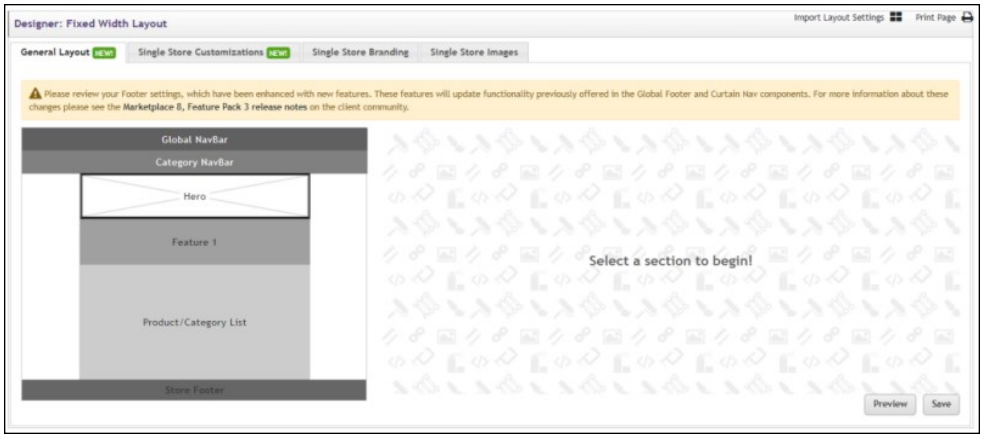
The options available in Store Template Setup depend upon whether a store is in single-store mode or mall mode: users of single-store mode will see four tabs of options while users of mall mode will see one configuration tab. These tabs are described below.

The General Layout Tab

This tab contains a graphical representation of the Designer: Fixed Width Layout. As you move your mouse over each component, a black outline will appear around each component that can be configured. You can click on the various components to see the related configuration settings. The components that can be configured include the Hero Image, the Feature fields, the Product/Category List and the Store Footer.

The General Layout, Single Store Customizations (previously called Single Store Layout), and the Single Store Branding tabs allow the configuration of a “custom” footer component that overrides the Universal or Mall template.

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Settings that can be configured at the General Layout level (both mall and single stores) are:

- Links for Return Policy Content, Contact Us and Shipping Rate Display will be moved from the curtain navigation to the footer. When configured these links will appear in the footer component.
- New “Back to Mall” link will be available for mall stores. This link, when clicked in a mall store, will direct the shopper to the mall home page.
- Mall stores sort order of these links will be set at the mall level, with the Shipping Rates and Back to Mall links being appended to the end of the list when enabled.

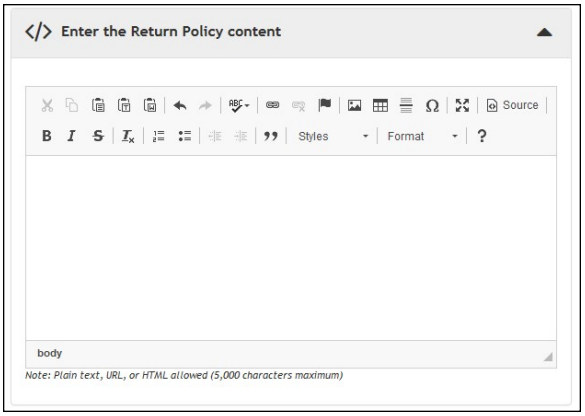
Editing Links

These are the links that you can edit for your store or mall.

- **Return Policy Content**—TouchNet strongly recommends that you develop policies regarding your store's return policy. This policy should be available for shoppers from the Return Policy link.

  When shoppers select the Return Policy link, a modal window is displayed that provides information about the store's return policy. (This same text also appears on the Review Order page of the checkout process.) This text can be configured by using the "Enter the Return Policy content" field.

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You can enter custom content for for the Return Policy.

The "Enter custom content" field includes a large text entry area and a toolbar with various buttons that can be used for adding formatting. You can use the buttons to add styling, images, tables, horizontal lines, hyperlinks, numbered lists, bulleted lists, or block quotes. When you select the image button, you will be asked for the URL for the image. This URL can reference an image on an external server, or it can point at an image that you have uploaded for use with Marketplace. See **"Editing the Designer Template" on page 186** for more information about URLs/paths.

You can use the Source button to view the HTML code that will be used for the message. You can edit this HTML or add new HTML. (Any code entered in this field must pass the security validation process. For more information about the allowed code, see the *Security Validation Guide*.)

The Enter the Return Policy content field accepts up to 5,000 characters.

For stores in single-store mode, you can change the label (link name) that appears in the Curtain Nav for Return Policy by using the Single Store Layout tab.

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).

- **Show Shipping Rate Info**—You can turn on/off the display of the Shipping Rates link in the footer.
- **Contact Us**—A Contact Us link appears in the footer for your store. You can enter an e-mail address for the Contact Us link. The e-mail address you list here will potentially receive e-mail messages from shoppers about individual stores or products. Be sure to keep this e-

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mail address current. The Contact Us link always appears at the end of the options list.

This e-mail address is also used as the "from" address for e-mail messages generated by transactions. For more information, see **"uStores E-mail Addresses" on page 473**.

Note: The Contact Us option cannot be reordered. It will always display as the last item in the list.

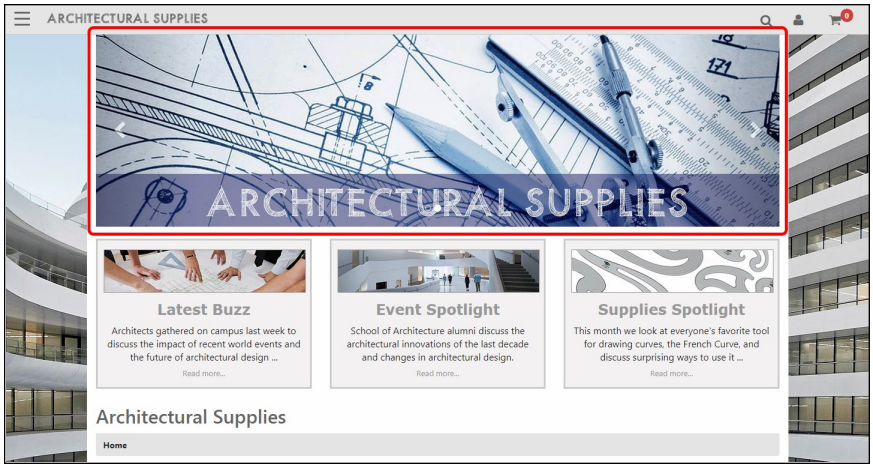
For more information about the footer and settings that only apply to stores in single-store mode, see the Single Store Layout tab.

Managing Your Hero Image(s)

From the General Layout tab you can also edit your schools hero image(s). Here are the settings for managing your hero image(s):

The hero image appears on your store home page and typically serves as the focal point for this page. We recommend you use an image 1140 pixels wide by 320 pixels high. The hero image is optional. You can upload up to five hero images, which are displayed in a hero carousel.

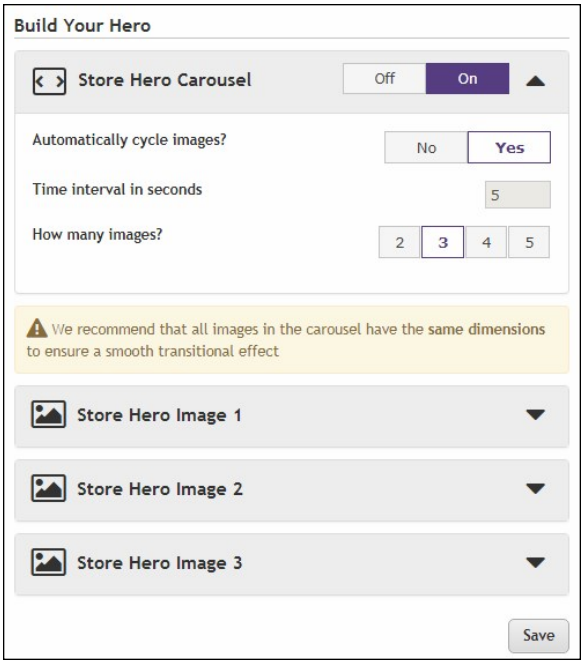
Note: To minimize vertical scrolling for your customers, you can use images less than 320 pixels high; however, the images should always be 1140 pixels wide.



The hero image (highlighted in red) serves as the main focal point for your store home page.

To add or edit the Hero Image, select the Hero Image area on the General Layout tab. The Build Your Hero options then appear. These options allow you to upload one or more hero images and to enter some related settings. By default, the Build Your Hero image settings allow you upload one hero image; however, you can use the Store Hero Carousel settings to build an image carousel with more than one image.

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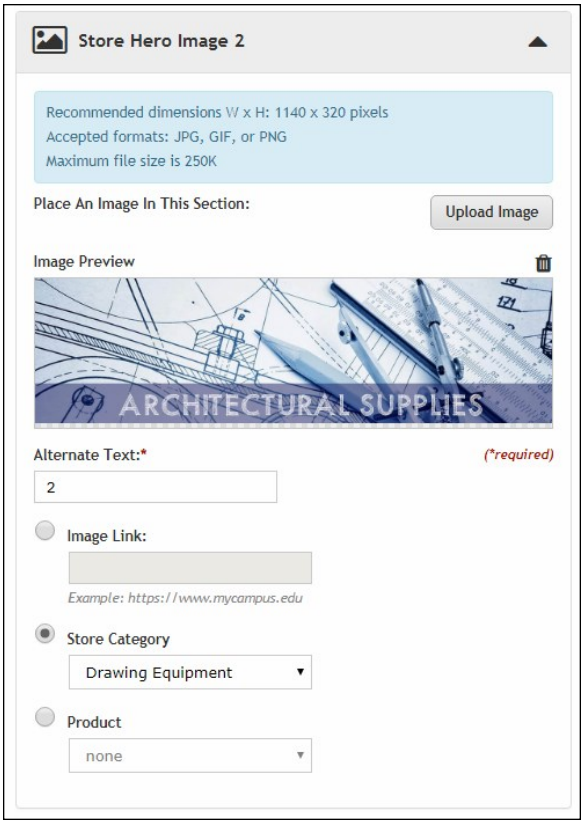


You can upload a hero image for your store's home page.

To turn on the Store Hero Carousel, select the On button. Then click the down arrow to open the configuration panel. The following settings then appear:

- **Automatically cycle images?**—Select Yes to cycle through the hero images automatically. Or select No to display Store Hero Image 1 by default; shoppers can manually select the arrows on the hero image carousel to view the additional carousel images (or select the dots at the bottom center of each image).
- **Time interval in seconds**—When you select Yes for "Automatically cycle images," this field becomes active. Enter a time in seconds for each hero carousel image to be displayed. (Minimum time interval: 3 seconds. Maximum time interval: 60 seconds.)
- **How many images?**—The Store Hero Carousel allows you to upload 2, 3, 4, or 5 images. Select the number that corresponds to the number of hero images that you would like to display. When you select a number of images to display, a corresponding number of Store Hero Image field sets appear. To configure a Store Hero Image select the down arrow for that image. The upload button, the image preview, and the other settings then appear.

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You can upload a hero image for your store's home page.

Choose the Upload Image button to upload a hero image. Accepted file formats: JPG, GIF, or PNG. Maximum file size is 500 KB.

Important! We recommend all images in the carousel use the same pixel dimensions. If the carousel images are the same size, the transitional effect will be smooth.

Additional settings:

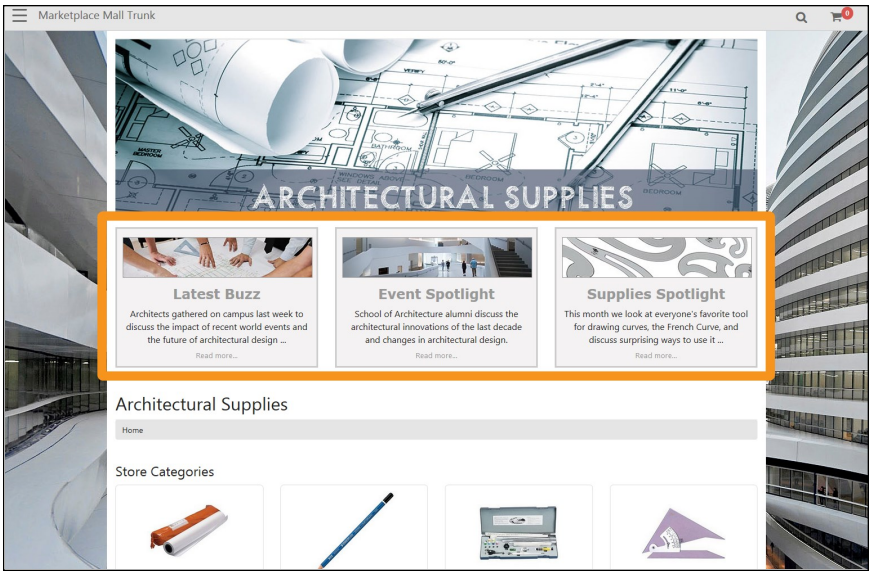
- **Alternate Text**—This field is required after you upload an image. Your entry in this field will be displayed to customers in those cases in which the hero image does not display. For example, a sight-impaired user with a screen reader would hear the Alternate Text entry read to them.
- **[Link Options]**—You can associate a link with each hero image that you upload. Three link options are available: Image Link, Store Category, and Product. Select one of the three radio buttons to choose that link option.
  - **Image Link**—This field determines what happens if a customer clicks on the hero image. You can enter a URL, to which the customer will be directed. Be sure to enter the complete URL, including "http://" or https://" as appropriate.

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- **Store Category**—The dropdown list shows the names of all product categories that have been created for the store. You can choose for the hero image to link directly to one of these product categories.
- **Product**—The dropdown list shows the names of all products that have been created for the stores. You can choose for the hero image to link directly to the product detail page for one of these products.

Managing Your Feature(s)

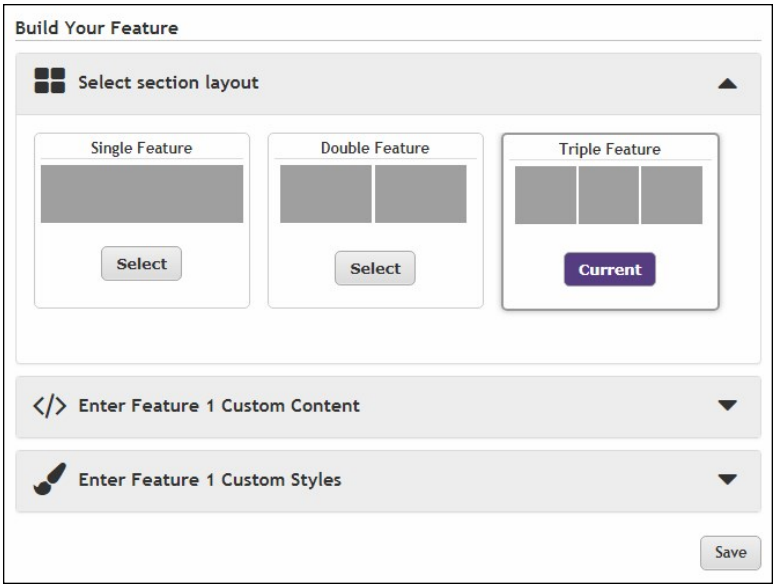
The Features fields are optional; however, these fields are potentially powerful. You can use these fields to add content to a store's home page. This content might consist of a simple text message for your customers or it might include more complex formatting, even HTML and images.



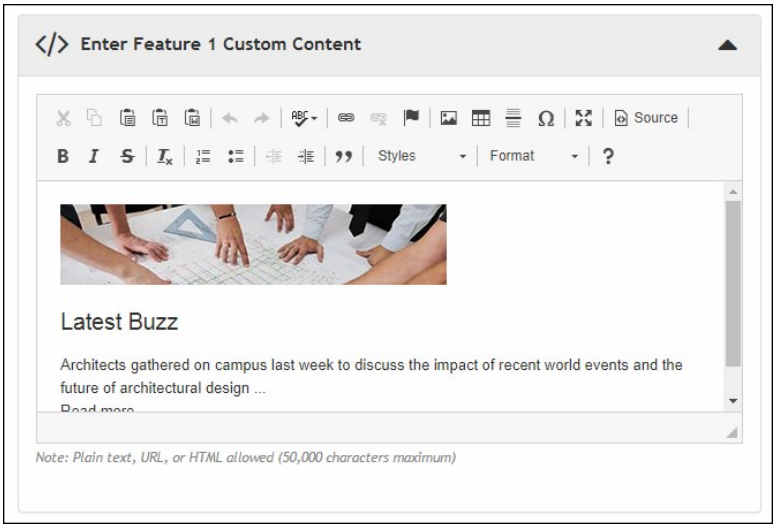
This store home page uses a "Triple Feature" (outlined in orange above).

The "Select section layout" field gives you three selections: Single Feature, Double Feature, and Triple Feature. These selection represent how many separate feature sections to generated. If you choose Single Feature, you get one feature area that spans the entire width of the store content area. If you choose Double Feature, you get two feature ares are arranged side by side, like two columns. And if you choose Triple Feature, you get three feature areas arranged side by side.

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Once you select a layout option for the feature areas, you can choose which feature area to configure by using the Mall Layout display on the left side of the Mall Layout tab. Choose Feature 1 to configure the Feature 1 area, choose Feature 2 to configure Feature 2, etc. Once you have choose a feature area to edit, you will see a "Custom Content" area and a "Custom Styles" area. Choose the down arrows to access the configuration settings for these fields.



The Build Your Feature 1 options include an Enter Custom Content field and an Enter Custom Styles field.

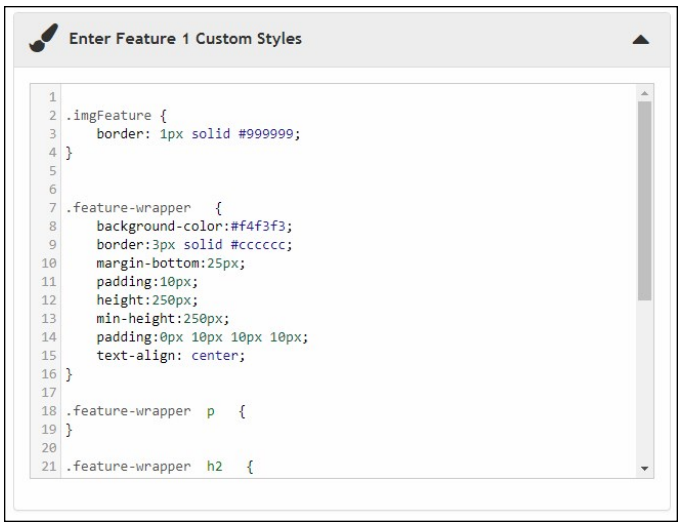
The **Enter Custom Content** field includes a large text entry area and a toolbar with various buttons that can be used for adding formatting. You can use the buttons to add styling, images, tables, horizontal lines, hyperlinks, numbered lists, bulleted lists, or block quotes.

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Note: When you select the image button, you will be asked for the URL for the image. This URL can reference an image on an external server, or it can point at an image that you have uploaded for use with Marketplace. See **"Editing the Designer Template" on page 186** for more information about URLs/paths.

You can use the Source button to view the HTML code that will be used with the Enter Custom Content field. You can edit this HTML or add new HTML.

Any HTML entered in the Custom Content field can utilize CSS that has been added via the **Custom Styles** field.



Administrators can add CSS to the Custom Styles field.

When you select the Save button, a **validation process** takes place. Any HTML 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 entry in the Enter Custom Content field. We recommend you become proficient in authoring HTML before you attempt to enter HTML is this field.

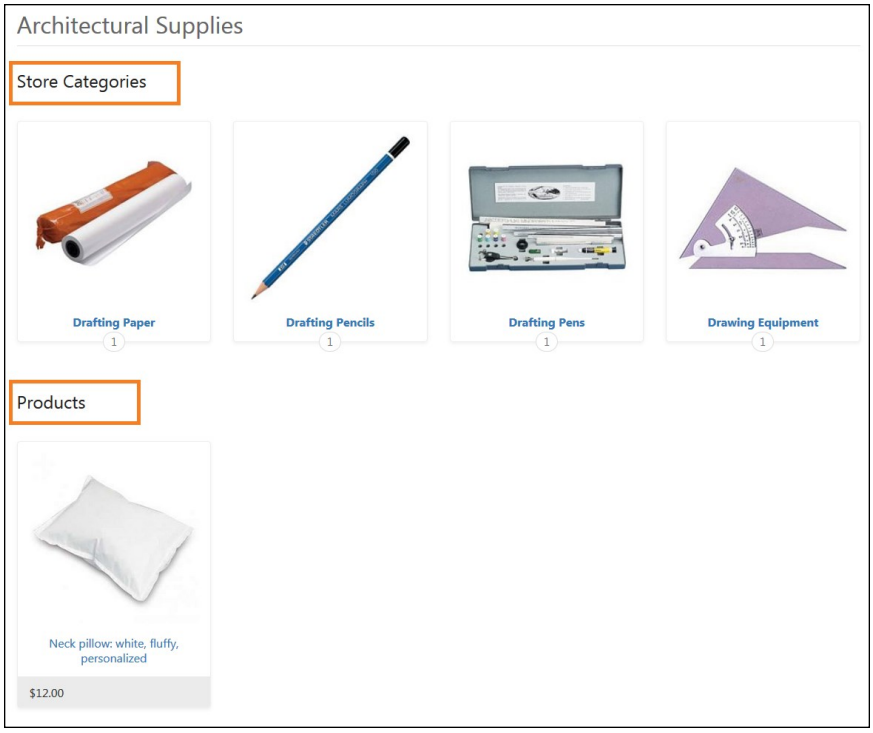
For more information about the allowed HTML and CSS code, see the *Security Validation Guide*.

The Enter Custom Content field and the Enter Custom Styles field each accept up to 50,000 characters.

Editing the Product/ Category List

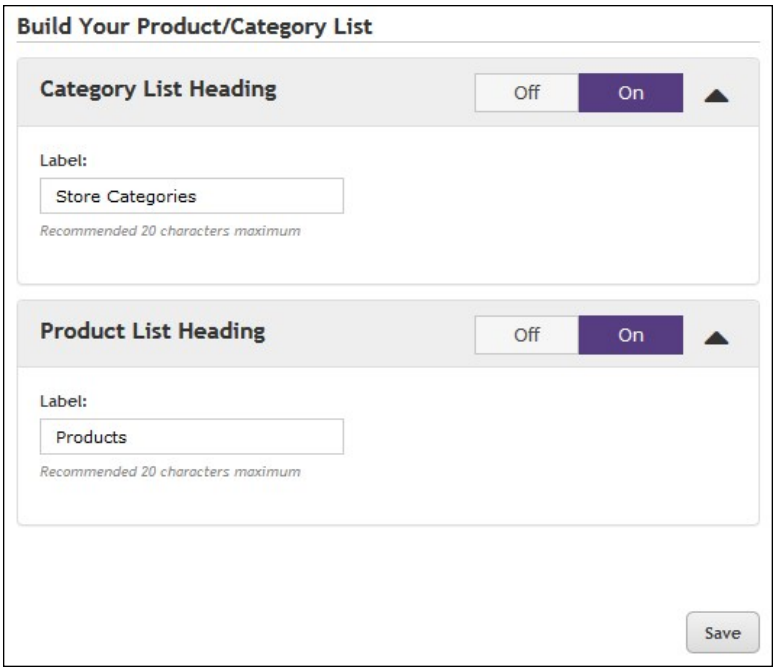
By default, the "Store Categories" section and the "Products" section appear on the store home page (below the Hero Image field and the Feature fields). However, if these section titles are not relevant for your store, you can turn off these titles or change the title text. (You can also hide store categories completely. For more information see **"Store Product Categories" on page 241**.)

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The default "Store Categories" section and the "Products" section are used on this store home page. (These sections are outlined in orange above.)

The Product/Category List configuration in the Marketplace Operation gives you separate options for the Category List Heading and the Product List Heading.

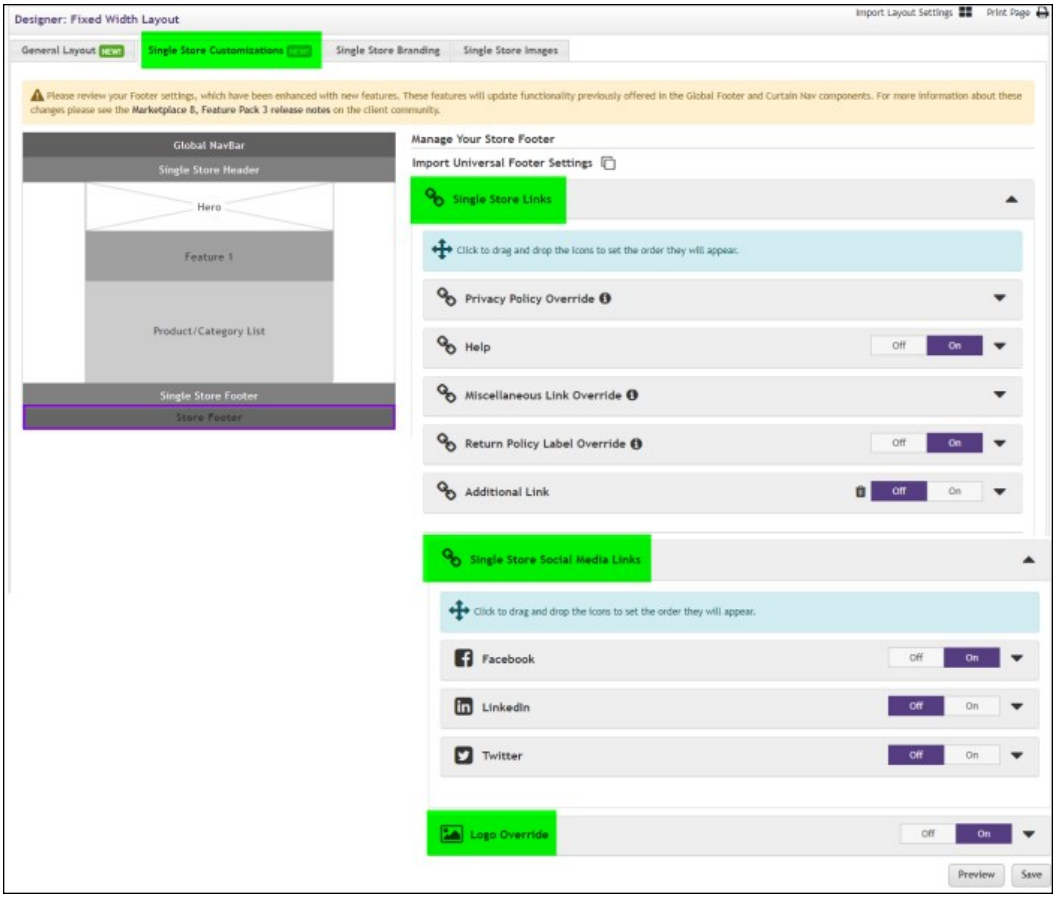


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You can enter new text for these headings by using the "Label" fields. You can also turn off display of the headings by selecting the Off buttons.

Single Store Customizations Tab - NEW

This tab contains a graphical representation of the Designer: Fixed Width Layout. As you move your mouse over each component, a black outline will appear around each component that can be configured. You can click on the various components to see the related configuration settings. The components that can be configured include the Global NavBar, Single Store Header, Single Store Footer, and Store Footer.



The Single Store Layout Tab: Import Layout Settings

The Import Layout Settings link can be found in the upper right corner of the template setup page. This link provides you with a means for taking the layout of an existing store and importing that store's single-store layout into another store. This layout can come from any store that the user has access to, not just the stores for the same merchant.

When you click the Import Layout Settings icon, a list of the available stores appears in a dropdown menu. The top of the list shows all stores with

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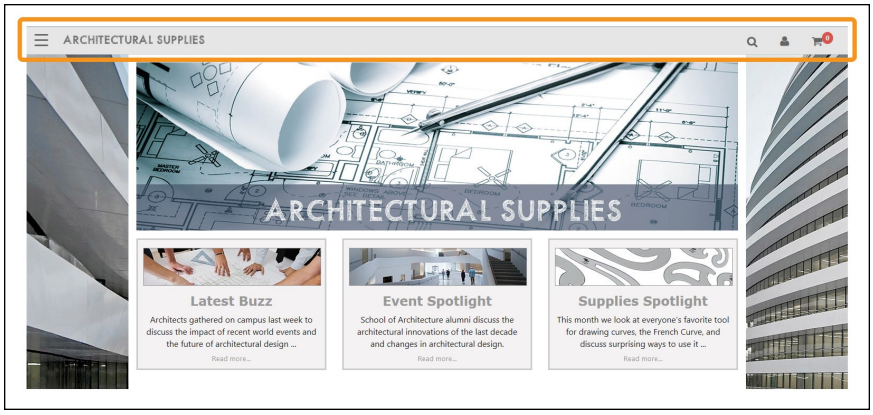
Single Store Layout configuration. If any stores have Classic layout configuration, those stores are listed in the second part of the dropdown menu.

Remember to select the Save button to save the imported settings.

Important! When you import layout from stores that use the Classic layout template, be sure to review all elements to make sure the imported elements are still relevant for the Designer template. Some elements may be too narrow or otherwise inappropriate for the Designer template, so be sure to check all the single-store layout configuration settings.

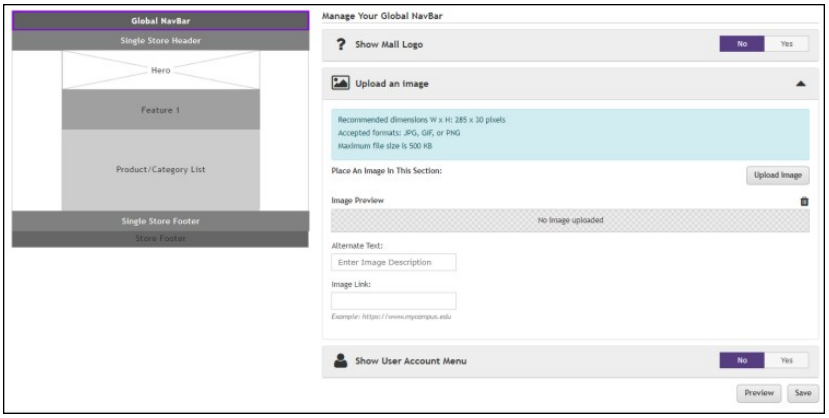
Managing Your Global NavBar

The Global NavBar appears at the top of the page and stretches across the width of the page.



The Global NavBar (outlined in orange above) spans the width of the browser window.

To edit the Global NavBar field, select the Global NavBar area on the Single StoreCustomizations tab. The Manage Your Global NavBar options then appear.



The Manage Your Global NavBar options.

If Yes is selected for **Show Mall Logo**, the mall logo (or the mall name if no mall logo has been uploaded) will appear in the Global NavBar for your

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store. If No is selected, the Upload an Image field appears (as described next).

You can **Upload an Image** to appear in the Global NavBar. (This field only appears if you selected No for Show Mall Logo) This image should be 285 pixels wide by 30 pixels high. (If you upload a larger image, it will be automatically resized.) As you plan for uploading a logo image, you should consider what background color to use with the Global NavBar, as well as the border color. These settings are on the Single Store Branding tab. (Accepted image file formats: JPG, GIF, or PNG. Maximum file size is 500 KB.)

We recommend you use a store logo image with a transparent background. Transparency is available with the GIF and PNG file formats. If you use a store logo with a transparent background, the store logo image will blend into the background color that you have chosen for the Global NavBar.

Note: If you choose No for Show Mall Logo and do NOT upload an image, the store name will appear in the Global NavBar.

Additional store logo image settings:

- **Alternate Text**—If you upload an image, this field is required. Your entry in this field will be displayed to customers in those cases in which the store image does not display. For example, a sight-impaired user with a screen reader would hear the Alternate Text entry read to them.
- **Image Link**—If you enter a URL in this field, customers can select the store image to launch a corresponding web page. For example, you might enter the URL for the home page of your school's portal web site.

The **Show User Account Menu** option determines whether links for "Register" and "Login" appear in the Global NavBar If these fields are irrelevant for your store, you can select No to turn off these fields. If you do so, customers will not be prompted to become registered users during the checkout process, and neither will they be given an opportunity to sign in.

Managing Your Store Footer

Settings that can be configured for a Single Store only are:

- Overrides for the Mall (or Universal, whichever is enabled) footer's privacy policy and miscellaneous policy links.
- Override for the Mall (or Universal, whichever is enabled) footer's logo and copyright statements.

The following Universal Footer settings can be overridden for the single store:

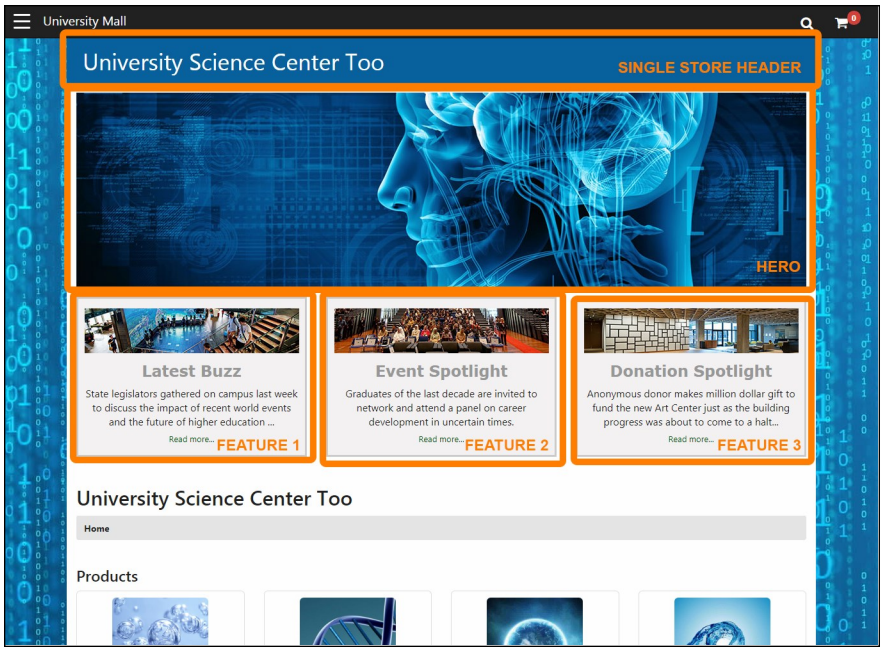
- **Privacy Policy Override**—TouchNet strongly recommends that you develop policies regarding the privacy of shoppers' data and the use of unsolicited bulk e-mail. Policies such as these should be available for shoppers from the Privacy Policy link.

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- **HelpOverride**—You can optionally use this link to provide your customers with information about how to use your Marketplace store.
- **Miscellaneous Link Override**—You can override any previous miscellaneous links that you created for the Universal footer.
- **Additional Link**—You can turn on additonal links and then add links, label them and include the URL for the link..
- **Return Policy Label Override**—You can turn on or off the return policy label that you enter previously for the Universal footer.
- **Single Store Social Media Links**—You can select the desired social media link you wish to include in the Single Store footer.
- **Logo Override**—You can select on or off to override the logo that you previously created for the Universal footer.
- **Single Store Copyright Override**—You can turn on or off the option to override the copyright that you previously created for the Universal footer and enter the copyright information to include in the Single Store footer.

Managing Your Single Store Header

The Single Store Header appears above the hero image and Feature fields. This field can be used to add additional content to your store pages. This content might consist of a simple text message or it might include more complex formatting, even HTML and CSS.



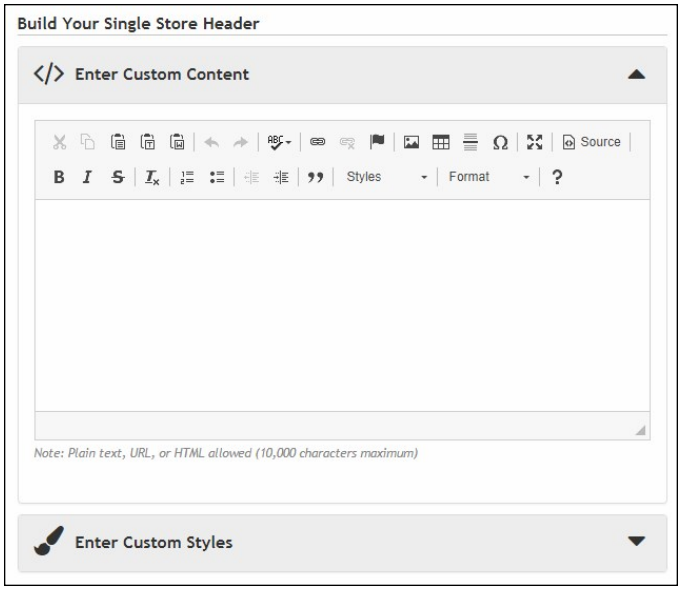
The Single Store Header (the top area outlined above in orange) appears above the hero image.

The Single Store Header field *will appear on all pages for your store*, unlike the Feature fields, which only appear on your store home page.

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Important! Be sure you do not confuse the Single Store Header with the Global NavBar. These fields serve different purposes. The Single Store Header is an optional component. Once configured, the Single Store Header will appear on all pages of your store, and it fits within the main content area—which has a fixed width. You are totally responsible for all content within this component. The Global NavBar (the thin bar at the top of the Designer template) appears on all pages *of all stores* across the entire Marketplace mall, and while some settings for the Global NavBar can be modified for stores in single-store mode (such as the background color and the logo image), the Global NavBar provides a consistent design component throughout the entire Marketplace mall: it contains icons for the Curtain Nav, Search, and the Shopping Cart.

To add or edit the Single Store Header, select the Single Store Header area on the Single Store Layout tab. The Build Your Single Store Header options then appear.



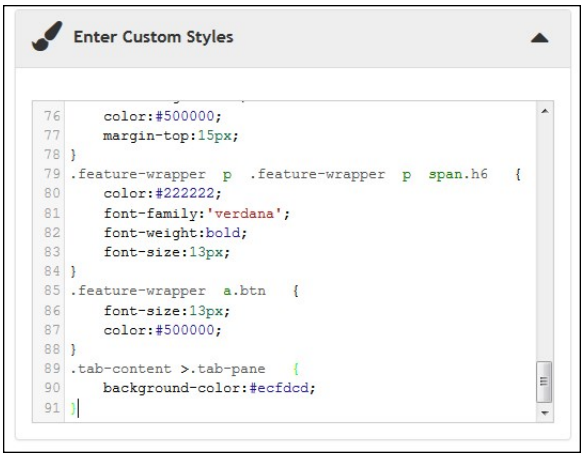
The Build Your Single Store Header options.

The **Enter Custom Content** field includes a large text entry area and a toolbar with various buttons that can be used for adding formatting. You can use the buttons to add styling, images, tables, horizontal lines, hyperlinks, numbered lists, bulleted lists, or block quotes.

Note: When you select the image button, you will be asked for the URL for the image. This URL can reference an image on an external server, or it can point at an image that you have uploaded for use with Marketplace. See **"Editing the Designer Template" on page 186** for more information about URLs/paths.

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You can use the Source button to view the HTML code that will be used with the Enter Custom Content field. You can edit this HTML or add new HTML.



CSS entered in the Enter Custom Styles field can be used by the associated Enter Custom Content field.

The **Enter Custom Styles** field allows you to enter CSS that will be used with your entry in the Enter Custom Content field.

When you select the Save button, **a validation process** takes place. Any HTML code that Marketplace considers to be invalid will not be accepted. A list of errors will be returned. You must fix these errors (or allow the suggested changes) before Marketplace will accept your entry in the Enter Custom Content field. We recommend you become proficient in authoring HTML before you attempt to enter HTML is this field.

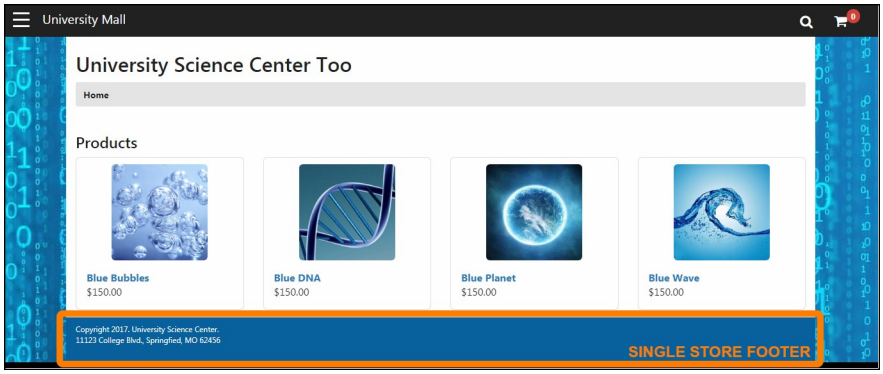
For more information about the allowed HTML and CSS code, see the *Security Validation Guide*.

The Enter Custom Content field and the Enter Custom Styles field each accept up to 50,000 characters.

The Single Store Layout Tab: Single Store Footer

The Single Store Footer is embedded within the Global Footer. This field can be used to add additional content to the footer of your store pages. This content might consist of a simple text message or it might include more complex formatting, even HTML and CSS.

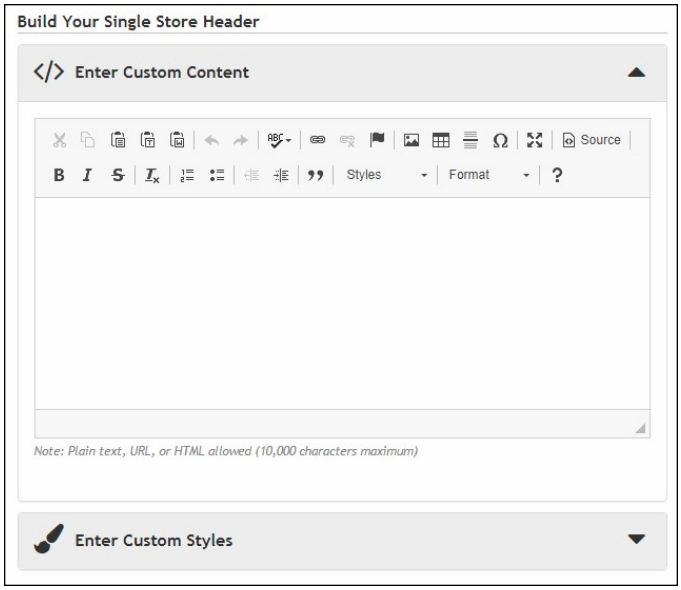
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The Single Store Footer (outlined in orange above) appears above the Global Footer at the bottom of the page.

The Single Store Footer field *will appear on all pages for your store*, unlike the Feature fields, which only appear on your store home page.

The Single Store Footer appears above the Global Footer. To add or edit the Single Store Footer, select the Single Store Footer area on the Single Store Layout tab. The Build Your Single Store Footer options then appear.



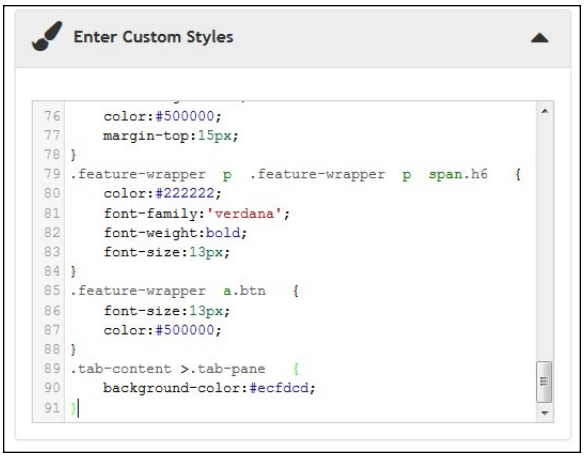
The Build Your Single Store Header options.

The **Enter Custom Content** field includes a large text entry area and a toolbar with various buttons that can be used for adding formatting. You can use the buttons to add styling, images, tables, horizontal lines, hyperlinks, numbered lists, bulleted lists, or block quotes.

Note: When you select the image button, you will be asked for the URL for the image. This URL can reference an image on an external server, or it can point at an image that you have uploaded for use with Marketplace. See **"Editing the Designer Template" on page 186** for more information about URLs/paths.

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You can use the Source button to view the HTML code that will be used with the Enter Custom Content field. You can edit this HTML or add new HTML.



CSS entered in the Enter Custom Styles field can be used by the associated Enter Custom Content field.

The **Enter Custom Styles** field allows you to enter CSS that will be used with your entry in the Enter Custom Content field.

When you select the Save button, **a validation process** takes place. Any HTML code that Marketplace considers to be invalid will not be accepted. A list of errors will be returned. You must fix these errors (or allow the suggested changes) before Marketplace will accept your entry in the Enter Custom Content field. We recommend you become proficient in authoring HTML before you attempt to enter HTML is this field.

For more information about the allowed HTML and CSS code, see the *Security Validation Guide*.

Single Store Branding tab

This tab only appears if you have selected Single Store Mode on the Single Store Settings page.

This tab contains a graphical representation of the Designer layout. As you move your mouse over each component, a black outline will appear around each component that can be configured. You can click on the various components to see the related configuration settings. The components that can be configured include the Global NavBar, Background Settings, Headings, Body Font, Hyperlinks, Buttons, and Footer Brand.

With Feature Pack 8.3, settings that can be overridden from the Universal footer template on the Single Store Branding tab are:

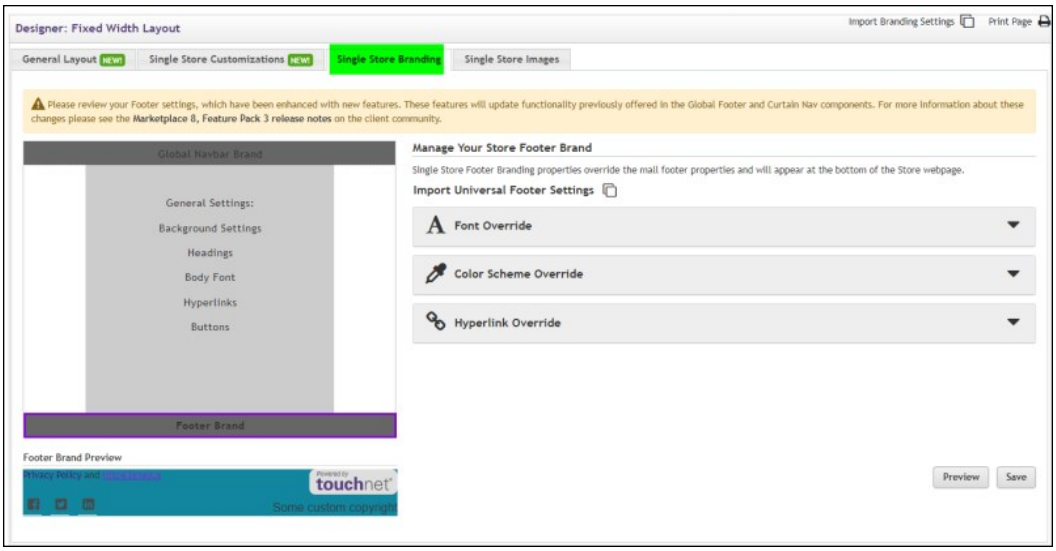
- Overrides for the Mall (or Universal, whichever is enabled) footer's font family, color schemes and hyperlink color schemes.

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Important! Existing customers as of Feature Pack 8.3: If the Mall footer and/or branding layout is desired then remove the single store layout and branding configurations or import the universal footer settings so that the Mall or Universal footer layout and branding links will be used.

Note: When the universal footer settings are used instead of the mall or single store, you will need to re-import anytime the universal footer changes.

- If "custom" settings are desired then update the settings with custom content, URLs or logos.
- Single Store Mall links for Help, Return Policy Label Override or Additional Link(s) will be moved from the curtain navigation to the footer. When configured these links will appear in the footer component. Drag and drop can be used to set the order of the links.
- Single Store Social Media links for Facebook, LinkedIn and Twitter will be moved to the footer component. Drag and drop can be used to set the order of the links.



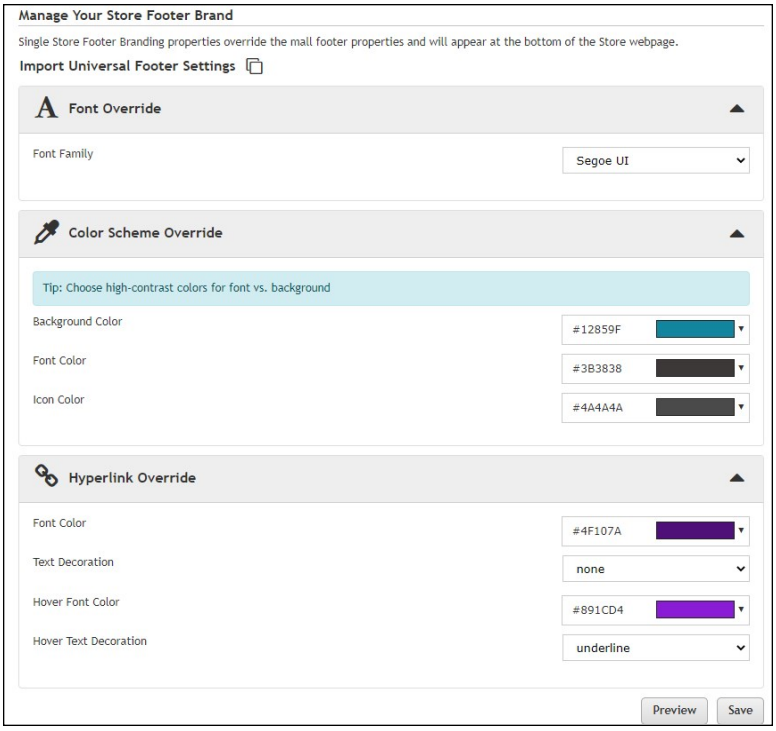
Note: Curtain Navigation and Social Media settings for the stores will be automatically transferred and enabled as a Custom uStores template when Feature Pack 8.3 is installation for existing schools. Schools will be able to access and update these controls after implementation as they desire.

Managing Your Store Footer Brand

The Store Footer options allow you to override the mall footer properties that appear at the bottom of the Store webpage.

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To override the Universal footer options, select the Store area on the Single Store Branding tab. The Build Your Global Footer Brand options then appear.



The Store Footer Brand options.

Two types of options are available: Custom Color Scheme options and Footer Hyperlinks options.

The Customer Color Scheme options affect the color of the footer—its background, its border, its text, and its icons. You make your color selections by using a color picker tool. This tool is activated when you choose the down arrows beside each corresponding button part. The color picker tool also allows you to enter colors in hexadecimal format (e.g., #FFFFFF for white or #E6E6E6 for grey).

The Footer Hyperlinks options affect the hyperlinks that appear within the Store Footer: The following options are available:

- **Font Color**—You make your Font Color selection by using a color picker tool. This tool is activated when you choose the down arrow. The color picker tool also allows you to enter colors in hexadecimal format (e.g., #FFFFFF for white or #E6E6E6 for grey).
- **Text Decoration**—This option can be used to determine whether hyperlinks should be underlined.
- **Hover Font Color**—You make your Hover Font Color selection by using a color picker tool. This tool is activated when you choose the

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down arrow. The color picker tool also allows you to enter colors in hexadecimal format (e.g., #FFFFFF for white or #E6E6E6 for grey).

- **Hover Text Decoration**—This option can be used to determine whether the hover state for hyperlinks should be underlined.

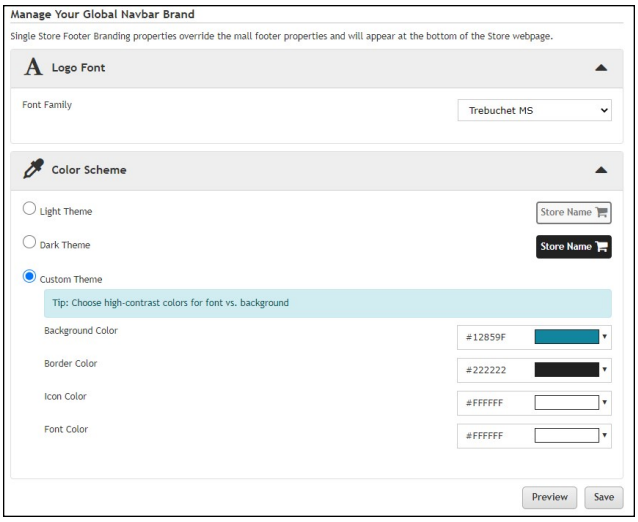
As you make changes to the Store Footer Brand options, the Preview image will show you the result of the changes that you have entered.

Be sure to select the Save button to save your configuration choices. You can also select the Preview button to launch the store in Preview mode.

Managing Your Global Navbar Brand

The Global NavBar always appears as part of your Marketplace store when you use the Designer template layout. The Global NavBar appears at the top of the page and stretches across the width of the page. (You can select a store logo image to be displayed in the Global Navbar by using the Global NavBar options on the Single Store Layout tab.)

To add or edit the Global Navbar, select the Global Navbar Brand area on the Single Store Branding tab. The Build Your Global Navbar Brand options then appear. Separate sections appear for the **Logo Font** and the **Color Scheme**. For each option type that you would like to edit, select the **down arrow** to the right of the corresponding option name. The available options then appear.



The Global Navbar Brand options.

As you plan for modifying the settings, be sure to consider the store logo image on the Single Store Layout tab. The color choices that you make must work well with the logo image that you chose.

One option appears in the Logo Font section:

- **Font Family**—Choose a font from the drop-down list. If you do not upload a store image, the store name will appear in the Global Navbar. Your font name will be used with the store name.

And three options appear in the Color Scheme section. These options control the color scheme for the Global Navbar:

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- **Light Theme**—This color scheme uses a light grey background color, a medium dark gray font & icon color, and black as the border color.
- **Dark Theme**—The default setting. This color scheme uses black as the background color and the border color, and white as the font & icon color.
- **Custom Theme**—If you choose Custom Theme, you can choose the colors for the Nav. The following color options are available:
  - **Background Color**
  - **Border Color**
  - **Font & Icon Color**

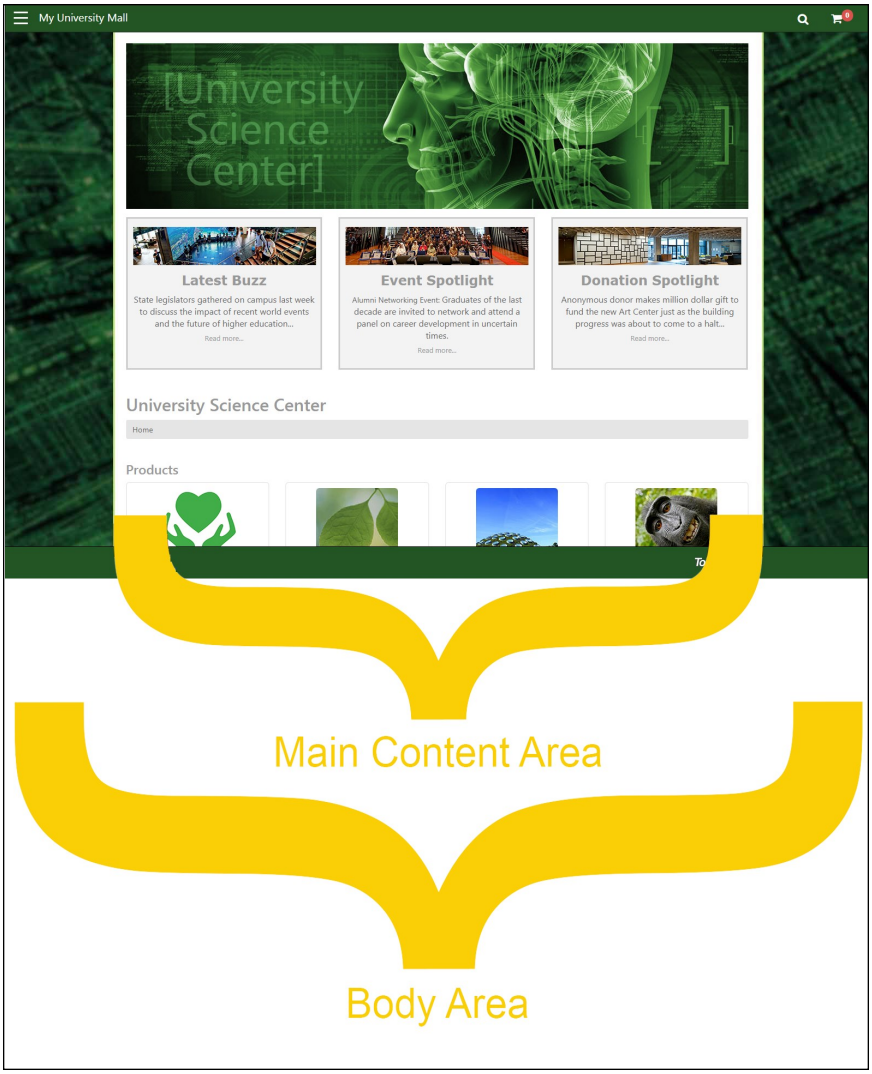
  With each of these color options, you make your color selection by using a color picker tool. This tool is activated when you choose the down arrow for each color option. The color picker tool also allows you to enter colors in hexadecimal format (e.g., #FFFFFF for white or #E6E6E6 for grey).

As you make changes to the Hyperlinks options, the Preview image will show you the result of the changes that you have entered.

Managing Your Background Settings

The Background Settings affect all pages of your Marketplace store. The Body settings and Main Content settings affect the background color and/or image that appears behind the Marketplace store pages. The Body area spans the entire width of the browser while the Main Content area is a fixed 1170 pixels wide and centered horizontally on the page.

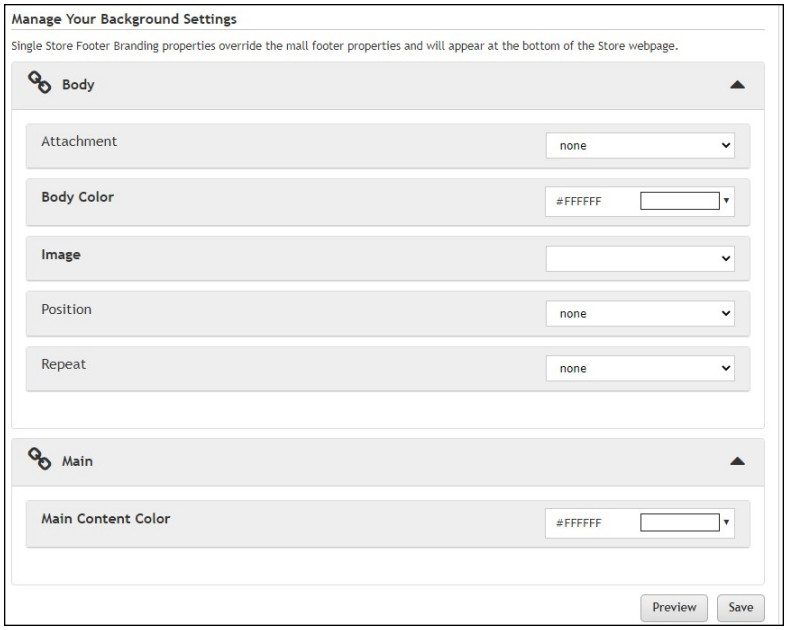
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The body area and the main content area on a store home page.

To add or edit the Background settings, select the Background Settings area on the Single Store Branding tab. The Build Your Background Settings options then appear.

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The Background Settings options.

The following options are available:

- **Body Attachment**—This option determines how the Body Image (optional) will be attached to the page. Of the options available, "none," "scroll," "inherit," "local," and "initial" typically have the same affect: the background image will scroll with the rest of the page. However, "fixed" causes the background image to stay in the same position regardless of whether the page is scrolling (so the page contents will scroll over the "fixed" background image). For people familiar with CSS, this option is the same as "background-attachment" on the Body element.
- **Body Color**—You make your Body Color selection by using a color picker tool. This tool is activated when you choose the down arrow. The color picker tool also allows you to enter colors in hexadecimal format (e.g., #FFFFFF for white or #E6E6E6 for grey). For people familiar with CSS, this option is the same as "background-color" on the Body element.
- **Body Image**—Click this field to see a list of your uploaded images. Select the image that you would like to use as the background image. For people familiar with CSS, this option is the same as "background-image" on the Body element. (If you have not yet uploaded an image, go to the Single Store Images tab and upload your background image. Then return to the Single Store Branding tab.)
- **Body Position**—This option determines where the Body Image (optional) will be attached to the page.
  - **none**—Same as "left top."

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- **left top**—The left edge of the image is placed against the left ledge of the browser window. The top of the image is placed against the top edge of the browser window.
- **left center**—The left edge of the image is placed against the left ledge of the browser window. The vertical center of the image is placed at the vertical center of the browser window.
- **left bottom**—The left edge of the image is placed against the left ledge of the browser window. The bottom of the image is placed against the bottom edge of the browser window.
- **right top**—The right edge of the image is placed against the right ledge of the browser window. The top edge of the image is placed against the top edge of the browser window.
- **right center**—The right edge of the image is placed against the right edge of the browser window. The vertical center of the image is placed at the vertical center of the browser window.
- **right bottom**—The right edge of the image is placed against the right edge of the browser window. The bottom of the image is placed against the bottom edge of the browser window.
- **center top**—The horizontal center of the image is placed at the horizontal center of the browser window. The top of the image is placed against the top edge of the browser window.
- **center center**—The horizontal center of the image is placed at the horizontal center of the browser window. The vertical center of the image is placed at the vertical center of the browser window.
- **center bottom**—The horizontal center of the image is placed at the horizontal center of the browser window. The bottom edge of the image is placed against the bottom edge of the browser window.
- **initial**—Same as "left top."
- **custom X-axis & Y-axis**—You can enter a location with a pixel value or a percentage. The top left corner of the browser window is considered 0 on the X-axis and 0 on the Y-axis. The distance is figured from the default "left top" location.

For people familiar with CSS, this option is the same as "background-position" on the Body element.

- **Body Repeat**—This option determines how the Body Image (optional) will be attached to the page.
  - **none**—Same as "repeat."
  - **repeat**—The image will repeat in both the x (horizontal) and y (vertical) directions and therefore tile across the entire browser window.
  - **repeat-x**—The image will repeat only in the x (horizontal) direction.
  - **repeat-y**—The image will repeat only in the y (vertical) direction.

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  - **no-repeat**—The image appears only once and will not repeat in either the x (horizontal) or y (vertical) directions.
  - **initial**—Same as "repeat."
  - **inherit**—Same as "repeat."

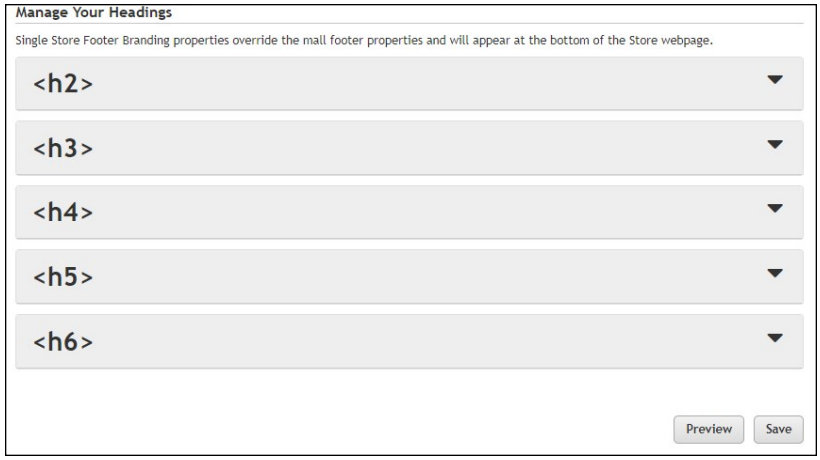
  For people familiar with CSS, this option is the same as "background-repeat" on the Body element.

- **Main Content Color**—You make your Main Content Color selection by using a color picker tool. This tool is activated when you choose the down arrow. The color picker tool also allows you to enter colors in hexadecimal format (e.g., #FFFFFF for white or #E6E6E6 for grey).

Managing Your Headings

The Headings options affect text in the main content area. These settings affect all pages in the Marketplace store.

To edit the Headings, select the Headings area on the Single Store Branding tab. The Build Your Headings options then appear. Separate sections appear for headings <h1> through <h6>. Heading <h1> is the largest heading and <h6> is the smallest. For each heading size that you would like to edit, select the down arrow to the right of the corresponding option name. The available options then appear.



The Headings settings.

The following options are available for each heading size:

- **Font Color**—You make your Font Color selection by using a color picker tool. This tool is activated when you choose the down arrow to the right of the displayed color. The color picker tool also allows you to enter colors in hexadecimal format (e.g., #FFFFFF for white or #E6E6E6 for grey).
- **Font Family**—Choose a font from the drop-down list.
- **Font Size**—Choose a font size from the drop-down list. The sizes are in pixels, from 1 to 48.

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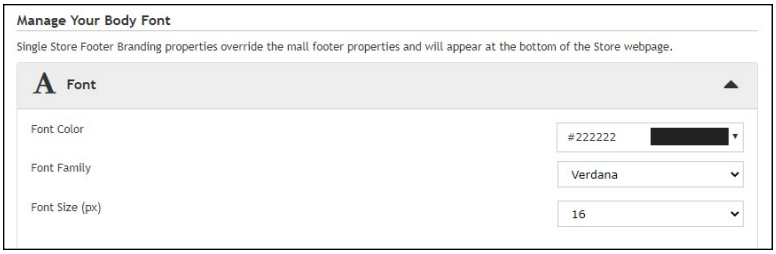
- **Font Weight**—Choose a font weight from the drop-down list. Choices include normal, bold, bolder, and lighter. Numeric font weights are also available for greater control. For example, 400 is normal and 700 is bold.

As you make changes to the Hyperlinks options, the Preview image will show you the result of the changes that you have entered.

Managing Your Body Font

The Body Font options affect the standard body text in the main content area. These settings affect all pages in the Marketplace store.

To edit the Body Font, select the Body Font area on the Single Store Branding tab. The Build Your Body Font options then appear.



The Body Font options

The following options are available:

- **Font Color**—You make your Font Color selection by using a color picker tool. This tool is activated when you choose the down arrow to the right of the displayed color. The color picker tool also allows you to enter colors in hexadecimal format (e.g., #FFFFFF for white or #E6E6E6 for grey).
- **Font Family**—Choose a font from the drop-down list.
- **Font Size**—Choose a font size from the drop-down list. The sizes are in pixels, from 1 to 48.

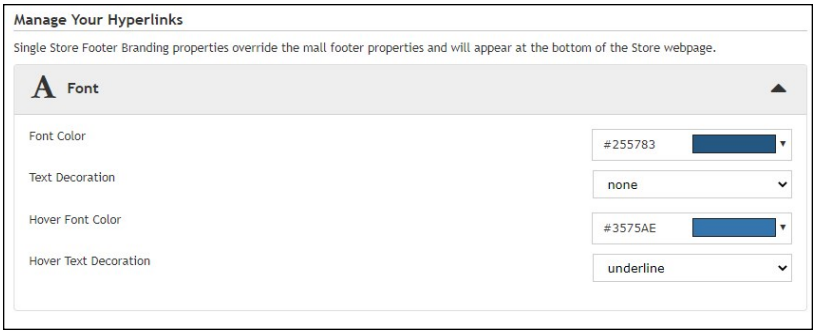
As you make changes to the Body Font options, the Preview image will show you the result of the changes that you have entered.

Managing Your Hyperlinks

The Hyperlinks options affect hyperlinks on pages throughout your Marketplace store. Examples of hyperlinks: product names on category pages or product names on store home pages.

To edit the Body Font, select the Hyperlinks area on the Single Store Branding tab. The Build Your Hyperlinks options then appear.

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The Hyperlinks options

The following options are available:

- **Font Color**—You make your Font Color selection by using a color picker tool. This tool is activated when you choose the down arrow to the right of the displayed color. The color picker tool also allows you to enter colors in hexadecimal format (e.g., #FFFFFF for white or #E6E6E6 for grey).
- **Text Decoration**—This option can be used to determine whether hyperlinks should be underlined.
- **Hover Font Color**—You make your Hover Font Color selection by using a color picker tool. This tool is activated when you choose the down arrow to the right of the displayed color. The color picker tool also allows you to enter colors in hexadecimal format (e.g., #FFFFFF for white or #E6E6E6 for grey).
- **Hover Text Decoration**—This option can be used to determine whether the hover state for hyperlinks should be underlined.

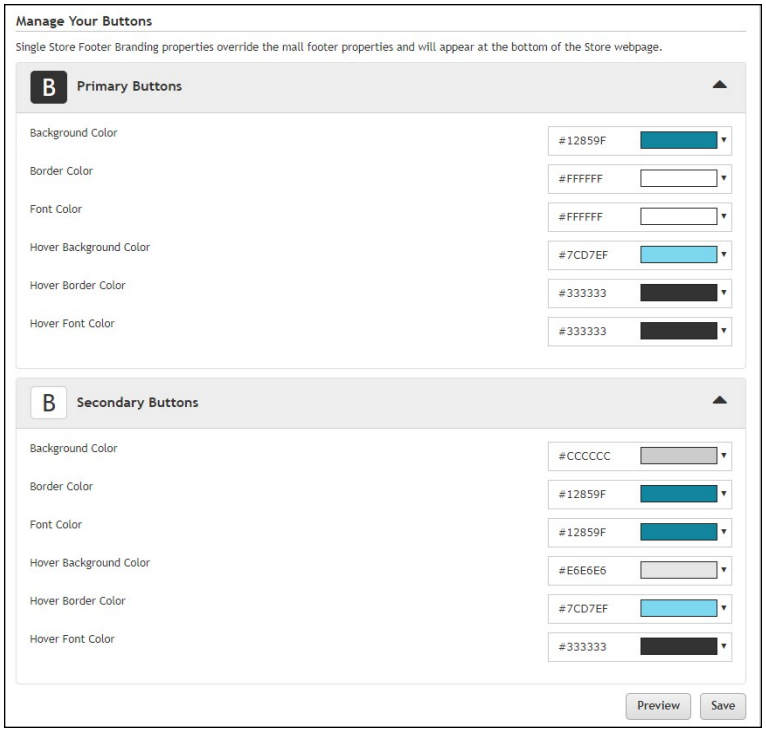
Managing Your Buttons

The Manage Your Buttons options determine how buttons are displayed on pages throughout your Marketplace store. Options are available for two types of buttons: Primary Buttons and Secondary Buttons. For example, the Add to Cart button is a Primary Button. Likewise, the Checkout button in the shopping cart is also a Primary Button and so is the Continue button in the checkout process.

Several other buttons appear that provide secondary functions, such as the Update Cart button and the Continue Shopping button in the shopping cart. These buttons are Secondary Buttons.

To edit the display options for buttons, select the Buttons area on the Single Store Branding tab. The Manage Your Buttons options then appear.

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The Manage Your Buttons options

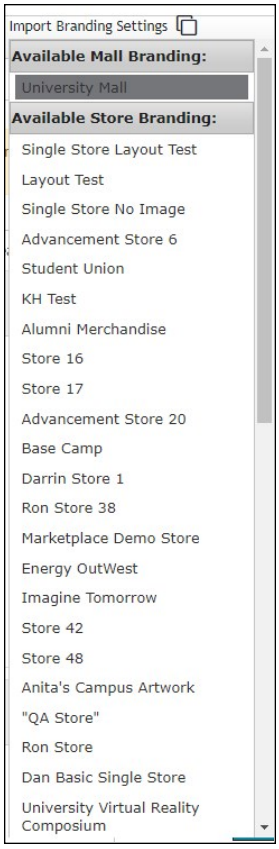
The button options affect the color of the button—its background, its border, and the button text. Separate colors are available for the normal state and the hover state. You make your color selections by using a color picker tool. This tool is activated when you choose the down arrows beside each corresponding button part. The color picker tool also allows you to enter colors in hexadecimal format (e.g., #FFFFFF for white or #E6E6E6 for grey).

As you make changes to the Buttons options, the Preview image will show you the result of the changes that you have entered.

The Single Store Branding Tab: Import Branding Settings

The Import Branding Settings option is available from the upper right corner of the Store Template Setup page when the Single Store Branding tab is selected.

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You can use the Import Branding Settings dropdown list to choose a store for which to import the existing branding settings

When you select the Import Branding Settings icon, a dropdown list appears that lists all the stores in the mall. When you select one of these stores, the settings on that store's Single Store Branding tab will be imported to the active store. These settings include all the areas depicted in the sample image on the left side of the tab, including the Global Navbar Brand, Background Settings, Headings, Body Font, Hyperlinks, Buttons, and Global Footer Brand.

Remember to select the Save button to save the imported settings.

Note: The background image (as configured in the Background Settings) will be copied to the destination store unless a file with the same filename has already been uploaded. In this situation, the existing file will be retained.

The Single Store Images Tab

This tab only appears if you have selected Single Store Mode on the Single Store Settings page.

This tab allows you to upload, manage, and preview images. These images can be used with fields that support HTML or CSS. Examples of HTML fields: the Feature 1 field, Privacy Policy, Site Info, Help, Accessibility ,

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Single Store Header, and Single Store Footer. Examples of CSS fields: Feature 1, Store Header, and Store Footer.

To upload an image, select the Upload New Image button .The Marketplace Image Upload window then appears. Select the Choose File button to navigate to a local or network location and select an image. The image must be in JPEG, GIF, or PNG file format. The maximum file size is 500 KB.

After an image is uploaded, it will be listed on the Single Store Images tab. You can view an uploaded image by selecting the View button for the corresponding image. The selected image will be displayed in the preview area on the right side of the Single Store Images tab.

You can delete an image by selecting the Delete button .

In order to use the images that you upload with HTML entered in the "Custom Content" fields or CSS entered in "Custom Styles" field, you will need to understand how to construct the image path.

Images can be referenced in HTML and CSS by using the following format:

```
/[customer ID]_ustores/web/style_images/store_[store ID]/
     [filename]
```

For example, if your customer ID is C99999, the store ID is 34, and the image filename is "sample.png", then the complete image path would look like this:

```
/C99999_ustores/web/style_images/store_34/sample.png
```

Note: The customer ID is the same as the customer ID that you enter when you log in to U.Commerce Central. (For example, if you enter C99999.jdoe in the User Name field when logging in to U.Commerce Central, then your customer ID is C99999.) And you can get the store number by using the Store General Settings page (or the Marketplace Operations Center's Home Page).

Some browsers can also be used to help determine an image URL. To do this, select the View button for an image on the Single Store Images tab. Then, for example, with Firefox you can right click on the preview image and choose "Copy Image Location," or with Chrome, you can right click on the preview image and choose "Copy Image Address."

If you use a browser to determine an image URL, we recommend you do not include either https or the domain as part of the image path. For example, if your browser gives you the following image path:

```
https://secure.touchnet.net/C99999_ustores/web/style_
     images/store_34/sample.png
```

Then you should use the following the following path in HTML or CSS:

```
/C99999_ustores/web/style_images/store_34/sample.png
```


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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.

Using the Color Picker Tool

A color picker tool is available in several areas within the Designer Template Setup, such as the Single Store Branding tab (including Body Color and Content Color, for example, in Background Settings).



Use the vertical bar on the right side of the color picker to chose a color. Slide this bar up or down until you find the color that you desire. A sample of the selected color then appears, with various black levels and white levels applied in gradients.

You can click within the color sample to choose a particular variation on the color you chose with the slider on the right. To choose a pure version of the color without any white or black levels added, choose the upper right corner. Once you make a selection in the color sample square, you can also click and drag your selection.

You can use the horizontal slider to choose a **transparency** level. The far right side of the slider is the default transparency level of 0% (no transparency), while the far left side of the slider is complete transparency of 100% (in which case no color will be visible). The settings in between allow various combinations of color and transparency.

Note: If you use transparency, your customers will be able to see through the element that you are giving transparency, such as Body Color or the Content Color, so be sure to consider the ramification of making an element transparent.

Your color/transparency selection appears in the small rectangle, with the original color/transparency selection on the left and your new color/transparency selection on the right of this rectangle. The hexadecimal value for the color/transparency selection is also displayed.

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The color and transparency values appear in the following order within the hexadecimal value: transparency level, red, green, and blue. For example, red with mid-level transparency might look like this: #87ff0000. The transparency level appears first in the color picker tool; however, after you save your selection, the transparency level moves to the end of the hexadecimal value (example: #ff000087).

Note: If you want to use this value within Custom Styles (such as with the Feature fields on the General Layout tab), be sure to include the transparency value on the right side of the hexadecimal value, as it appears after to save your selected value.

Important! Be sure to use preview functionality to inspect how your store will be displayed when the Designer template is active.

4.12 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:

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Store User Roles

User Role	What They Can Do
Store Manager	• 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

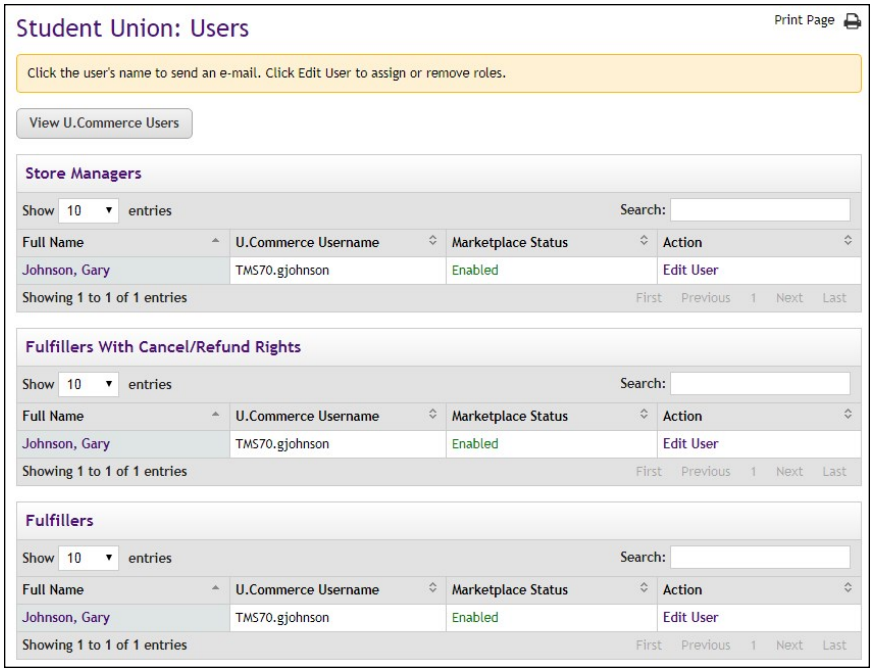
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User Role	What They Can Do
Store Clerk	• Add and edit products in their assigned store and move products among categories
Fulfiller with Refund/Cancel Rights	• Fulfill orders • Refund orders • Cancel orders • For orders made with an ACH payment method, override the waiting period and proceed with fulfillment
Fulfiller	• Fulfill orders
Store Accountant	• View Marketplace financial reports for the store. **Note:** Accountants cannot make any changes to store site settings or assign user roles.

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.



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2 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**"Adding Store Users" on page 222**
- **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, **"Editing Store Users" on page 223**

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.

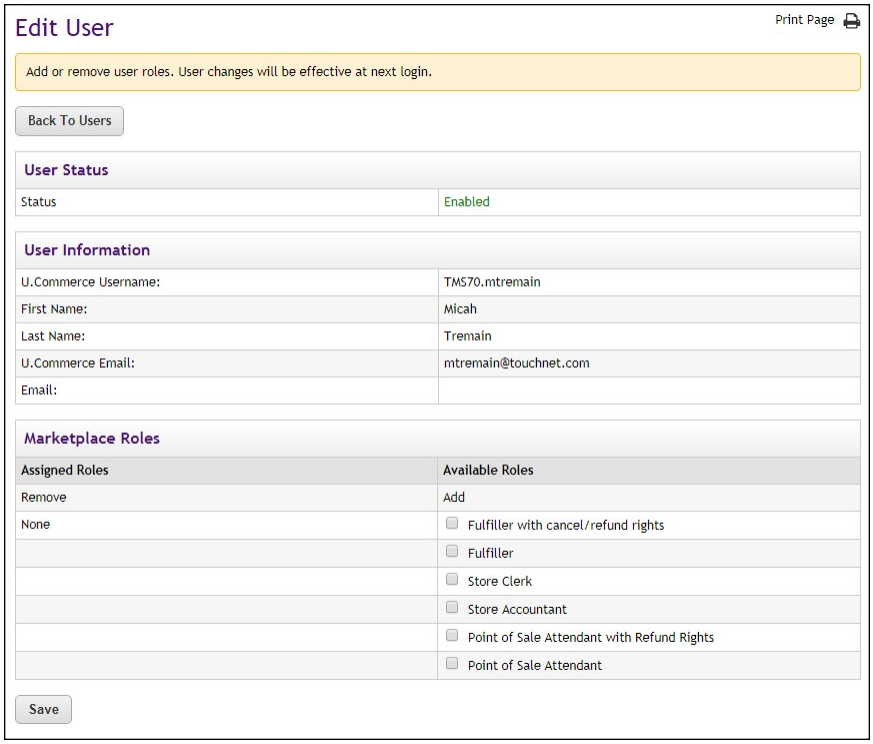
Note: Only a merchant manager or store manager can add store users.

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.

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Note: For more information about the store user roles, see **"Store User Roles" on page 219**.

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

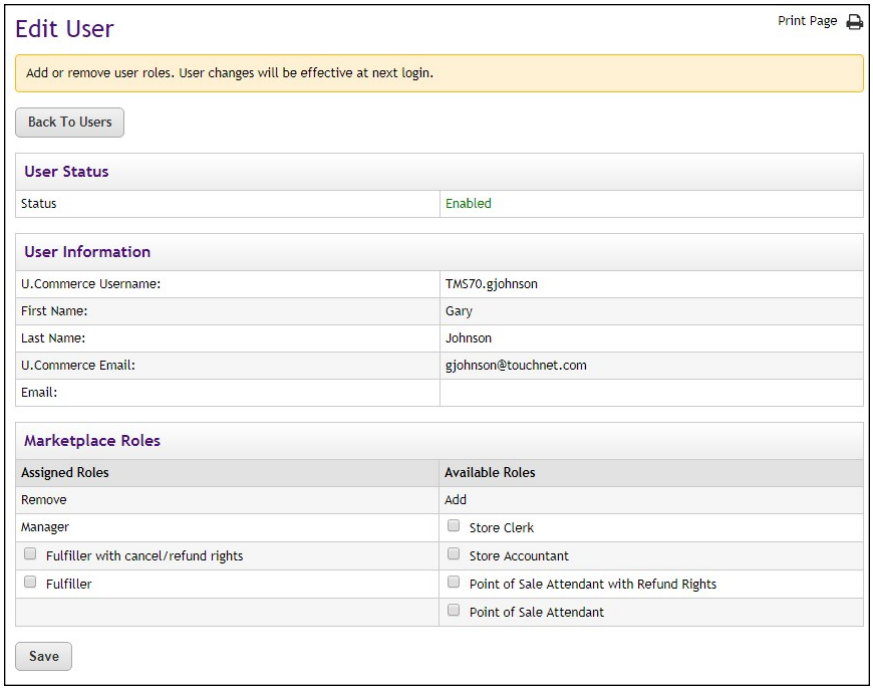
Follow these steps to edit user roles for store managers, store clerks, fulfillers, fulfillers with cancel/refund rights, and store accountants.

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.

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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 12**.

4 Click the Save button.

4.13 Authorized Groups

The authorized groups settings allows users to be authenticated and/or authorized when accessing a store. With these settings you can allow certain groups of users to view and make purchases from your store.

The Authorized Groups menu displays the Registered Users group plus any user group created by your institution. When an administrator selects one of these user groups, that group will be allowed access to the store and can have unique payment methods (which are set on the Payment Methods page).

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Note: With Marketplace 8, the Authorized Groups no longer includes the Everybody group. The Everybody group is now the default store Payment Method on the Payment Methods page.

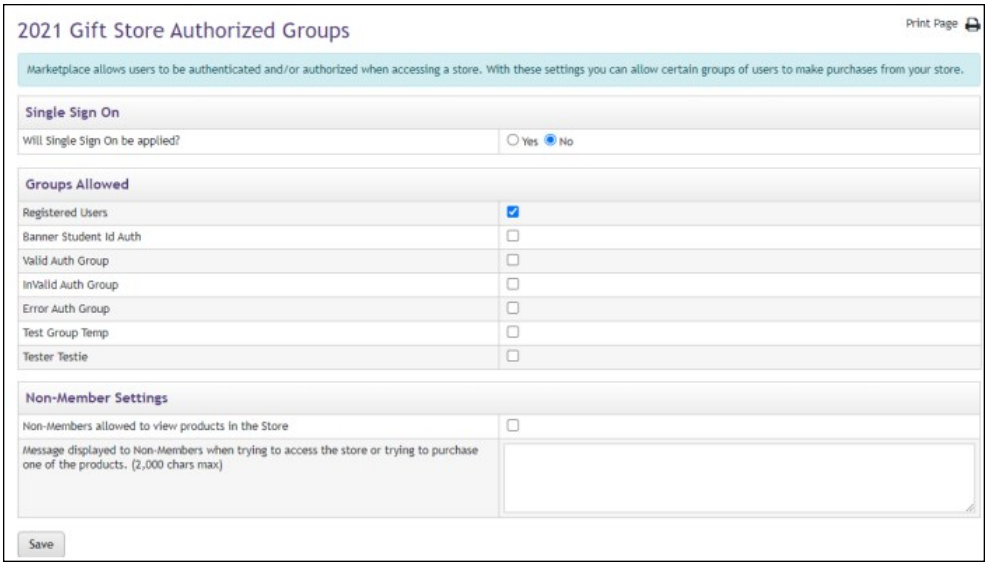
With Marketplace 8, Feature Pack 1, we have implemented SAML2 based single sign on functionality for some private uStores configurations. Please contact your Customer Success Manager to discuss the specifics of your uStores configuration.

Accessing Authorized Groups

Select the following options from the left navigation menu to access the Authorized Groups page and enable single sign on:

[Merchant] > Stores > [Store] > Store Settings > Authorized Groups

The Authorized Groups page for your desired store displays. From this page you can enable single sign on, select authorized users, and create custom messages to display to non-authorized/non-member users.



The Authorized Groups page

Enabling Single Sign On

Select this option to enable Single Sign On functionality for your stores.

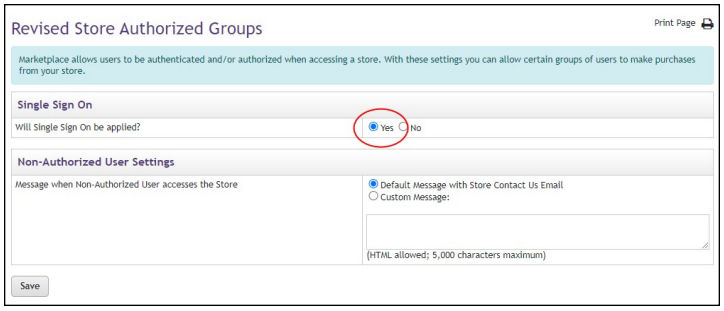
Note: The sections you see on this page are determined by your Single Sign On selection.

Apply Single Sign On? - Yes

Follow these steps to enable single sign on for all users who will have access to your stores.

1. Click the Yes radio button next to the Will Single Sign On be applied? option.

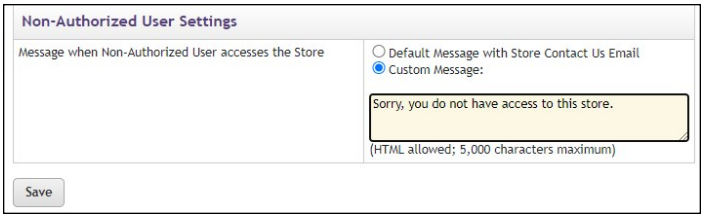
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Single Sign On set to Yes

2 With Single Sign On set to Yes, you will see the Non-Authorized User Settings section. For non-authorized users who attempt to access your store, a default message displays indicating they do not have access to this store. The default message option is pre-selected. You can choose to create your own message.

To create your custom message, click the Custom Message radio button and enter the desired message text in the box provided.



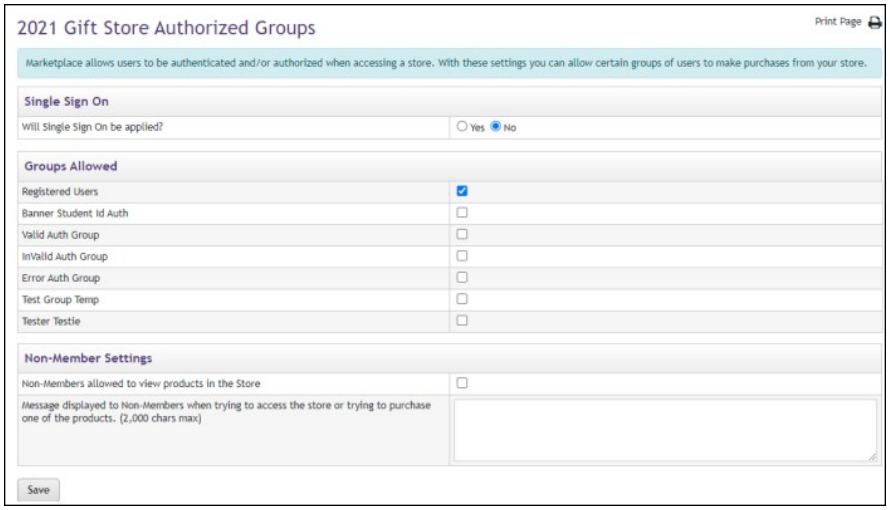
Enter your custom message

3 Click Save.

Apply Single Sign On? - No

By default the No option is selected for applying Single Sign On. If your institution chooses not to enable Single Sign On functionality then you will need to select what groups are allowed to access your stores. Use the Groups Allowed section to select the applicable groups from the list displayed.

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Enable Single Sign On Set to No

Groups Allowed

A "user group" is a category of shoppers. The Groups Allowed section displays the Registered Users group, plus any user groups created by your institution. When an administrator selects (checks) one of these user groups, that group will be allowed access to the store and can select unique payment methods, which are set on the Payment Methods page. (Select the Payment Methods menu option.)

Non-Member Settings

If you want shoppers who are not in the groups allowed to view products, mark the "Non-members allowed to view products in the Store" checkbox.

In the box provided, enter the message that non-members will see when they try to purchase an item.

Click the Save button.

4.14 Payment Methods

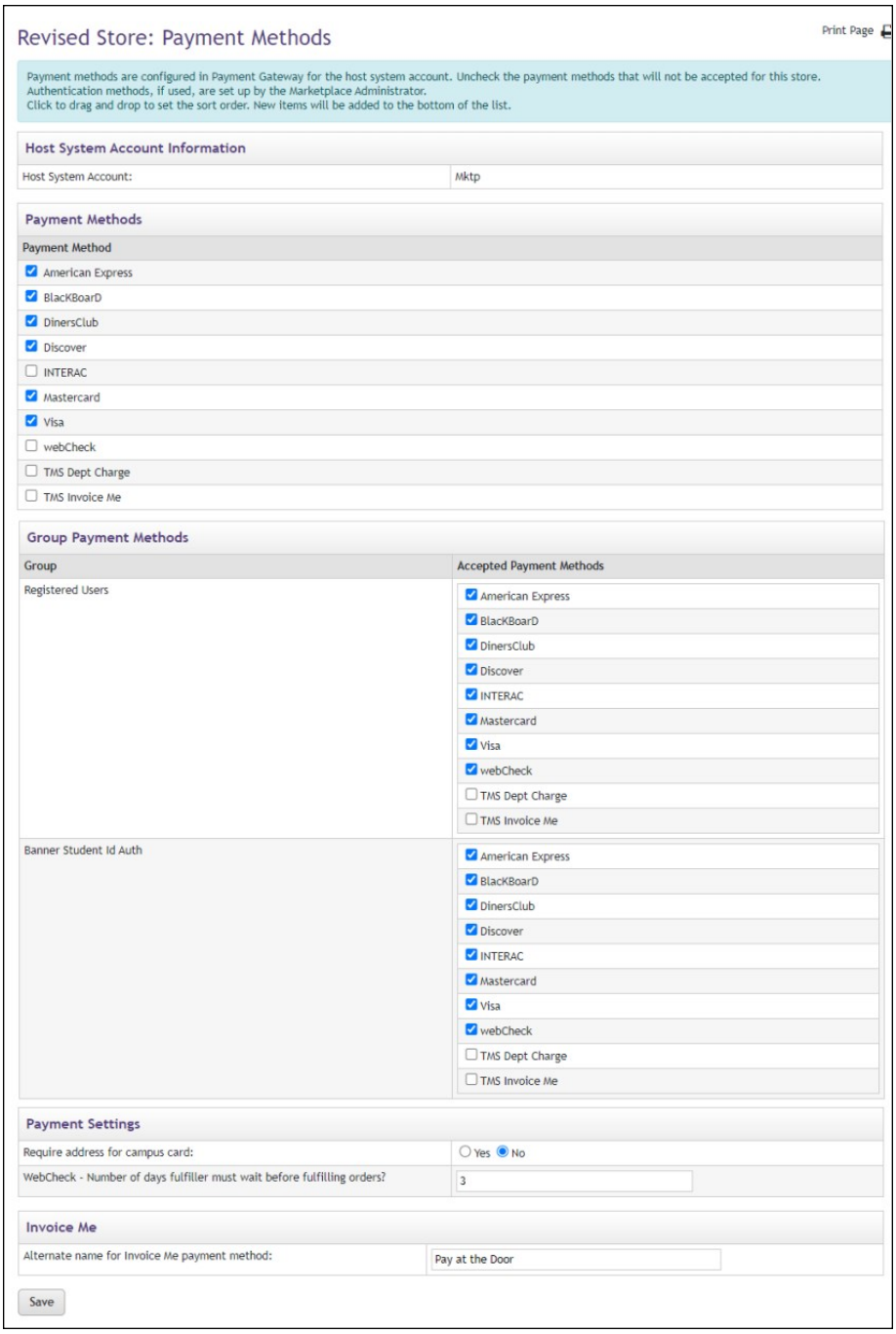
With Marketplace 8, the Payment Methods menu option has been enhanced to allow administrators to set payment methods for the store and authorized user groups. Previously, this menu item set the default payments methods for product creation.

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 access the payment methods page and select the payment method settings for your store and authorized groups.

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From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Payment Methods. The Payment Methods page displays.



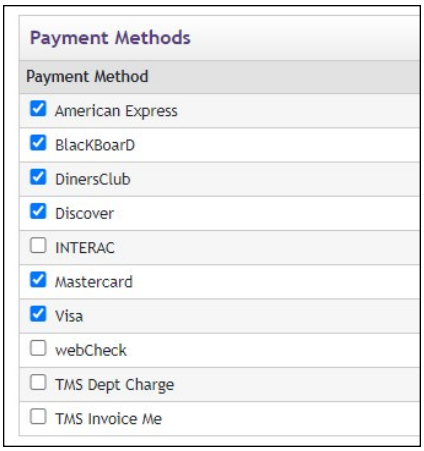
Payment Methods page

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Payment Methods Section

With Marketplace 8, payment methods are now assigned using the Authorized Groups and Payment Methods menu options.

Note: Payment methods are no longer assigned at the product level. The only exception to this is the Invoice Me payment method. Refer to the Product Specific Payment Methods section for additional information.



The Payment Methods section

The payment methods included in this section are pre-selected for the administrators during store creation.

Follow these steps to make any changes to Payment Methods.

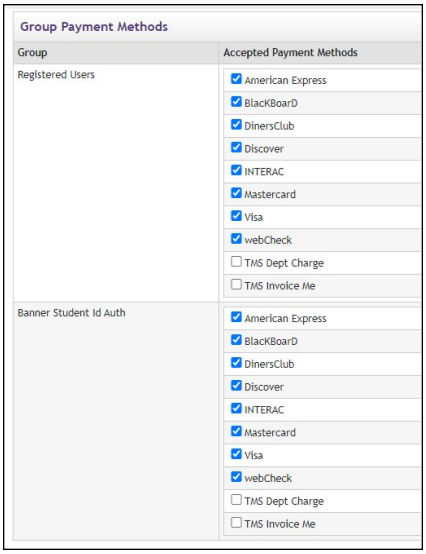
Payment methods for what was previously called the "guest users" group are set under the Payment Methods section.

1. If you do not wish for guest users to have access to the store, you should deselect the payment methods in this section and use the Group Payment Methods section to select which groups you want to have access.
2. By default, the payment methods display in alphabetical order. To change the order of the payment methods, drag and drop the selected payment method to the desired order in the list.
3. To save changes made to this section, click the Save button.

Group Payment Methods Section

The Group Payment Methods section displays the allowed user groups (as determined on the Authorized 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.

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The Group Payment Methods section

If no authorized groups are selected, this section will not display. The payment methods for each group are pre-selected during store creation.

Important! For existing stores, the authorized group payment methods will remain the same as before Marketplace 8.

Follow these steps to make changes to your group payment methods.

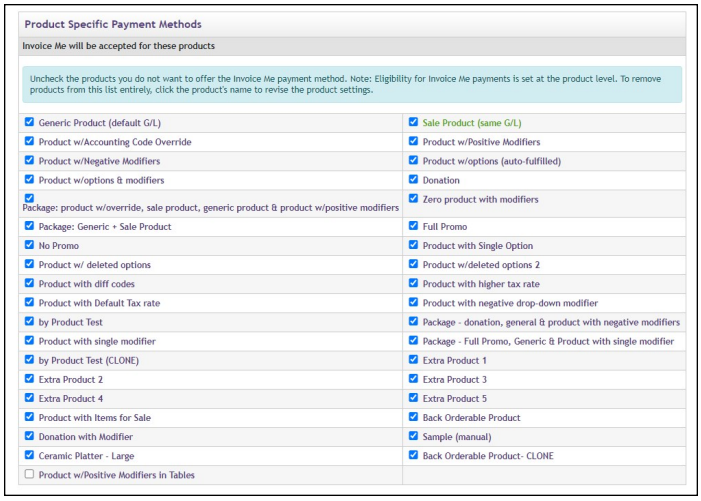
1. To make changes to the accepted payment methods for a group, uncheck or check the box next to the desired payment method for the desired group.
2. Click the Save button to save any changes made to your group payment methods.

Product Specific Payment Methods Section

This section displays if the Invoice Me payment method has been enabled.

Note: For institutions where the Invoice Me payment method has been enabled (on the Product Settings page), Invoice Me will be the only payment methods that can be assigned at the product level.

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The Product Specific Payment Methods section (For Invoice Me)

Note: With Marketplace 8, a new setting has been added to the Product Setting page for the Invoice Me payment method. This new setting, *Is this item eligible for Invoice Me payment method* displays a Yes/No radio button. For any new products, the default is No. Refer to the "Managing Products in a Store" on page 296 for more information.

Important! For existing products that have the Invoice Me payment method selected, the Yes value will be pre-selected.

To make changes to the listing of products, follow these steps.

1. Uncheck the box next to the product(s) that you do not want to offer with the Invoice Me payment method.
2. Check the box next to the product(s) that you want to include with the Invoice Me payment method.

Note: You can select or deselect a payment method in this section to turn on or off the payment method. This allows you to enable a product for the payment method but control the timing of when its applicable (i.e., disallow the payment method 3 days prior to an event).

3. Click the Save button to be sure your changes are applied.

Payment Settings Section

This section will only appear on the page if a campus card has been enabled.



The Payment Settings section

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- If Yes is selected, customers using a campus card for payment will be asked to enter the address of the cardholder.
- The Webcheck-Number of days fulfiller must wait before fulfilling orders? setting has been move to this page from the Product Settings pages.
  - For existing stores, the merchant value will be defaulted to the store setting.
  - When creating a new store, this field will be marked as required before the Payment Methods selections on this page can be saved.

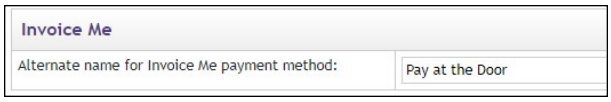
Invoice Me Section

You can modify how the name of the Invoice Me payment method for each uStore that is displayed to customer by entering text in this field.

The Mall default text will auto-populated in this field.

If you change the Invoice Me name for a specific store, the store specific text will be used in the uStores checkout and on receipts. The store specific text will also be used on the fulfillments page and in applicable reports.

Note: If you have a shared cart with multiple stores, the mall text will display at checkout and on receipts.



The Invoice Me section

Notes on Payment Methods

Marketplace uStores accepts payment cards, campus cards, Interac Online, Invoice Me, and electronic check (ACH). In addition, Marketplace accepts the digital wallet service Apple Pay. 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.

Payment Cards Accepted by Marketplace

Credit Card Name	Name Displayed to Buyers
Mastercard	Mastercard
Visa	Visa
American Express	American Express

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Credit Card Name	Name Displayed to Buyers
Discover Card	Discover
JCB	JCB
Diners Club International	DinersClub
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 payment card names displayed to customers are predefined in Payment Gateway and are not editable.

With Marketplace 8, the Payment Methods menu item as been enhanced to allow administrators to set payment methods for the store and authorized user groups. Previously, this menu item set the default payment methods for product creation.

Important! For existing stores, the authorized group payment methods will remain the same as before the Marketplace 8 enhancement.

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 payment card.

Important! The Discover Network requires that all merchants that accept the Discover Card must also accept Diners Club, JCB, 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.

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Campus Cards Accepted by Marketplace

Campus Card Name	Name Displayed to Buyers
CBORD	Configurable in Payment Gateway
Blackboard	
OneCard	

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.interaconline.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

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buyer must enter a Banner detail code in order to complete the transaction. For more about Departmental Charge, see **"Using Departmental Charges" on page 635**.

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 152**. For these fields to appear, Invoice Me must be activated on the Administrative General Settings page, as described in **"General Settings" on page 36**.) When a payment is received, a fulfiller can update the payment status of an Invoice Me order.

Digital Wallets supported by Marketplace:

Name of Digital Wallet	Name Displayed to Buyers
Apple Pay	Apple Pay appears as a payment method option on the Payment Method page of the uStores checkout process. Apple Pay only appears as an option for buyers who are using the Safari browser on an Apple device.

Buyers can select Apple Pay from the Payment Method dropdown list. When Apple Pay is selected, a pop-up window appears in which the buyer's Apple Pay profile is opened from the configuration on the Apple device. This profile on the Apple device must already exist in order for Apple Pay to be available as a payment method.

Also, in order to be available as a payment method, the Payment Gateway host system account for the Marketplace merchant must have been configured to include Apple Pay. There is no configuration within Marketplace that determines whether Apple Pay will be available beyond the selection of the Payment Gateway host system account.

Apple Pay does not appear as a payment method in the following situations: 1) when the user's shopping cart contains multiple items and two or more of those items have a different set of available payment methods, and 2) when the customer has chosen to use recurring payments.

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4.15 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.

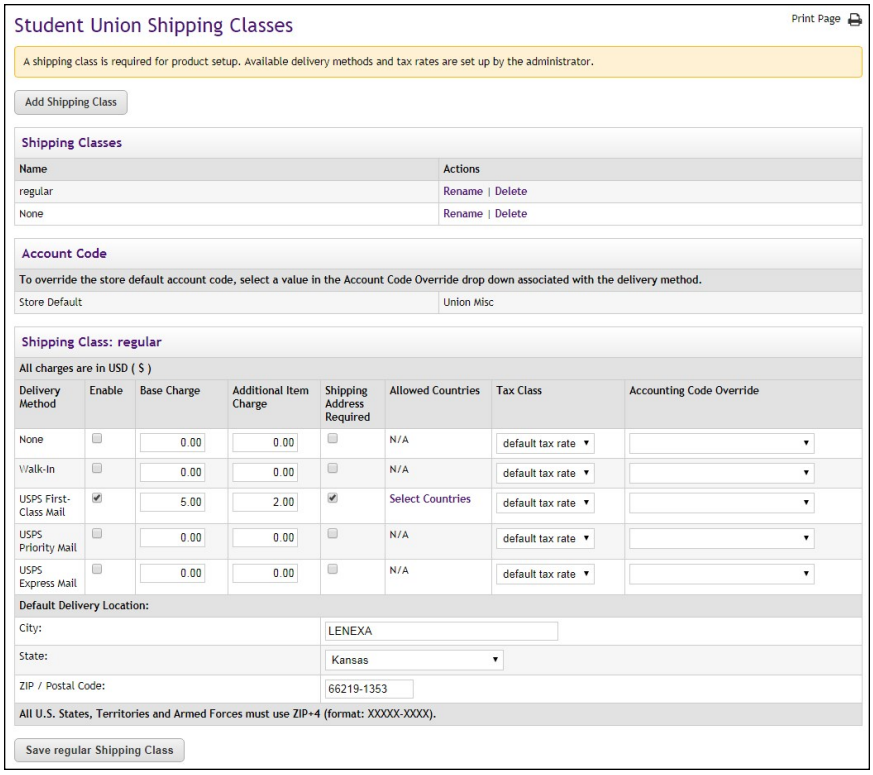
When you set up shipping classes for a store, you will be asked to enter a default delivery location. This delivery location is used for calculating tax on products that do not require delivery, such as seminar registrations. This delivery location will also be used for delivery options such as "will-call," 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.

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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.

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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 many 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 55**.

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.

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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 52**.

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 a 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.

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As with any tax situation, you should contact your tax consultant to determine the applicable taxes.

Changing Delivery Methods

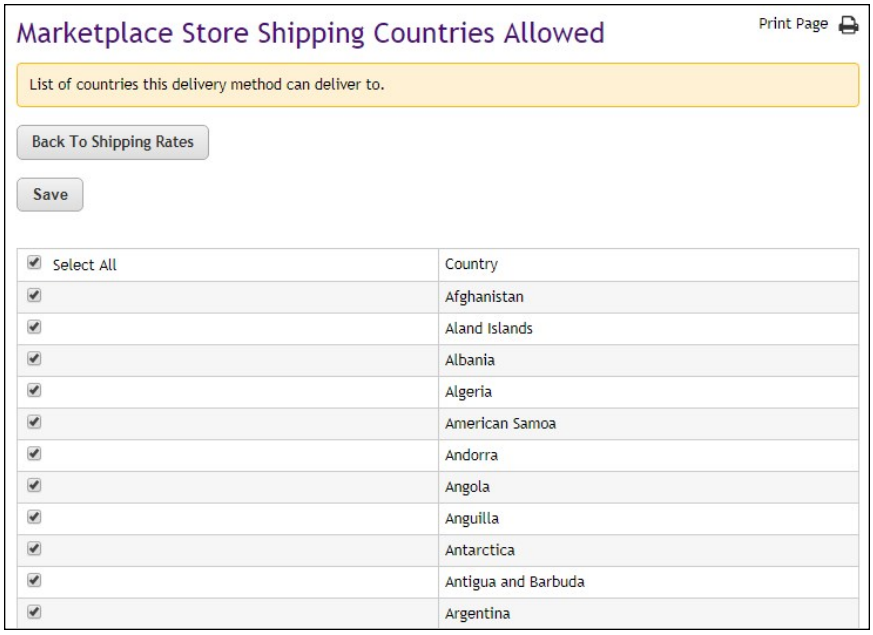
In each shipping class, you have enabled the delivery methods a shopper might use for shipping products. Delivery methods are added by an administrator for the entire site. If you need additional delivery methods, contact a Marketplace administrator.

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.



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.

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About Address Validation

When customers enter a delivery address, that address goes through an address validation process. This process takes place regardless of whether or not the store is using the tax service. For more about the address validation process, see **"Address Validation and ZIP+4" on page 269**.

4.16 Store Product Categories

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

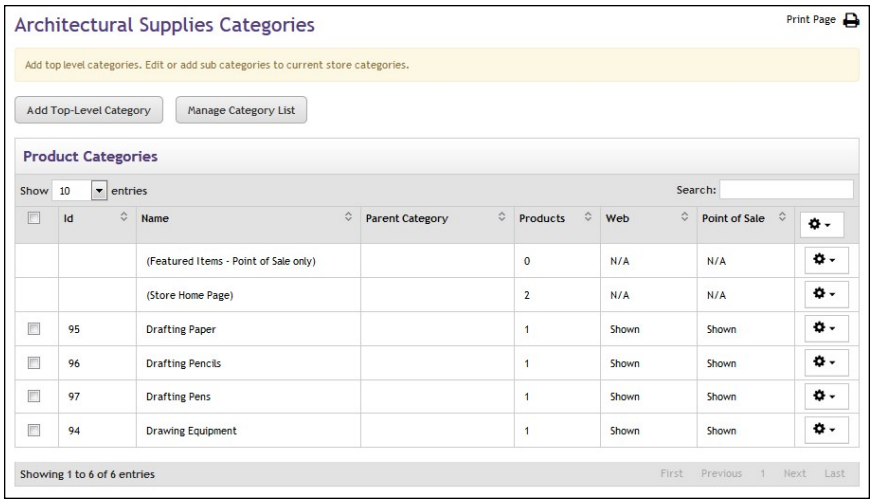
Store categories and subcategories let you group your products any way you want within your store. Later, when you add products, you will place each product in a store category or subcategory. This makes your category names important.

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.

Adding a New Product Category

Follow these steps to set up a product category for your store.

1. From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Categories. The Category Settings page appears.



2. To add a new top-level category, click the Add Top-Level Category button. This page then appears.

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Enter the category name and choose a layout for the category page:

- **Detail Layout**—The shopper sees product 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 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.
- **Name and Price Layout**—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.

Changing the Category Listing Order

Follow these steps to change the the order in which categories are listed on your store's home page.

1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Categories. The Category Settings page appears.

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



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3 By default, the categories are listed in alphabetical order. To change the category order, click on the desired category and drag and drop it to the desired order in the list.

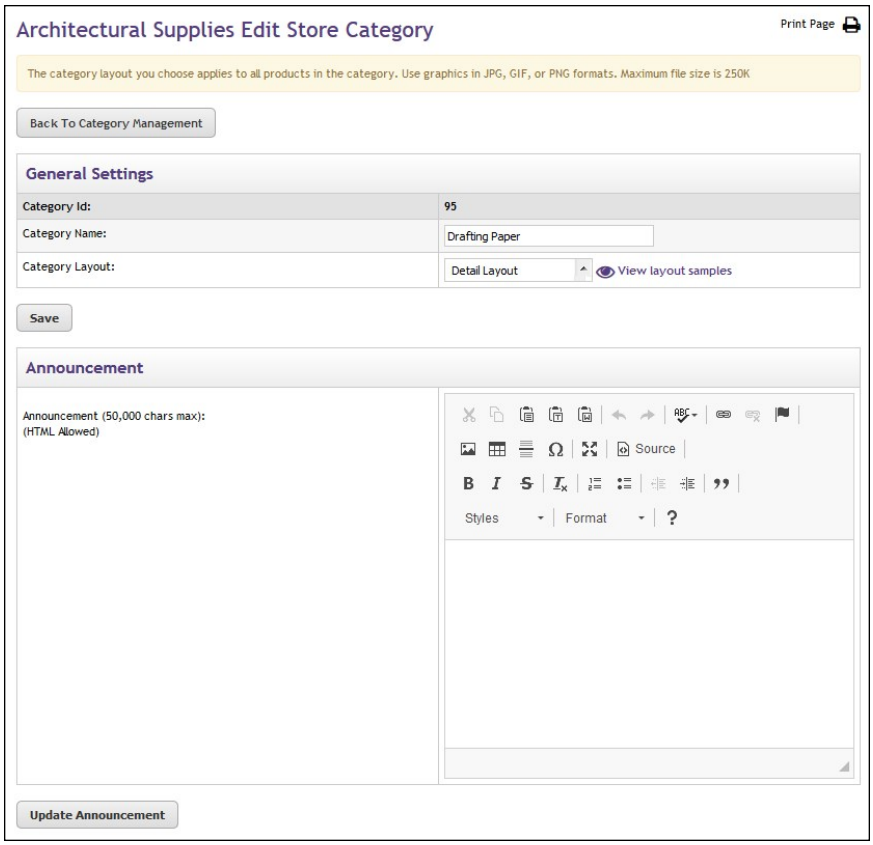
4 Click the Save button.

Editing a Product Category

Follow these steps to set up a product category for your store.

1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Categories. The Category Settings page appears.

2 Click the Gear icon for the category you want to set up and select Edit from the flyout menu. The Edit Store Category page opens.



This page contains fields for the Category Name, the Category Layout selection, the Announcement, images, and the product sort order.

Note: For sub-categories, the Parent Category field also appears on this page.

3 You can edit the **Category Name**.

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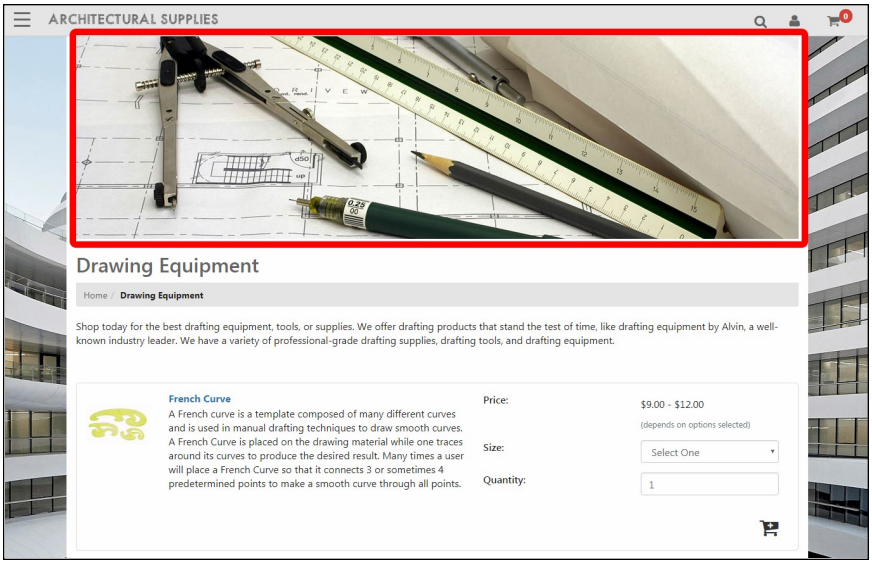
4 You can select a **Category Layout**. (See "Adding a New Product Category" above for descriptions of these layout choices.)

5 If you change either the Category Name or the Category Layout fields, be sure to select the Save button.

6 You can enter an **Announcement** for the category. (See "Adding an Announcement" below for more details.)

7 If you enter an Announcement, be sure to select the Update Announcement button.

8 You can upload **Images** for this category. These images include the Hero Image and Tile Image . If you would like to add an image, select the Upload button for the corresponding image type.



When uploaded, a hero image (outlined above in red) appears at the top of the product category page in uStores.

9 You can change the order that the products will be displayed in this category by using the Product Sort Order section. Drag and drop the product names to change the sort order.

10 If you change the sort order, be sure to select the Save button.

Adding an Announcement

The Announcement field only appears when the Designer template is active.

The Announcement field includes a large text entry area and a toolbar with various buttons that can be used for adding formatting. You can use the buttons to add styling, images, tables, horizontal lines, hyperlinks, numbered lists, bulleted lists, or block quotes.

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Note: When you select the image button, you will be asked for the URL for the image. This URL can reference an image on an external server, or it can point at an image that you have uploaded for use with Marketplace. See **"Store Product Categories" on page 241** for more information about URLs/paths.

You can use the Source button to view the HTML code that will be used with the Announcement field. You can edit this HTML or add new HTML.

When you select the Update Announcement button, a validation process takes place. Any HTML 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 entry in the Announcement field. We recommend you become proficient in authoring HTML before you attempt to enter HTML is this field.

For more information about the allowed HTML code, see the *Security Validation Guide*.

The HTML that you enter can reference images. You can upload images by using the Images tab of the Designer template.

The Enter Custom Content field accepts up to 50,000 characters.

Changing the Availability of a Category

By default, categories are set to display as part of uStores as soon as one or more product have been added to a category. However, you can also choose the Hide option, which will hide the display of that category.

Change Web Availability is available from the Gear flyout menu for each category that has been created (but not for the Store Home Page).

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 5.3 , "Managing Products in a Store" on page 296).

Add Sub-Category is available from the Gear flyout menu for each category that has been created (but not for the Store Home Page).

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 out of the category; then the Delete option will appear in the Gear flyout menu for this category.

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Image Specifications

- You can only use GIF, JPG, or PNG format images.
- Category hero images are best displayed at 1140 pixels wide by 320 pixels high.
- Category tile images are best displayed at 400 pixels wide by 400 pixels high.
- 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

If some circumstances, you may choose to provide your customers with a direct link to one of your store categories. For example, the link might be used in an e-mail message or on a campus portal web page.

The easiest way to determine the URL for a store category is to navigate to that store through the Marketplace mall after enabling the store. You can then copy the URL that appears in the address field of your browser.

However, if the store has not yet been enabled, you won't be able to visit it by navigating from the Marketplace mall. In this situation, you must understand the format of the store URL. The URL for a store category uses the following format:

> https://[subdomain.domain name.top-level domain]/[customer number]_ustores/web/store_cat.jsp?STOREID=[store ID#]&CATID=[category ID#][&SINGLESTORE=true]

[subdomain.domain name.top-level domain] is typically secure.touchnet.com or secure.touchnet.net or another value determined by your school. This value is consistent for all your stores.

[customer number] is unique for each school. This value is determined by TouchNet, and it's consistent for all your stores.

[ID#] is the Store ID given by the Marketplace Operations Center when the store was established. This value is available in the Marketplace Operation Center on the store's General Settings page.

[category ID#] is the category ID assigned by Marketplace. The category ID value can be determined by viewing the Store Categories page in the Marketplace Operations Center: You can find the category ID in the ID column.

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[&SINGLESTORE=true] is necessary if you have turned on single-store mode for your store and you want customers to see your store displayed with single-store mode customizations.

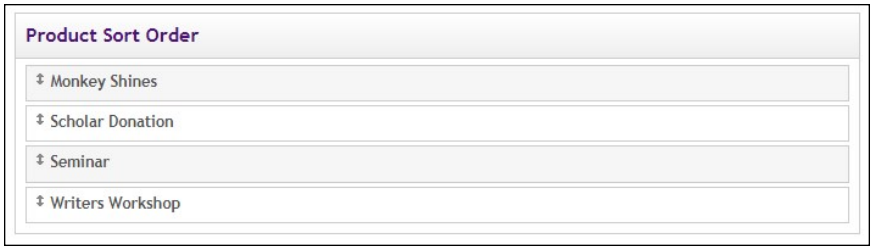
Note: STOREID, CATID, and SINGLESTORE must be in uppercase. These parameter names are case sensitive.

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.

QR Codes

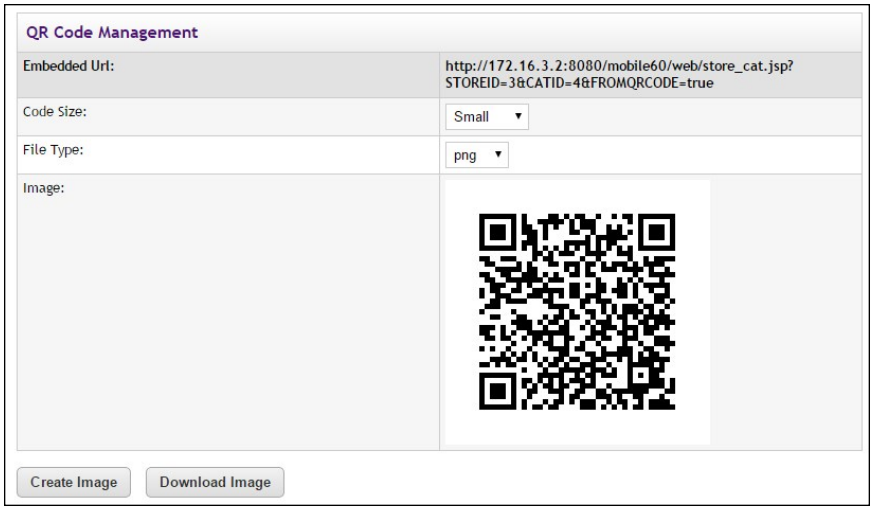
The QR Code Management section allows you to generate a QR code that can be downloaded for use on printed material. The QR code represents a URL for a store-level product category page. The QR code can be used in printed material, such as a magazine or a sign or product packaging or a business card or almost any object about which users might need information. The main use of QR codes comes in smart phone applications that use a camera to photograph the QR code. The application interprets the QR code and links to the targeted web page by opening a web browser installed on the smart phone.

Note: The QR Code Management section of the Store Category Settings page only appears if Mobile Marketplace has been licensed.

To generate and download a QR code, follow these instructions:

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1. In the left navigation menu, go to Marketplace Home > [Merchant] > [Stores] > [Store Name] > Store Settings > Categories. The Store Category Settings page appears.
2. Choose the Edit link for one of the category names.
3. Scroll to the bottom of the page so that the QR Code Management section is visible.



4. Choose Small, Medium, or Large from the Code Size dropdown menu.
   - Small—Size: 250 pixels wide by 250 pixels high.
   - Medium—Size: 350 pixels wide by 350 pixels high.
   - Large—Size: 550 pixels wide by 550 pixels high.
5. Choose png, pdf, jpeg, gif, or bmp from the File Type dropdown menu.
6. Choose the Create Image button.

   The QR Code image then appears in the Image box.

   Note: The URL associated with the QR Code appears in the Embedded URL field.
7. Choose the Download Image button to initiate the download of the image.
8. Save the file to the location of your choice.

4.17 Creating Promotions

A promotion is a limited-time price discount that a store manager applies to a store, a product category, an individual product, or a specified order

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amount. This discount may be a percentage off the regular price or a specified dollar amount off the regular price.

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. When you use a promotional e-mail, you should include the promotion code in its text.

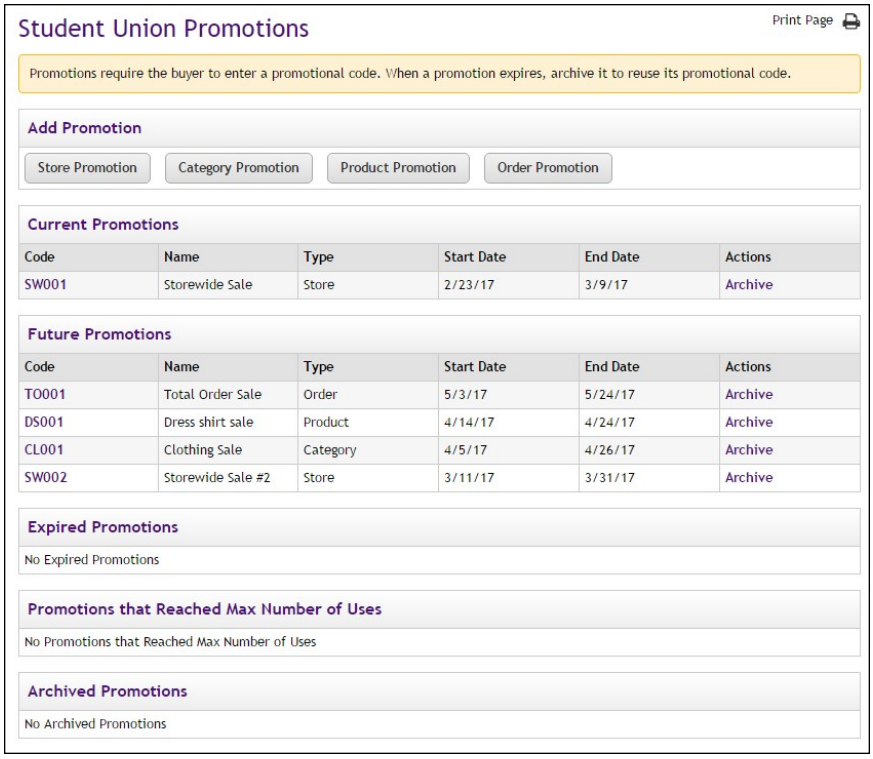
To advertise promotions in the store's pages, you might change the store's special announcement, change product descriptions, or link the store's splash image to a promoted category (or product).

Important! Promotions cannot be used with donations.

Creating a New Promotion

The following steps describe how to create a new promotion. 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.



The Promotions page shows current, future, expired, and archived promotions.

Buttons for the available promotion types appear in the Add Promotion section.

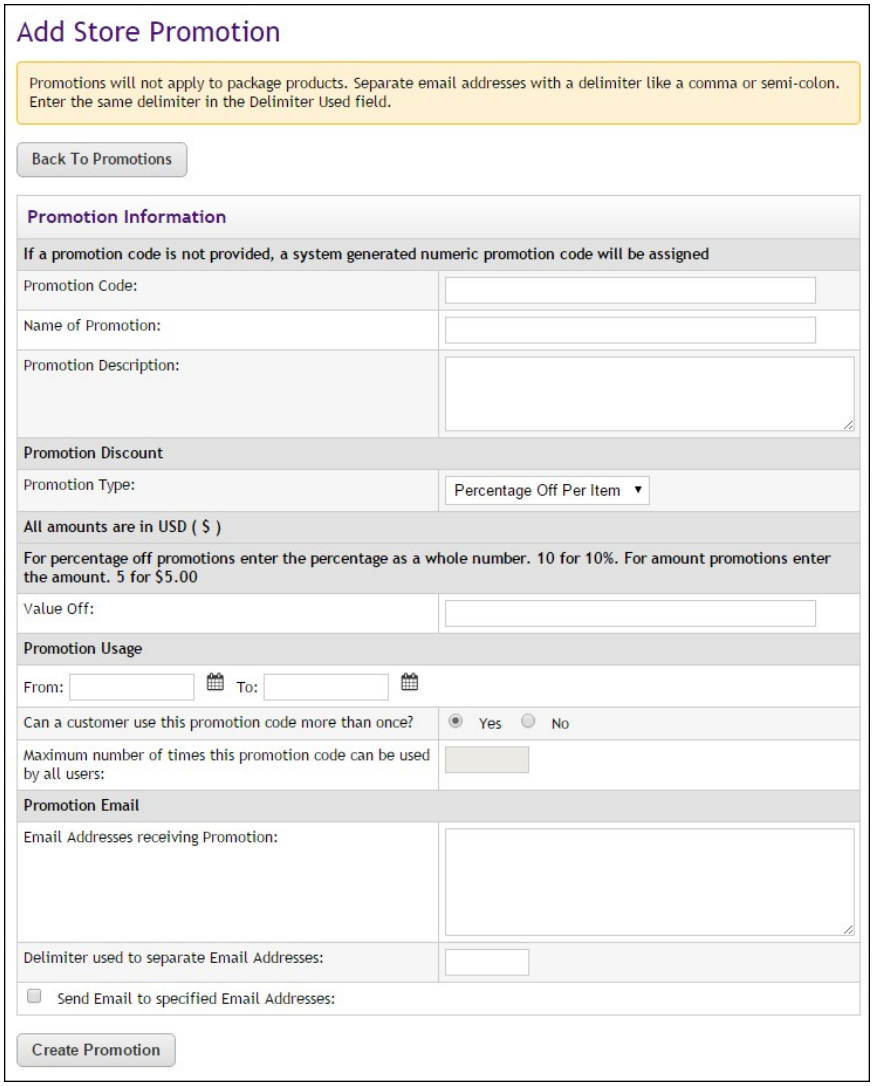
2 Choose a promotion type by selecting the corresponding button.

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The following promotion types are available:

- **Store Promotion**—This promotion type will apply to all products in this store.
- **Category Promotion**—This promotion type will apply to a specified product category for this store.
- **Product Promotion**—This promotion type will apply to a specified product for this store.
- **Order Promotion**—This promotion type will apply when a specified dollar amount is reached for all items in the order for this store.

After you select a promotion type, the Add Promotion page appears for the promotion type. If you chose a Store Promotion, the following page appears.



The Add Store Promotion page.

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3 Enter the promotion info for the promotion.

The following fields are available:

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 Per Item or Amount Off Per Item. For store-wide promotions, only Percentage Off Per Item 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.

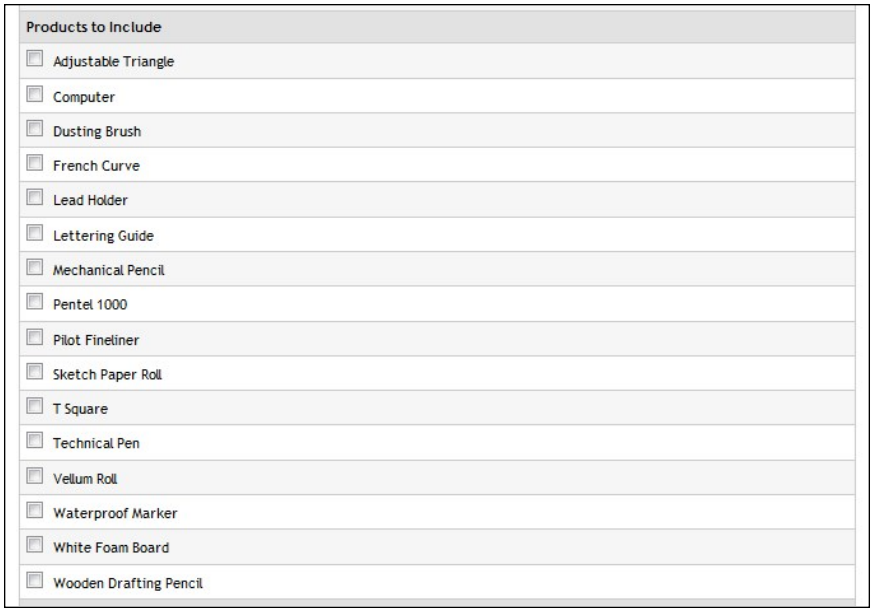
Order Must be More Than
(Only appears for Order Promotions) Dollar amount ...

Promotion From [Date] and To [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.

"Can a customer use this promotion code more than once?" and "Maximum number of times this promotion code can be used by all users"
Select Yes to allow a shopper to use the promotion more than once. To restrict shoppers to one-time use of the promotion, select No. If you select No, you can enter a number in the "Maximum number of times this promotion code can be used by all users" field. After this maximum number of promotion uses is reached the promotion will no longer be available.

Products to Include
(Only appears for Product Promotions) The Product Promotion screen has exactly the same fields as the Store Promotion, plus an opportunity to choose which products the promotion applies to:

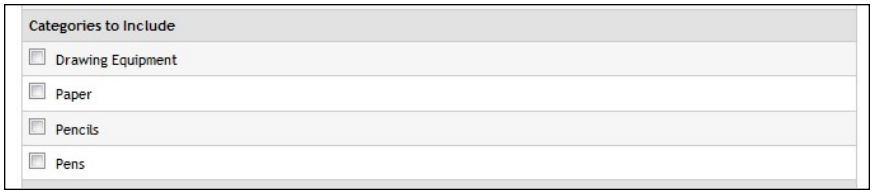
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Note: Packaged products have their own system for offering discounts and thus are not available when you create a product promotion. Donation products do not appear in the "Products to Include" list. Promotions cannot be used with donations.

Categories to Include

(Only appears for Category Promotions) The Category Promotion screen has exactly the same fields as the Store Promotion, plus an opportunity to choose which categories the promotion applies to:



"Email Addresses receiving Promotion" and "Delimiter used to separate Email Addresses"

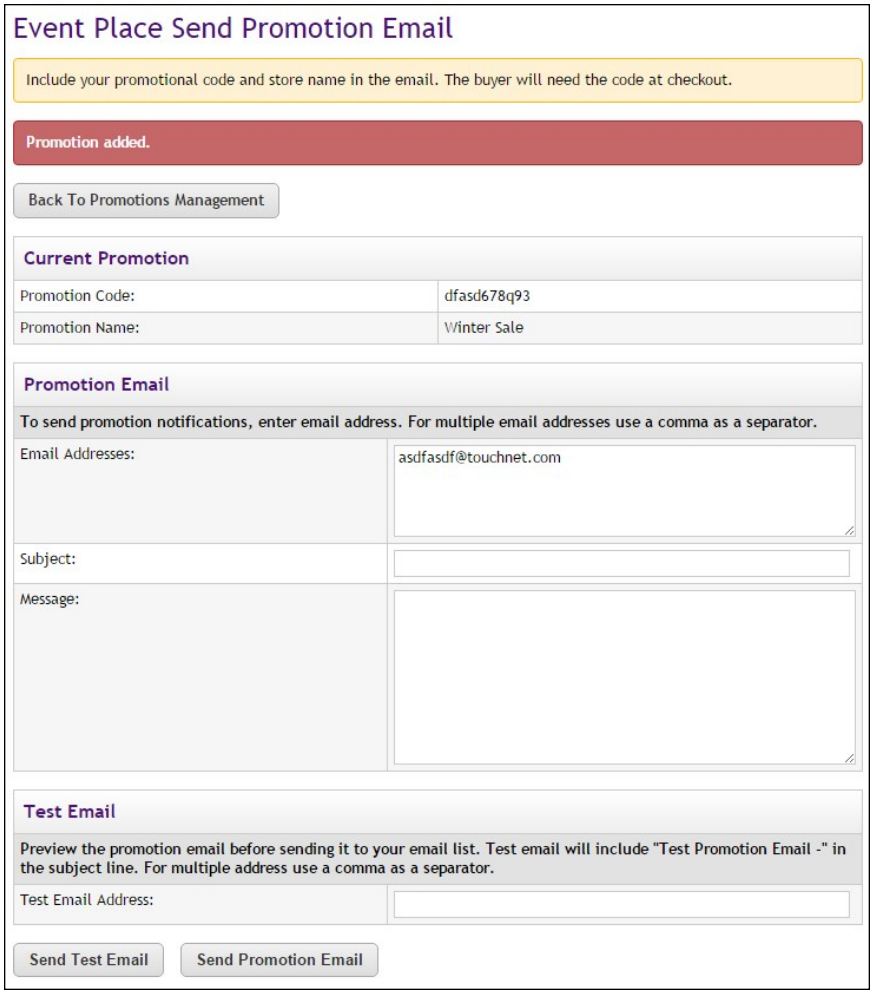
(Optional) If you want to send an e-mail about the promotion, enter the destination e-mail addresses, separating each address with a delimiter (for example, a comma). Specify the delimiter character in the Delimiter field. Select the "Send E-mail to specified Email Addresses" checkbox to go directly to the Promotions e-mail page after you create the promotion.

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Important! If you would like to send e-mail messages with your promotional campaign, you MUST enter at least one e-mail address in the "Email Addresses receiving Promotion" field. If you do NOT enter an e-mail address, then the e-mail fields will NOT subsequently be available when you edit the promotion.

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

5 If you chose to send a promotional e-mail (by selecting the "Send Email to specified Email Addresses" checkbox), the Send Promotion Email page appears.



Complete the following fields:

Email Addresses

Enter the e-mail addresses for everyone who should receive the promotion message. Use a comma to separate the e-mail addresses.

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Note: Notice the e-mail addresses that you entered on the previous page are carried over to this page. However, whatever character you entered as the delimiter character has been changed into a comma.

Subject

Enter a subject for the promotion message.

Message field

Enter the text for the promotion message. This field does not accept HTML. Only enter text in this field.

Test Email Address

You can enter one or more e-mail addresses in the Test Email Address field. Then select the Send Test Email button to send a test e-mail to to the e-mail addresses that you specified. By using test e-mail addresses, you can see how the message will look.

When you are finished and ready to send the promotion message, select the Send Promotion Email button.

About Using Promotional Codes with Stores in Single-Store Mode

If your store is in single-store mode, you should make sure the display of promotional codes has not been turned off. "Show Promotional Code" on the Single Store Settings page is set to Yes by default; however, a user with the store manager or merchant manager role can select No for this setting, in which case promotional codes will not be displayed. If you create a promotional code and it is not displayed during the checkout process, please check the "Show Promotional Code" setting on the Single Store Settings page.

Tips for Drafting a Promotional E-mail Message

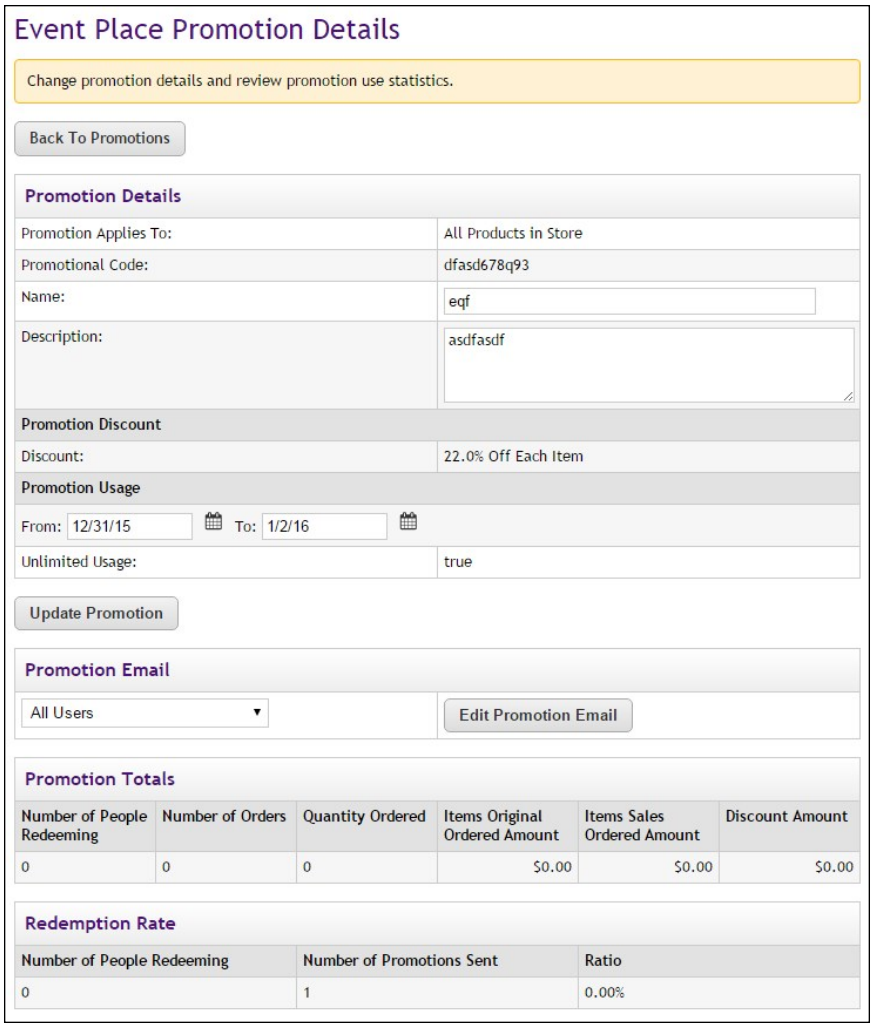
Always include the promotional code and your store name in the e-mail message. The buyer must enter the promotional code during checkout. Your e-mail message should include all information the buyer will need in order to find promoted products and to use the promotion.

Reviewing Promotion Details

To review the details of a promotion, including the totals for the number of times the promotion was used and the total order amount, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Promotions. When the Promotions page appears, review the promotions listed on the page and select the Code for the promotion that you would

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like to review. The Code number is a link. The Promotion Details page then appears.



The Promotion Details page include statistics on the use of the promotion.

In the Promotion Details section, selected/entered values for the promotion are displayed. Some of these values can be modified, such as the Name, Description, and the date range.

In addition, the Promotion Details page keeps running totals for the "Number of People Redeeming," the total "Discount Amount," and other values.

Archiving a Promotion

If you are done with a promotion and do not want to use it again, you can archive the promotion. When you archive a promotion, you will not be able to edit the promotion, but you will be able to view the Promotion Totals. To archive a promotion, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Promotions. When the

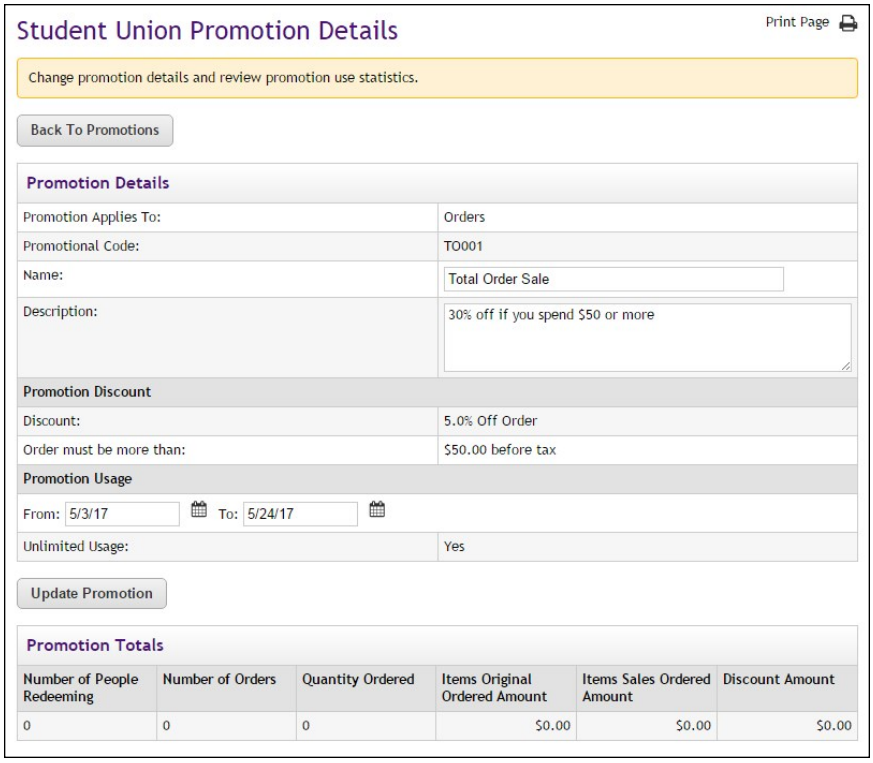
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Promotions page appears, review the promotions listed on the page and select the Archive link for the promotion that you would like to archive. After the promotion has been archived, it will appear in the Archived Promotions sections of the Promotions page.

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



3. Make your changes and click the Update Promotion button.

Archiving a Promotion

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

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

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

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1. 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 in the Code column to see its statistics displayed on the Promotion Details screen.

   The following information is available:

   - Number of people redeeming
   - Number of orders
   - Quantity ordered
   - Items original ordered amount
   - Items sales ordered amount
   - Discount amount

4.18 User Modifiers (Buyer Info)

A "user modifier" is a custom field that can be added to the checkout process whenever a product for that store has been placed in a customer's shopping cart. For shoppers, user modifiers appear as fields/questions near the conclusion of the checkout process. User modifiers do not add cost to the purchase or change products in any way. These fields are strictly for informational purposes and are used for capturing additional information about customers.

User modifiers selected by your customers can be viewed in the Product Detail Report and the Buyer Information Report.

Note: In Marketplace reports, user modifiers are known as "buyer modifiers."

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Some schools use user modifiers to capture demographic information on their shoppers. These fields can be required or optional. When you use these fields, you will need to strike a balance between your desire for information about your customers and their desire to simply complete the checkout process.

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:

- **Drop-Down Selection**—The shopper is asked to make a selection from a dropdown list. For example, the shopper may be 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.
- **Multiple Select Checkboxes**—The shopper is asked to choose from multiple checkbox options that may apply to themselves or their purchases. 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:

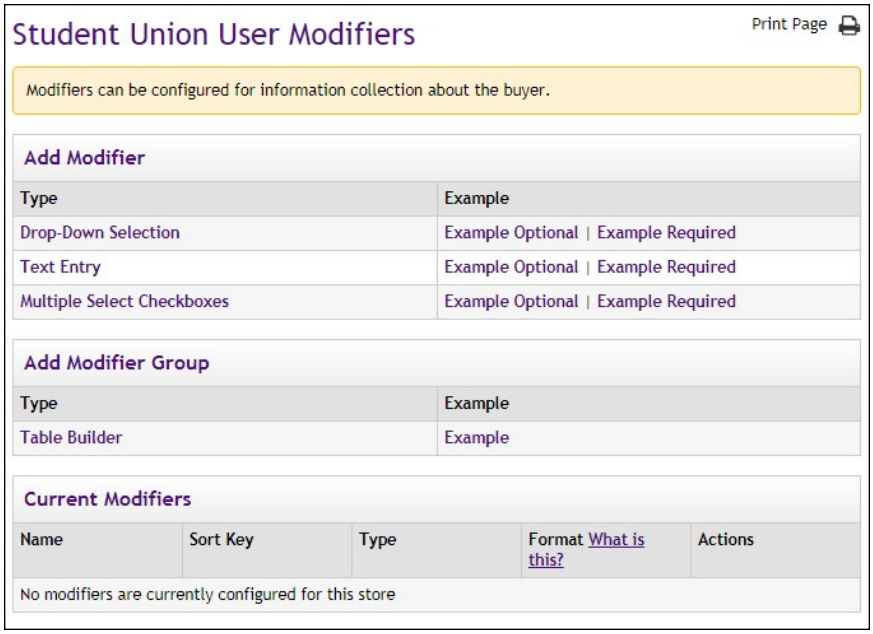
- **Table Builder**—The Table Builder organizes modifiers in a table format, making it more convenient for customers to enter information for multiple modifiers during the uStores checkout process. Each column of the table represents a user modifier that is set up and controlled independently from the table.

Adding a User Modifier

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

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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.

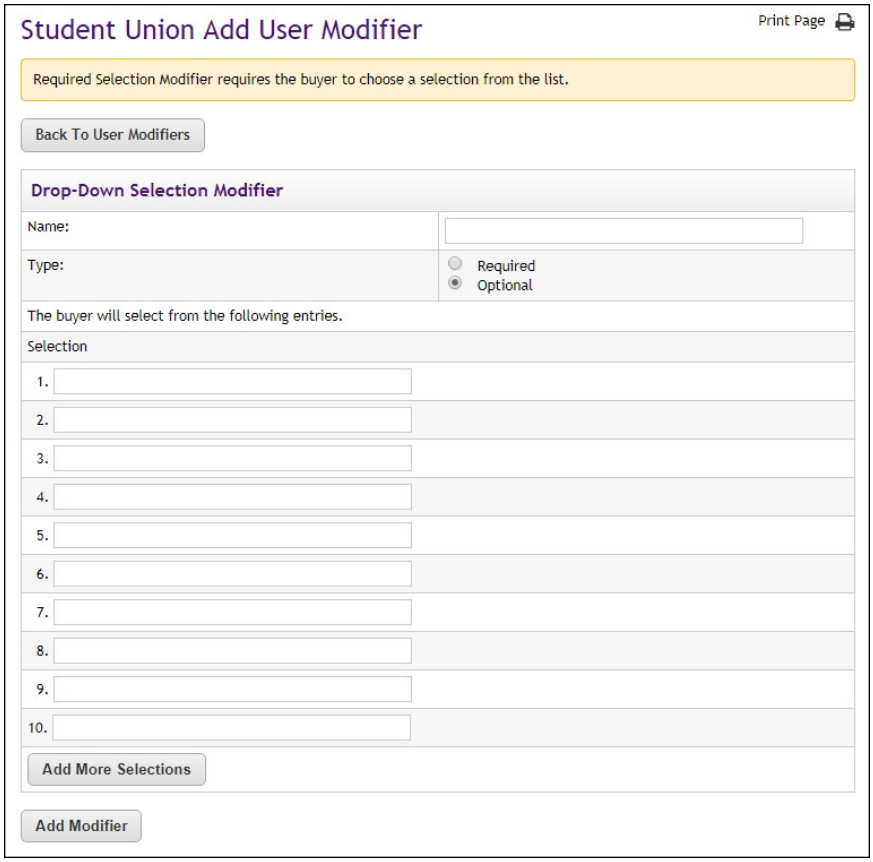
3 Enter the modifier information and then click the Add Modifier button. (See "Using the Add/Edit User Modifier Pages" below for details on completing the page.)

Using the Add/Edit User Modifier Pages

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.

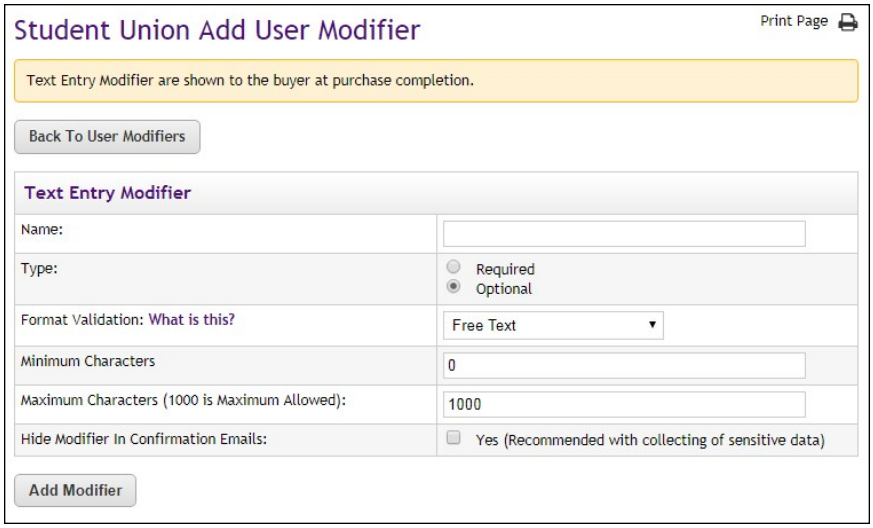
- **Drop-Down Selection**—You must enter a name for the modifier and its selection values. In addition, you must choose whether a customer response is optional or required. For example, you might create a modifier with the name of "customer type," the selections might be student, alumni, parent, staff, and other, and the customer might be required to make a selection.

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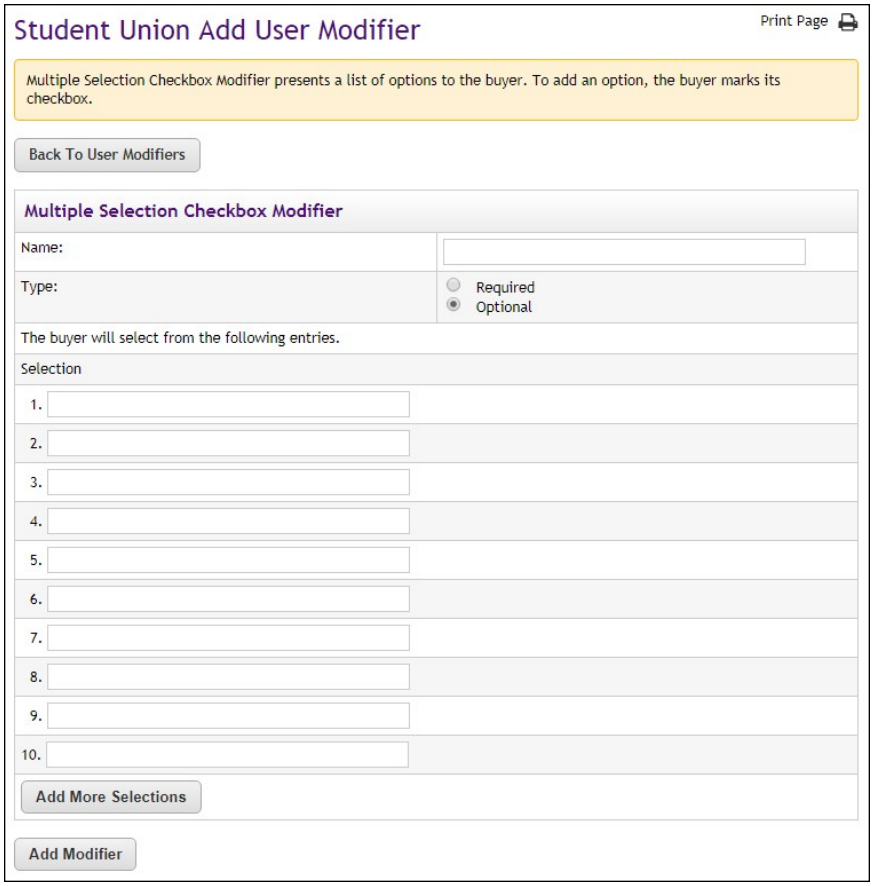
- **Text Entry Modifier**—You must enter a name for the modifier and select whether the modifier should be a required or optional field. The "Format Validation" field allows you to specify the format of the entry (numeric, alphabetic, e-mail, date, phone number, etc.) so that validation can take place on the customer's entry and undesired characters can be eliminated. For example, by chosing, "numeric" you can eliminate alphabetic characters from being entered. Or by chosing "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.)

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- **Multiple Selection Checkboxes**—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. Plus, you can determine whether the modifier should be a required or optional field.

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Validation Formats for Text Entries

The following table defines the validation formats that are available for text entries.

Validation Format	Definition/Characters Alowed
Numeric	0123456789
Numeric Extended	0123456789-()., [space]
Alpha	abcdedfghijklmnpqrstuvwxyz ABCDEFGHIJKLMNOPQRSTUVWXYZ
Alpha Extended	abcdedfghijklmnpqrstuvwxyz ABCDEFGHIJKLMNOPQRSTUVWXYZ -().,& [space] ' [single quote]

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Validation Format	Definition/Characters Alowed
Alphanumeric	abcdedfghijklmnpqrstuvwxyz ABCDEFGHIJKLMNOPQRSTUVWXYZ 0123456789
Alphanumeric Extended	abcdedfghijklmnpqrstuvwxyz 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.

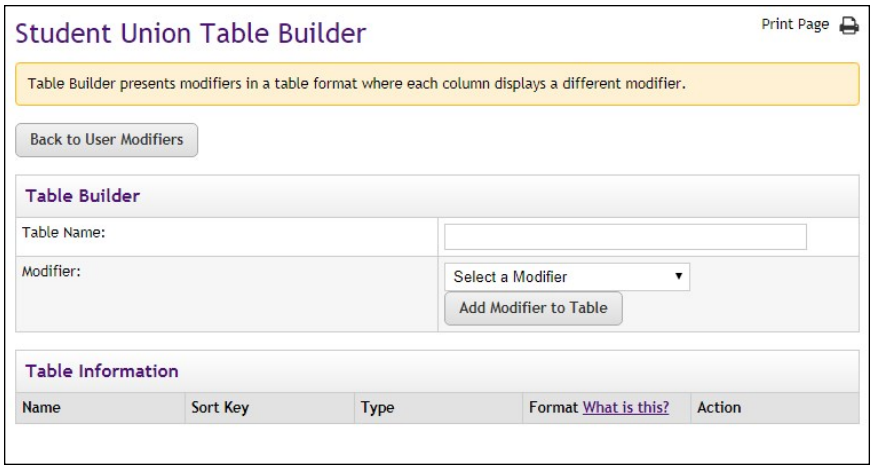
Using the Table Builder

Follow these steps to add a table builder modifier group. Only merchant managers and store managers can edit user 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 are part of the table builder will be grouped into a sub-table.

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2 Select the Table Builder text link in the Add Modifier Group section. The Table Builder page appears.



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 Modifer to Table button.

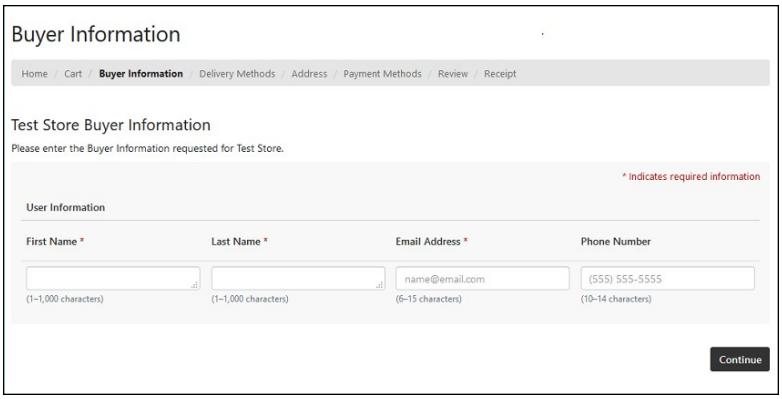
All modifiers that you have created are included in the Modifier dropdown list. The Table Builder allows you to organize *existing* modifiers into a tablular format. So be sure you have already created *all* the modifiers that you would like to appear in the table *before* you create the table.

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.



Here is an example of a table that includes three modifiers.

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Editing a User Modifier

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

4.19 Taxes

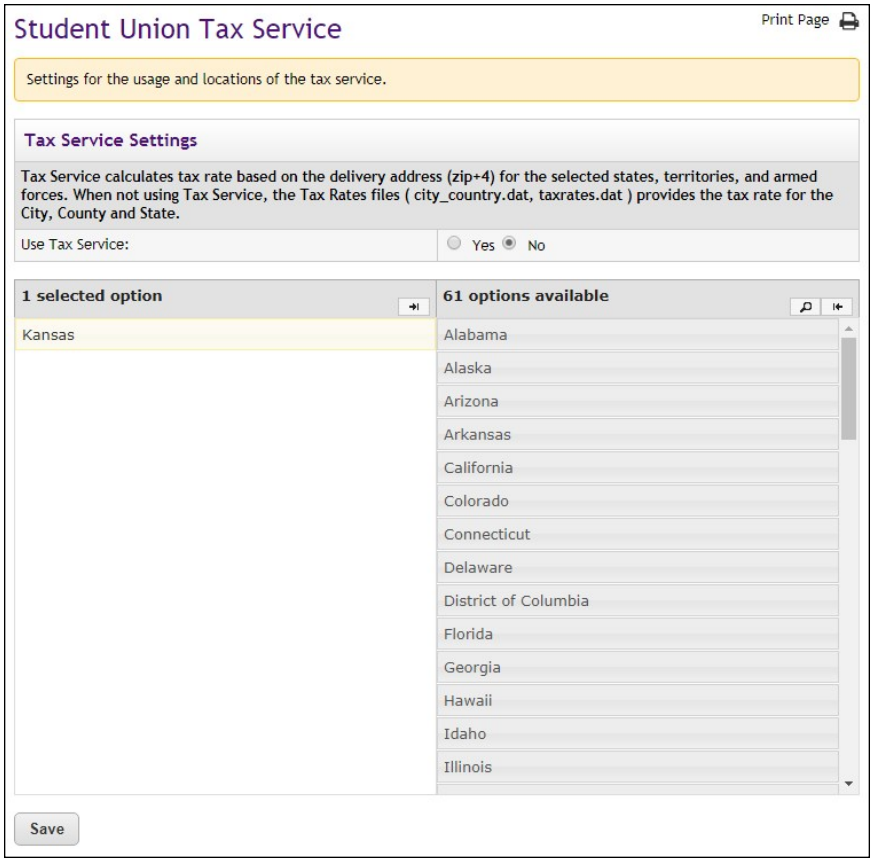
Marketplace provides the option of using a tax service that provides up-to-date tax rate tables for all municipalities in the United States, including territories and the armed forces. This information is updated on a monthly basis.

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 for maintaining the tax rate files for all states, counties, and cities where taxes should be withheld.

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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.



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 Select which states will use the tax service. Taxes will be applied to uStores orders in which the customer's shipping address is located in one of the states selected on this page. The tax service determines the applicable taxes. (If the customer's shipping address is NOT located in the one of the states selected on this page, then no taxes are applied.)

Note: If the order does not use shipping (for example, the customer will pick up their order), then the Default Delivery Location established with the shipping class for this product will be used to determine the applicable taxes.

4 Click the Save button.

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About the Tax Methods

Marketplace offers two methods for computing taxes. 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
Custom Tax Rates: The campus maintains the data that specifies the tax rates.	• 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.	• 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. • Not available for Marketplace Point-of-Sale
TouchNet Tax Service: Marketplace utilizes a tax service that maintains the tax rate files.	• 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 than possible with Custom Tax Rates. • Available for Marketplace Point-of-Sale	• 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 with the TouchNet tax service. It is only available for stores that use Customer Tax Rates.

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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 a 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.

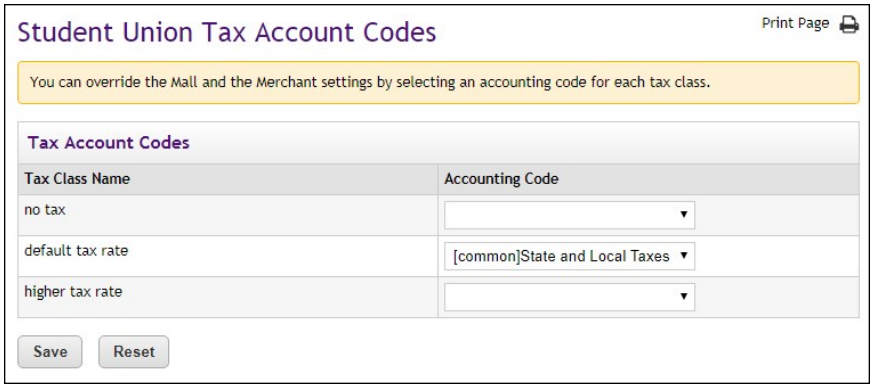
4.20 Assigning Tax Account Codes

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 120**. 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.



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

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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.

4.21 Address Validation and ZIP+4

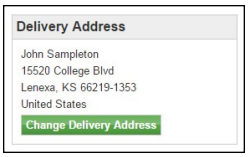
When a shopper buys a product and shipping is required, the shopper will encounter a Delivery Address page during the uStores checkout process. After the customer enters a delivery address, the address validation system then determines if it recognizes the address.

Note: The address validation process takes place regardless of whether or not the store is using the tax service. (For more information about the tax service, see **"Taxes" on page 265**.)

The following situations may result when address validation takes place:

The entered address is an exact match ...

If the entered address is an exact match with the data in the address validation system, uStores continues to the Payment Method page and displays the delivery address in the right column.



The ZIP+4 is automatically added to most addresses.

If the customer did not enter a ZIP+4—but the entered address is otherwise an exact match—the ZIP+4 is automatically added. The customer need take no action.

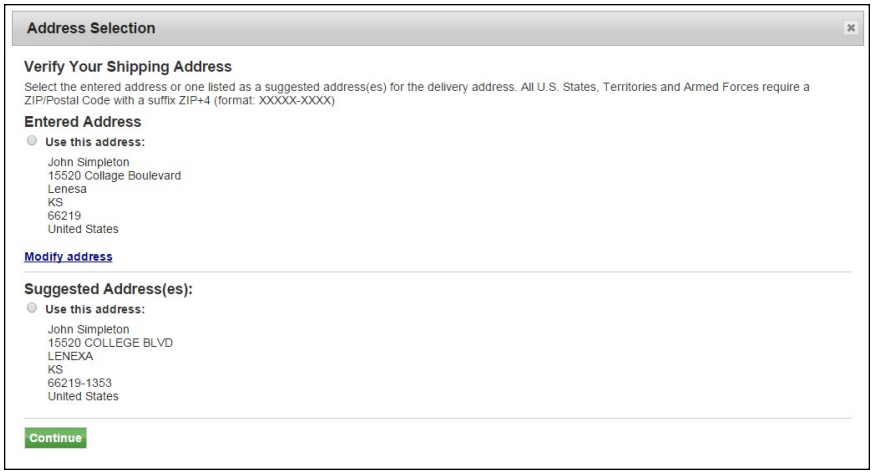
Note: If the customer entered a ZIP+4 but the address validation system finds a different ZIP+4, the address validation system will use the ZIP+4 that it finds in its records.

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The entered address requires standardization ...

In some cases, the address validation system may offer a standardized version of the address entered by the customer. For example, the address validation system uses the USPS standardized format for addresses, which does not include periods after abbreviations. So if the customer entered "Blvd." for Boulevard (or even if they entered the complete word "Boulevard"), the address validation system will offer a standardized address that uses "BLVD" (no period and all caps).

If address validation offers a standardized address, the customer's original entry is then displayed alongside the standardized address—with the standardized address labeled as the "Suggested Address." (The ZIP+4 is included in the Suggested Address.)

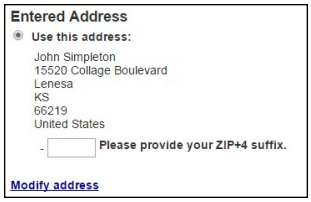


The Address Selection panel suggests a standardized address.

When the Address Selection panel appears, the customer can choose which address to use.

Note: Notice in the example above, the customer misspelled both the street name ("Collage" instead of "College") and the city name ("Lenesa" instead of "Lenexa"). The address validation system was nonetheless able to determine an address match and provide a "Suggested Address."

If the shopper chooses to use the "Entered Address," Marketplace will assume the shopper knows the complete address and will prompt the customer to enter the ZIP+4.

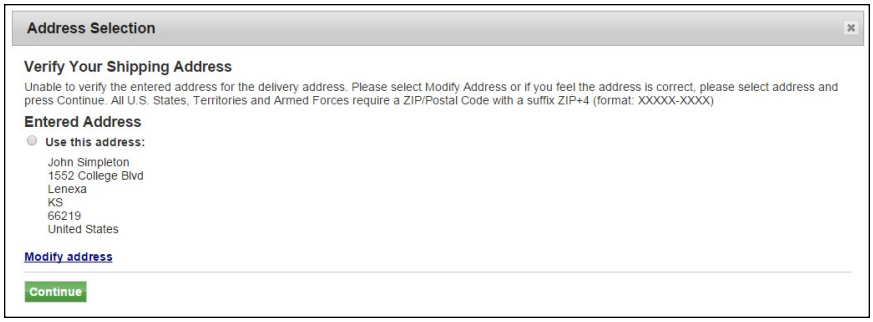


A ZIP+4 is always required.

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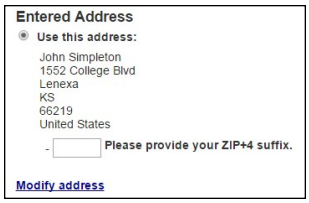
The entered address does not match a known address in the address validation system ...

If the entered address does not match a known address in the address validation system, the address validation system is not able to provide a suggested address. The customer can choose to use their entry or to modify the address.



If the customer enters an address that does not match data in the address validation system, the system may not be able to suggest an address.

At this point, some customers may notice that they entered the shipping address incorrectly. If that is the case, they can choose the "Modify address" link to return to the Delivery Address page and correct their entry. Or if the customer selects the "Use this address" button, the address validation system will prompt the customer to enter a ZIP+4.



Customers can choose the Modify address link if they entered a mistake.

In all cases a ZIP+4 must be used, whether it's the recommended ZIP+4 provided by the address validation system or a ZIP+4 value entered by the customer.

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4.22 Linking to a Store

If some circumstances, you may choose to provide your customers with a direct link to one of your stores. For example, the link might be used in an e-mail message or on a campus portal web page.

The easiest way to determine the URL for a store is to navigate to that store through the Marketplace mall after enabling the store. You can then copy the URL that appears in the address field of your browser.

However, in the following circumstances, you won't be able to visit the store by navigating from the Marketplace mall: 1) the store has not yet been enabled or 2) the store is in single-store mode AND the "Store is Viewable in Mall" option is set to "No". In both of these situations, you must understand the format of the store URL.

Store URL Format

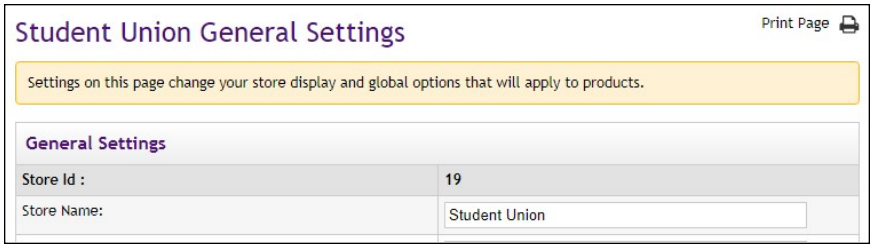
Marketplace stores use the following format for URLs:

> https://[subdomain.domain name.top-level domain]/[customer number]_ustores/web/store_main.jsp?STOREID=[ID#][&SINGLESTORE=true]

[subdomain.domain name.top-level domain] is typically secure.touchnet.com or secure.touchnet.net or another value determined by your school. This value is consistent for all your stores.

[customer number] is unique for each school. This value is determined by TouchNet, and it's consistent for all your stores.

[ID#] is the Store ID given by the Marketplace Operations Center when the store was established. This value is available in the Marketplace Operation Center on the store's General Settings page.



The Store ID is displayed on the [Store] General Settings page.

[&SINGLESTORE=true] is necessary if you have turned on single-store mode for your store and you want customers to see your store displayed with single-store mode customizations.

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Note: Both STOREID and SINGLESTORE must be in uppercase. These parameter names are case sensitive.

An Example of Linking to a Store

For this example, we will use the following values: [subdomain.domain name.top-level domain] is "secure.touchnet.com," [customer number] is "C10000," and [ID#] is 19. In addition, we will assume that single-store mode has been turned on.

The store URL would look like this:

> https://secure.touchnet.com/C10000_ustores/web/store_main.jsp?STOREID=19&SINGLESTORE=true

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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 275**).
- Or, you can build a product import file to add multiple products at the same time (See **"Importing Product Lists" on page 291**).

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."

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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.

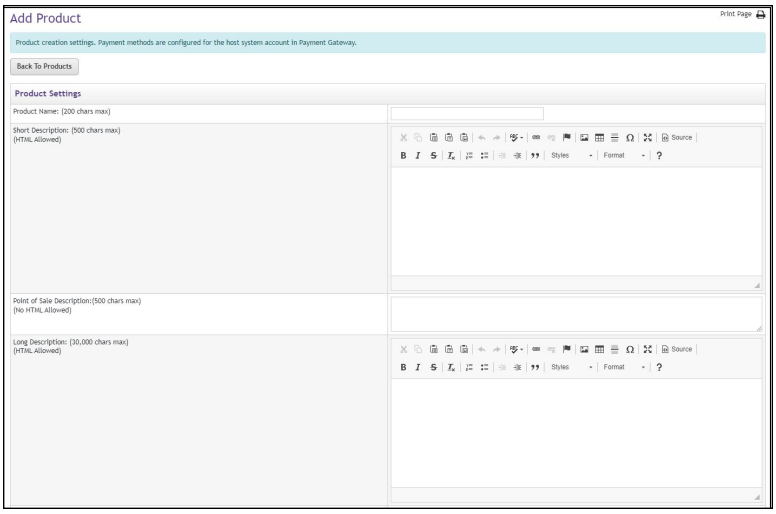
Important! If an optional product feature doesn't result in a different inventory item, use a product "modifier" instead. See **"Products With Modifiers" on page 291** for more details.

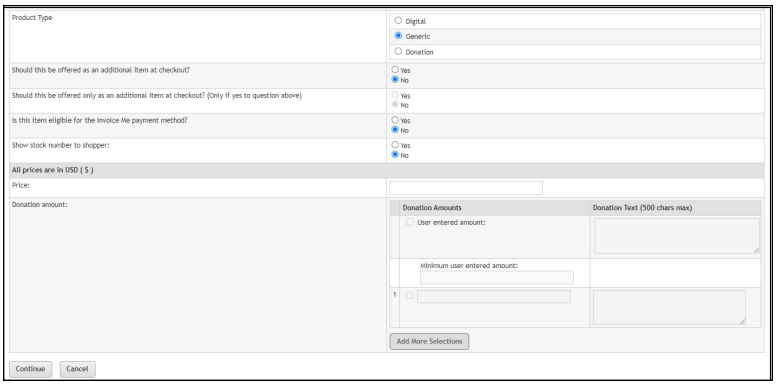
Adding a Product

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 236**.

1. From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products. The Store Products page appears.
2. Click the Add button. The first page of the Add Product process appears.

Add Product: Product Settings





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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.

  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.
- **Point of Sale Description** -- Shoppers see this description associated with the default image of the product. . This field accepts a maximum of 500 characters. This field does not accept HTML.
- **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*.

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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.

- **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 288** for more information.
- **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.
- **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 288** 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.

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- **Is this item eligible for the Invoice Me payment method?** – You can choose if the item can be purchased using Invoice Me.
- **Show stock number to shopper:**
  Select "Yes" if you want to allow the stock number to appear to the users. The default setting is "Yes".

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.

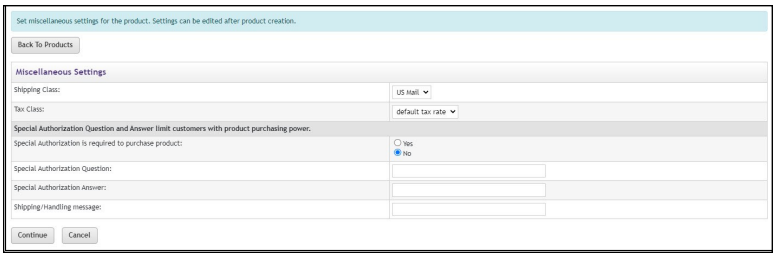
- **User entered amount**—Select this checkbox to display a field to the donor in which they can enter a specific donation amount.
- **Minimum user amount**—The default minimum user amount is $0.01. This is the amount that will be used if you make no entry in this field. However, you can enter a value of $0 or greater in this field. (Yes, donations products can be configured with a minimum donation amount of $0.)
- **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 below 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. If a "User entered amount" field is also used, the word "Other" (by default) will appear in uStores above the "User entered amount" field. (See the Donation Text field below for information about how to modify the display text for the "User entered amount" field.)
- **Donation Text**—You can add label text to each donation amount. For example, if each donation amount represents a particular contribution level, you can add a contribution level description to each pre-set donation amount by making entries in the Donation Text column for each corresponding donation amount. For example, you might set up the donation levels of Friend ($30), Partner ($50), and Champion ($100), as shown in the above screen shot. The Donation Text field can contain a maximum of 500 characters. By entering a value in the Donation Text column for the "User entered amount," you can override the default "Other" field label that appears in uStores. For example, you might enter "Or enter a different donation amount:" to appear in place of "Other."

  Note: For examples of how these fields appear in uStores, see **"Editing Donation Settings" on page 323**.

6 Click the Continue button. The Miscellaneous Settings page appears.

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Add Product: Miscellaneous Settings



1 Complete the following fields.

- **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 288** for more information about setting up a shipping class appropriate for donations. For more information about shipping classes, see **"Shipping Classes" on page 236**.
- **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 a 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 55**.

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

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system: "Setup for Banner by Ellucian" on page 611, "Setup for Colleague by Ellucian" on page 647, "Setup for PeopleSoft" on page 669, or "Setup for Workday" on page 695.

- **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 "User Groups and User Authentication" on page 110.

- **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



Available Features

The features are:

- You can add up to 10 images to a product or package.
- To reorder the display of images, you can drag and drop the desired image to the desired position.
- The first image will be considered the primary image and used for Marketplace Point-of-Sale, the store home page, mall and store category pages, additional items pages and related items tiles.
- When cloning product all images will be copied to the new product.

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- A new zoom feature allows a user to zoom in and out on a product image.
- Product image sizes will now be validated when they are uploaded, ensuring they do not exceed the new size limit of 500K.

Product Image Zoom Feature Guidelines

To engage the zoom features, keep these guidelines in mind.

- To use the zoom feature on a product image, TouchNet recommends that you size your images at 500 x 500 pixels.
- The recommended image width and height is 800 x 800 pixels.
- When a new image is uploaded that is greater than 400 x 400 pixels, the zoom feature will automatically be engaged in uStores web.
- Default product images (tag icon) will not be zoom-able.
- Zoom is available on the product details page only, no on the store home or category pages.
- Zoom is not available in Marketplace Point-of-Sale.
- Zoom for mobile devices will be completed by increasing/decreasing the screen size.

Important! Existing images do not need to be updated. Images at 400 x 400 pixels or less will still be displayed in uStores correctly, but the zoom feature will not be available for those images.

Adding a Product Image

Follow these steps to add a product image.

1. Click the Add Product Image button to launch the upload dialog window, which allows you to browse for images on the hard driveand/or 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 500 pixels wide by 500 pixels high.
   - All images must have file sizes of 500K or less.
   - You can upload up to 10 images for a product.
   - To reorder the display of images, you can drag and drop the desired image to the desired position.

   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

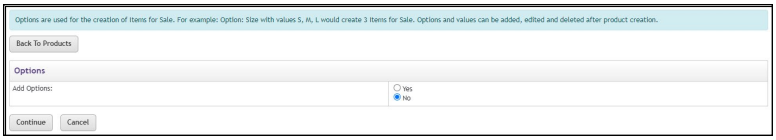
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within the same store, the original image will be overwritten. So remember to always use unique names for images.

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



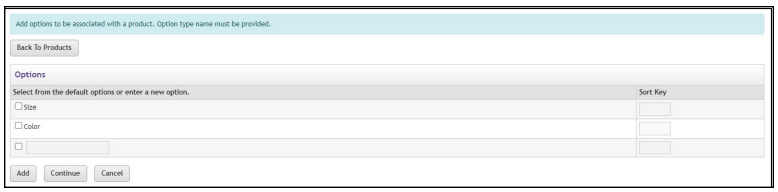
An "option" is a factor such as size or color that the shopper must choose before adding the product to their shopping cart. For instance, you might offer a shirt in three colors and four sizes (e.g., white, blue, and gray; and small, medium, large, and extra large). In Marketplace, you can create this 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.



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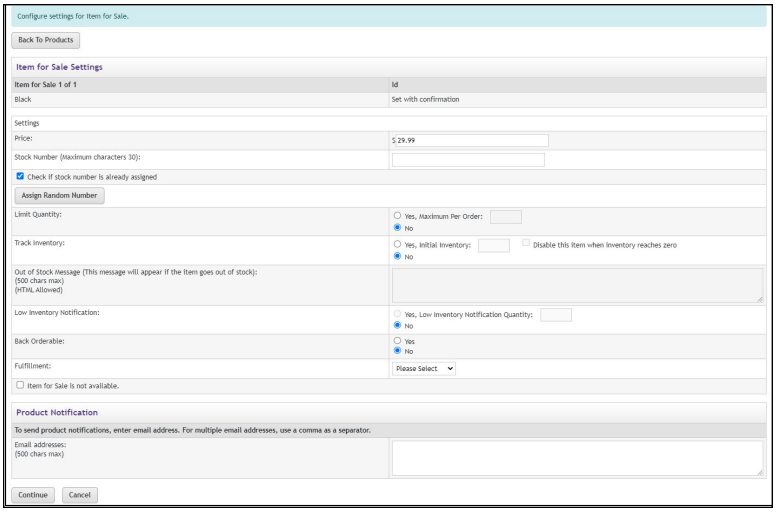
For generic products, both "size" and "color" can be selected (while for digital products, "File Size" and "File Format" are available); however, you can also name additional option types (such as height, weight, volume, sleeve length, etc.) by using the additional field(s). After you've selected the option types (or entered new types), click the Continue button.



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 Add 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



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.

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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.
- **Ststock 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) Mark Yes to track the product's inventory. If you select Yes, enter the initial inventory quantity.

  You can also select the "Disable this product when inventory reaches zero" checkbox. If you select this checkbox and the inventory reaches zero, customers will not be able to see the product. If instead you would like the product to remain enabled in this situation, do not select the "Disable this product when inventory reaches zero" checkbox and consider your selection for the Back Orderable field.
- **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.

  Note: The Out of Stock Message will also appear when the Detailed Product Category layout is used.

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- **Low Inventory Notification**—Select Yes if you would like a low inventory notification e-mail message to be sent when the product inventory hits the threshold value that you enter in the Quantity field. Another low inventory message will be sent when the inventory reaches zero. Low inventory notifications are sent to the e-mail addresses entered in the Low Inventory Product Notification field on the Store General Settings page.
- **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.
- **Fulfillment**—This is a required field. You must make a selection from the dropdown list. Two options are available:
  - **Auto-Fulfill**— Choose Auto-Fulfill 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).
  - **Manually Fulfill**—Choose Manually Fulfill for any product in which a physical product must be shipped to the customer. This option may also be used when a product such as an event registration includes a component that must be mailed to the customer in advance of the event.

  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 overriden for ACH purchases and manual fulfillment is required.

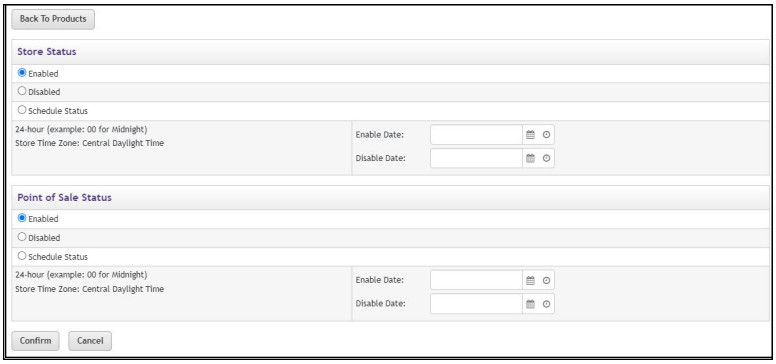
  Note: (For donations only) In order for the recurring payments option to be available, the Auto Fulfill option must be set to Yes. In addition, the recurring payments options must also be selected in the store's general settings.

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- **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.
- **Email Addresses**—Enter the e-mail addresses of everyone who should be notified when this product sells. Enter a comma between e-mail addresses. This field will hold a maximum of 500 characters.

2 Click the Continue button when you are finished. The enable/disable options appears.

Add Product: Status



1 Choose from the enable options:

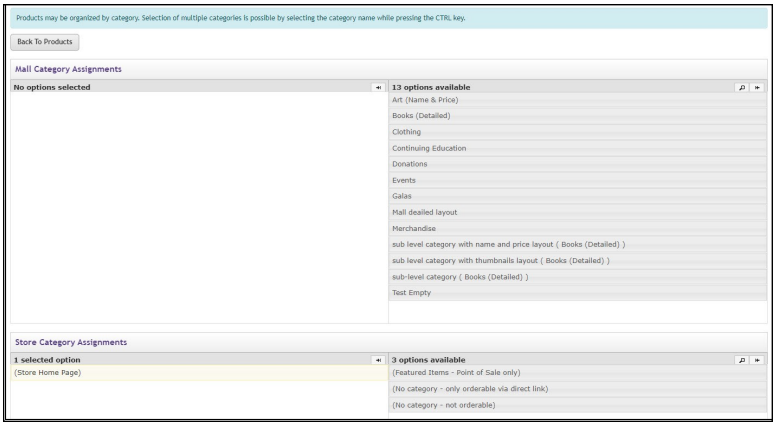
- **Enabled**—If you choose this option, the product will be immediately available to buyers once you click the Confirm button.
- **Disabled**—If you choose this option the product will not be available to shoppers until you enable it. You can use this option if you plan to add modifiers to a product, as described in **"Products With Modifiers" on page 291** 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.

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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 152**.

2 Click the Confirm button. Your product has been successfully added to your store! The Category page next appears.

Add Product: Categories



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 45**) and store categories (for more information, see **"Store Product Categories" on page 241**). 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.

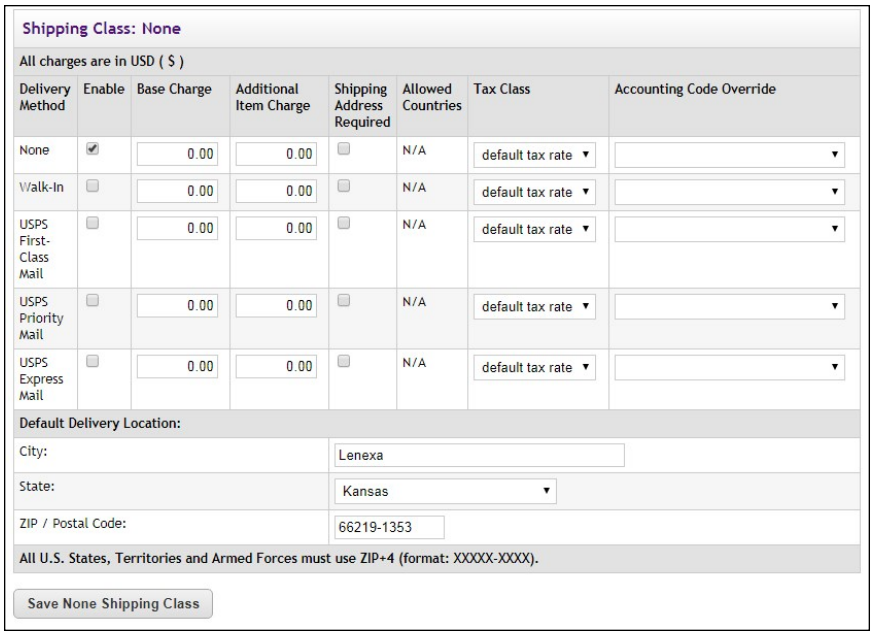
2 Review the shipping classes displayed on this screen to determine if a shipping class appropriate for donations has already been created. In a shipping class appropriate for donations, the Enabled checkbox will

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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" or "None" in the Enter New Shipping Class Name field and click OK. The Shipping Classes screen is refreshed with the new shipping class added.



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 236** and **"Delivery Methods" on page 52**.

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:

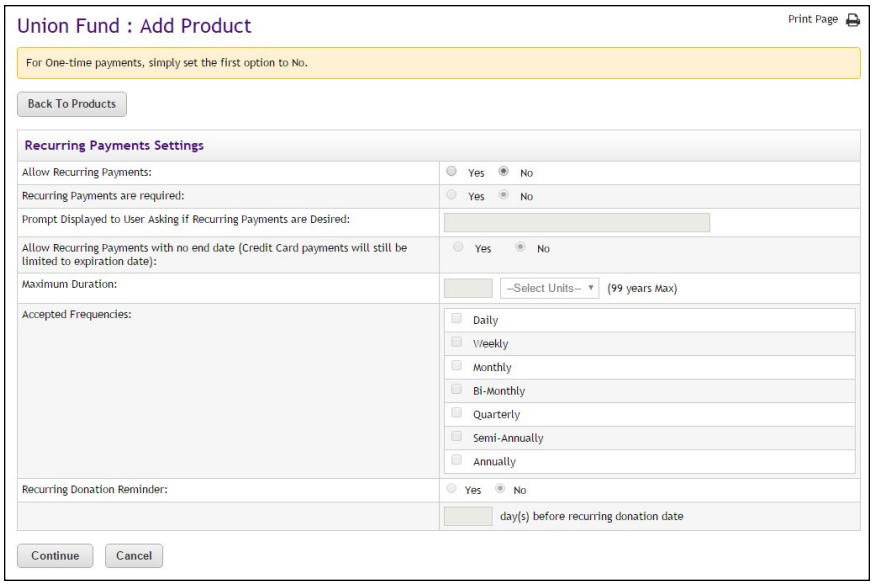
1 The Allow Recurring Payments on Donation Product Types option has been turned on in the store's general settings.

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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 276**.)



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.
- **Allow Recurring Payments with no end date**—If you select Yes for this setting, customers will not be prompted for an end date when setting up recurring payments. The applicable end date will be the Maximum Duration or (if the customer is using a payment card) the payment card's expiration date.
- **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

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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.
- **Recurring Donation Reminder**—Your customers may appreciate receiving a recurring donation reminder message before each recurring payment is processed. To turn on recurring payment reminders, select Yes for Recurring Donation Reminder. Once you select Yes, you must also enter a number in the "day(s) before recurring donation date" field.

  Note: The announcement message that appears in these recurring donation reminder messages can be configured on the Email Addresses page, as described in **"uStores E-mail Addresses" on page 473**. Make sure you have considered what this announcement will say before you select Yes for the Recurring Donation Reminder field.

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 355**.

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

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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.
- **Don't include any returns (new lines) in CSV fields.** Returns signal the end of a record (which will be interpreted as the end of a product record). Be sure to remember this if you enter HTML in the SHORT_DESC field or the LONG_DESC field: any HTML that you enter in these fields must be defined as a single line of code.
- **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,

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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 293**).
2. To the row, add any optional column headings you want to use (see **"Optional Column Headings" on page 294**).
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.

These column headers can be listed in any order.

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.

Note: Both the SHORT_DESC field and the LONG_DESC field accept HTML. However, don't include any returns (new lines) in CSV fields. Returns signal the end of a record (which will be interpreted as the end of a product record). Be sure to remember this if you enter HTML in the

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SHORT_DESC field or the LONG_DESC field: any HTML that you enter in these fields must be defined as a single line of code.

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.)

Note: For schools that have licensed Mobile Marketplace, a MOBILE_DESC field (a product description that overrides LONG_DESC) can also be used. And for schools that have licensed Marketplace Point-of-Sale, a POINT_OF_SALE_DESC field (a product description that overrides LONG_DESC) can also be used.

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.

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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.

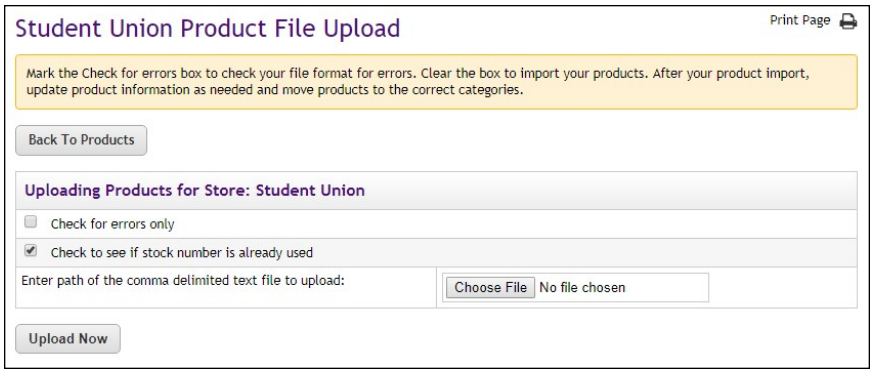
Importing a CSV File

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.

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2 Choose the "Import Product" 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.

5.3 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

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Category Assignments page. These additional pages will be described in subsequent sections of this guide.

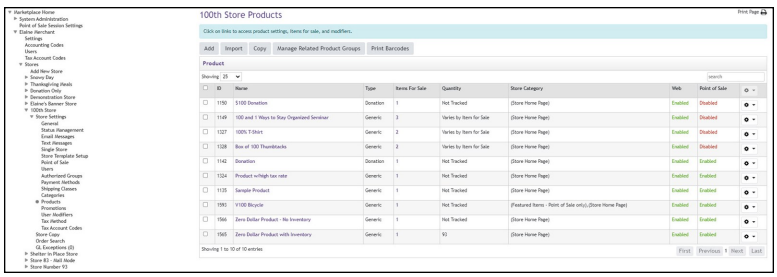
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Using the Products Page

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.



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The buttons at the top of the page provide the following functionality:

- **Add** —Select the Add button to launch the Add Product process. The process of adding a product is described in **"Adding a Single Product Using the Wizard" on page 275**.
- **Import** —Select the Import 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 291**.
- **Copy**—Select the Copy button to duplicate products.
- **Manage Related Product Groups**—Select the Manage Related Product Groups button to manage related item groups that have already been created. Management of related items is described in **"Managing Related Products" on page 325**. (The process for creating related item groups is described in **"Creating Related Product Groups" on page 303**.)
- **Print Barcodes**—Select the Print Barcodes button to print the relevant barcode(s) for the selected product(s).

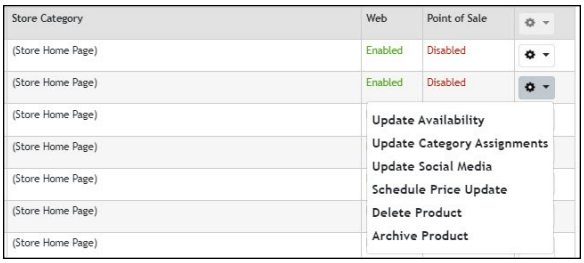
Additional functionality is available within the Products table, as described in the following sections.

Note: Several recent updates to the Products page include:

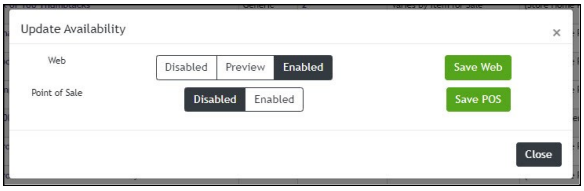
- Product ID has been added to the table for easy access.
- Gearwheel actions have been simplified to reduce the number of page reloads.
    - Actions from the header gearwheel are: Update Availability, Update Category Assignments, Update Social Media, Schedule Price Update, Create Package, Delete Products and Archive Products
- Actions from the product gearwheel are: Update Availability, Update Category Assignments, Update Social Media, Schedule Price Update, Delete Product and Archive Product
- The Update Availability option displays as follows:
- The Update Category Assignment option appears as follows. Select the Mall or Store categories when updating.
- Actions from the product gearwheel are: Update Availability, Update Category Assignments, Schedule Price Update*, Update Social Media, Delete Product and Archive Product

  **The Schedule Price Update option is not available for Donations and Package Types.*

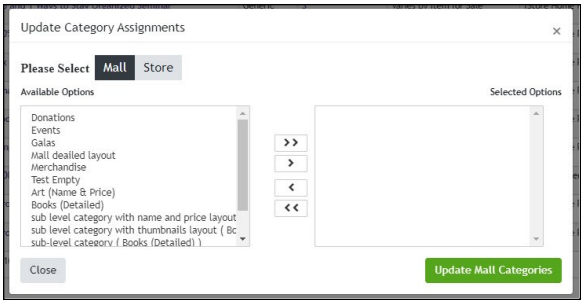
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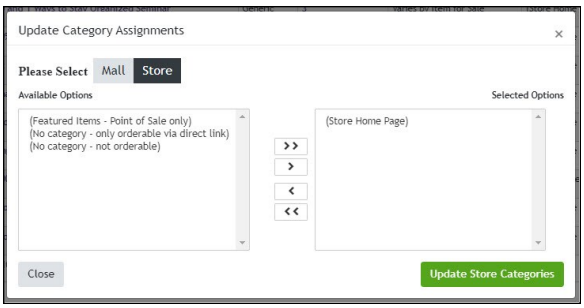


The Update Availability option displays as follows:



The Update Category Assignment option appears as follows. Select the Mall or Store categories when updating.





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 306**.

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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, select the Gear icon (in the far right column) of the corresponding product. The Gear flyout menu will appear. Choose Update Category Assignments. The Update Category Assignments modal will appear. You can use the Update Category Assignments modal to add and remove category assignments for the active product. To move a specific category, select it from the list and click the > icon to add it or the < icon to remove it. If you want to add all categories, select the >> icon. To remove all categories, select the << icon. For more information about the Update Category Assignments modal, see **"Managing Category Assignments" on page 337**.

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 select the Gear icon in the heading of the far right column and choose Update Category Assignments. Update the categories just like you would for a single product.

Editing Product Availability

The availability of each product is displayed in the Web column and Point of Sale column. The Web field will say Enabled (the product is available for shoppers), Preview (the product is in preview mode and is NOT available for shoppers), or Disabled (the product is NOT available for shoppers). The Point of Sale field will say Disabled (the product is NOT available for shoppers) or Enabled (the product is 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.

From the flyout menu, select Update Availability and then choose Disabled, Preview, or Enabled for the Web field and Disabled or Enabled for the Point of Sale field.

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 Disabled, Preview, or Enabled.

For more information about product status/availability, see **"Product Status Management" on page 392**

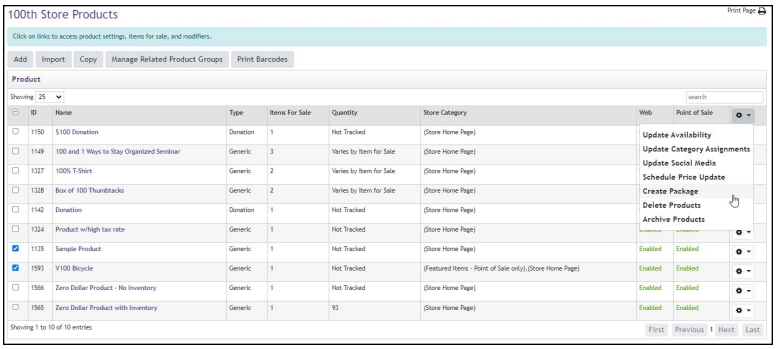
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Creating Packages

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 398**.

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. Select the Update Social Media option.



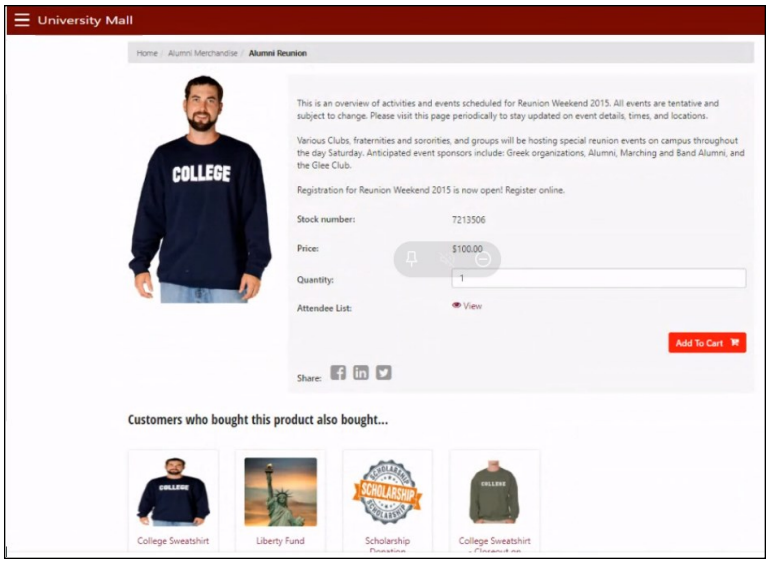
The Update Social Media option display.

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Select Social Media Management from the flyout men. 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.



When related products have been configured, they appear on the Product Details page in uStores.

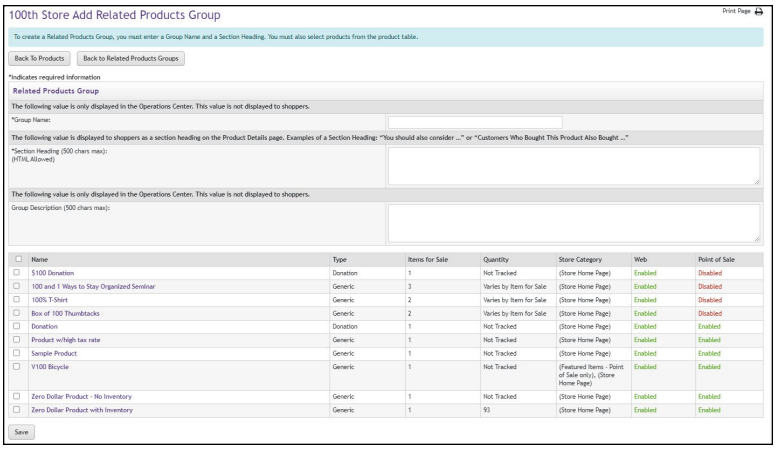
Management for related products begins with the Related Products button near the top of the Products page.

To choose related products, select the Manage Related Product Groups button. The store Related Product Groups page will appear.



Select the Add Related Product Groups button. The store Related Product Groups page will appear.

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On this 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.

Select the checkboxes of the products you wish to relate together.

When you have completed the entire form, select the Save button.

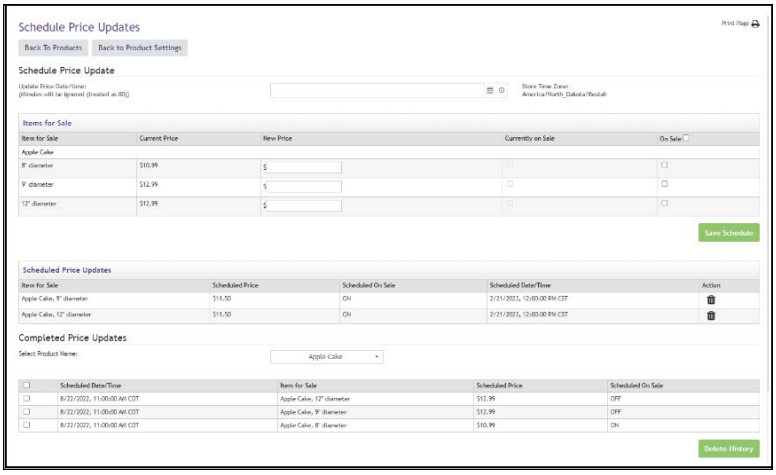
Scheduling Price Updates

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.

When you select Schedule Price Update from the Gear flyout menu, the Schedule Price Update page appears.

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The Schedule Price Update allows you to set a date and hour for the price change.

Click on the Date and Time icons to set the date and time you want to schedule the price update. 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 usual 12-hour time.

Enter the new price for each product/item displayed in the Items for Sale table. You can also select the On Sale checkbox to add "On Sale" indicators that customers will see in uStores. 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.

Deleting One or More Products

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

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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.

5.4 Editing Products

Use the following steps to edit a product:

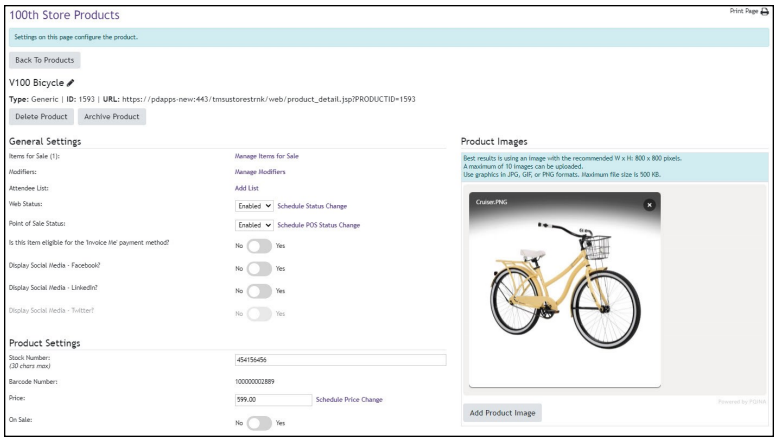
1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products. The [Store Name] Products page appears.



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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.



The top portion of the Product Settings page.

Field descriptions:

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.

You can change the product name by selecting the pencil icon next to the name. The field turns on and you can adjust the name accordingly.

Type

The product type: Generic, Donation, Digital or Package.

ID:

The Product ID.

URL:

The URL that can be used to access the product directly.

Delete Product

This button, when active, will allow the product to be deleted from the product catalog. Once deleted, a product cannot be restored. See section on "Deleting a Product" on page 342 for more information.

Archive Product

This button will allow the product to be archived. See section on "Archiving a uStores Product" on page 341 for more information

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General Settings

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").

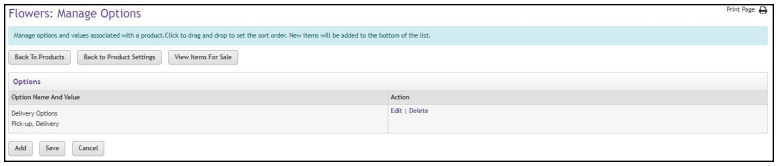
- You can use the Manage Items for Sale link to view the "Items for Sale" and the product settings for stock number, price, inventory, and other settings that apply to a single "Item for Sale.". For more information about editing "Items for Sale," see the "Viewing and Modifying Items for Sale" section of **"Using Product Options" on page 343**.



- The "Manage Items for Sale" link will redirect to the View Items for Sale page. For products that do not have options, the Add Options button appears. This button 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 343**.



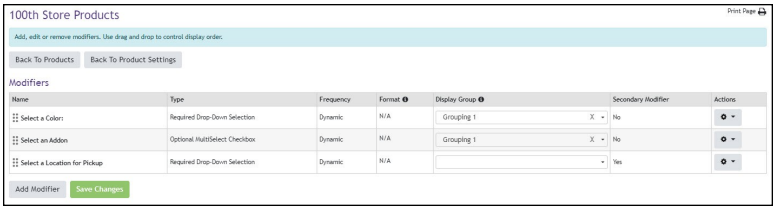
- If product options have been configured, the Manage Options button appears. This button can be used to modify the existing options (and new options). Select the Edit link to open the Edit Option page. For more information about modifying product options, see the "Modifying Product Options" section of **"Using Product Options" on page 343**.



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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. Click the Manage Modifier link to view the existing modifiers for the product.



You can edit a specific modifier by selecting the gear icon on the far right of the product line and selecting Edit. For more information about editing modifiers, see the "Editing a Product Modifier" section of **"Using Product Modifiers" on page 355**.

You can add a new modifier by selecting the Add Modifier button. For more information about adding modifiers, see the "Add a Product Modifier" section of **"Using Product Modifiers" on page 355**.

Attendee List

This field only appears if modifiers have been configured for the product.

The Attendee List functionality allows you to configure an attendee list for display when customers view the Product Details page in uStores. This functionality was specifically created for event products so that prospective registrants can browse the list of registered attendees and possibility make their decision about whether to attend based on the names they recognize on the list. However, the Attendee List functionality can be used for any type of product.

- If modifiers have been configured and an Attendee List has not yet been created, the "Add List" link appears. This link can be used to add modifiers.



- If an attendee list has been configured, the "Manage | Delete List" links appear. The "Manage" link can be used to modify the existing attendee list. The "Delete List" link can be used to delete the list entirely.

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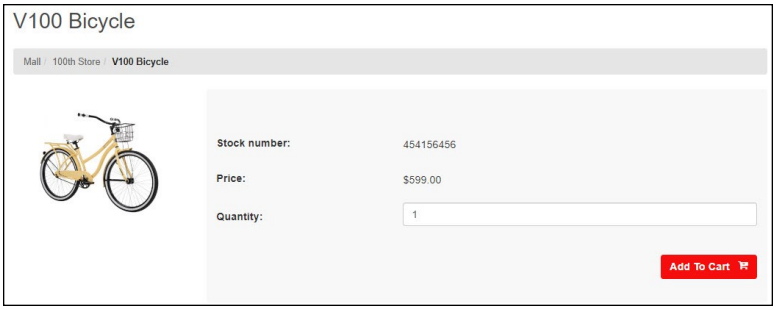


For more information, see **"Creating or Modifying an Attendee List" on page 327**.

Web Status

This field will say DISABLED, ENABLED, or PREVIEW. The status of the product can be changed by updating the dropdown select or selecting the "Schedule Status Change" link. Updating the product status via the dropdown select will immediately change the product status in uStores. For more about managing the status of a product, see **"Product Status Management" on page 392**.

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.

Point of Sale Status

This field will say DISABLED or ENABLED. The status of the product can be changed by updating the dropdown select or by selecting the "Schedule POS Status Change" link. Updating the product status via the dropdown select will immediately change the product status in Point of Sale. For more about managing the status of a product, see **"Product Status Management" on page 392**.

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Is this item eligible for the 'Invoice Me' payment method?
This field toggles between No or Yes.

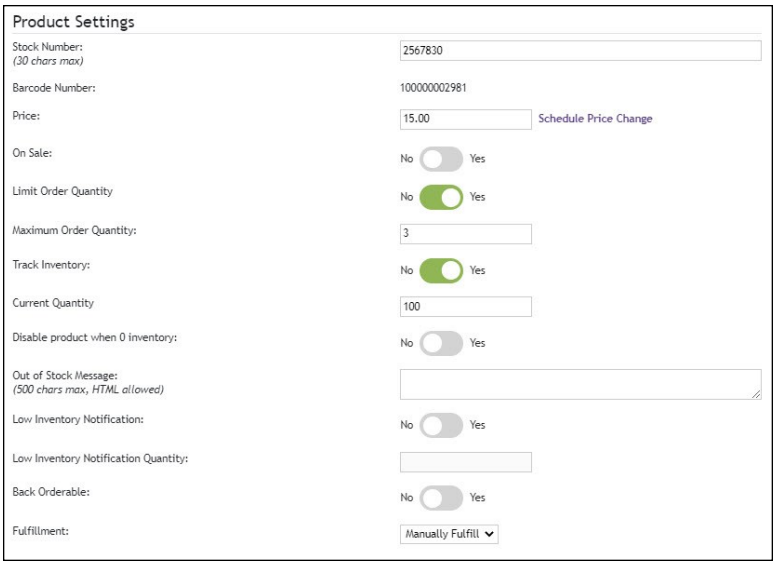
Display Social Media - Facebook?
This field toggles between No or Yes. If this question is grayed out, it has been disabled in the Social Media settings on the Product page.

Display Social Media - LinkedIn?
This field toggles between No or Yes. If this question is grayed out, it has been disabled in the Social Media settings on the Product page.

Display Social Media - Twitter?
This field toggles between No or Yes. If this question is grayed out, it has been disabled in the Social Media settings on the Product page.

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 **"Using Product Options" on page 343**.



Stock Number
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.

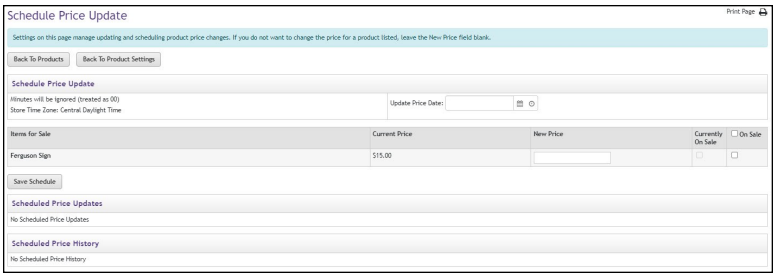
Barcode Number
This is pre-loaded and cannot be changed.

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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," the price field will not appear. Also, see **"Editing Donation Settings" on page 323** 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.



The Schedule Price Update allows you to set a date and hour for the price change.

Click on the Date and Time icons to set the date and time you want to schedule the price update. 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 usual 12-hour time.

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 strikeout) 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.

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.

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Limit Order Quantity?
Mark Yes to limit the quantity of the product that a shopper can purchase. If yes, enter the maximum order quantity.

Maximum Order Quantity?
If you marked Yes to limit the quantity of the product that a shopper can purchase. enter the maximum order quantity here.

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.

Limit Order Quantity
(Digital only) This option can be used to restrict the total amount of copies of a digital file a customer can download.

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.

Time Limit in Days
(Digital only) The maximum number of days (from order date) that a shopper will have to download the file.

Track inventory?
Mark Yes to track the product's inventory. If you select Yes, enter the initial inventory quantity.

Disable product when 0 inventory reaches zero
If you select Yes and the inventory reaches zero, customers will not be able to see the product. If instead you would like the product to remain enabled in this situation, select Noand consider your selection for the Back Orderable field.

Out of Stock Message
If Yes is selected 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.

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Note: The Out of Stock Message will also appear when the Detailed Product Category layout is used.

Low Inventory Notification / Quantity

Select Yes if you would like a low inventory notification e-mail message to be sent when the product inventory hits the threshold value that you enter in the **Low Inventory Notification Quantity** field. Another low inventory message will be sent when the inventory reaches zero. Low inventory notifications are sent to the e-mail addresses entered in the Low Inventory Product Notification field on the Store General Settings page. See **"General Settings" on page 152** for information about entering e-mail addresses for Low Inventory Notifications.

Back Orderable?

Mark Yes if a shopper can order the product even when the quantity available is zero.

Fulfillment

This is a required field. Two options are available:

- **Auto-Fulfill**— Choose Auto-Fulfill 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).
- **Manually Fulfill**—Choose Manually Fulfill for any product in which a physical product must be shipped to the customer. This option may also be used when a product such as an event registration includes a component that must be mailed to the customer in advance of the event.

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.

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Product Notification

Email Addresses

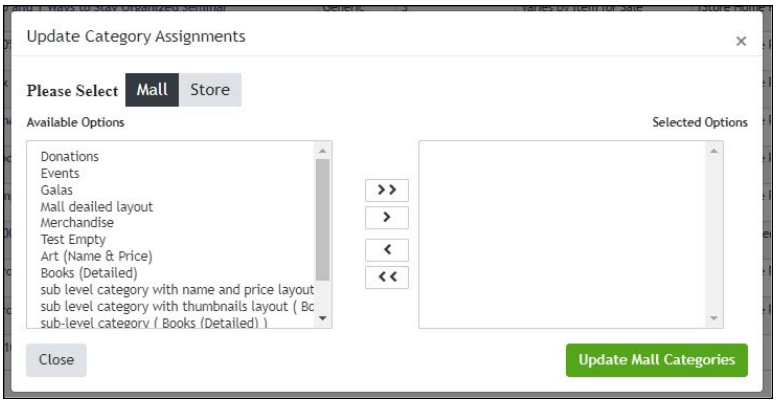
Enter the e-mail addresses of everyone who should be notified when this product sells. Enter a comma between e-mail addresses. This field will hold a maximum of 500 characters.



Category Settings

Mall Assignments

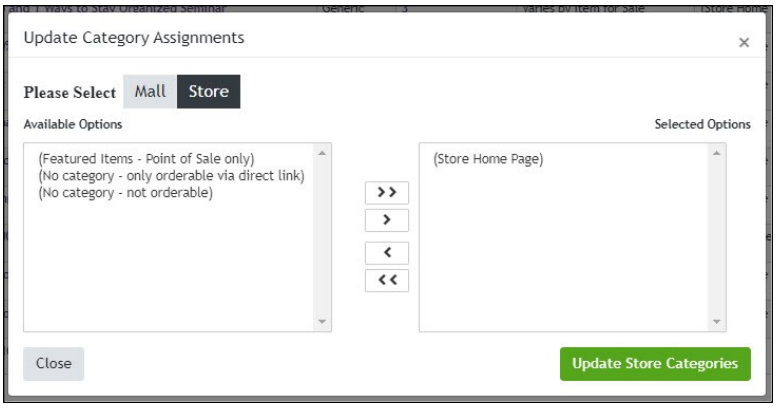
Products can be assigned to multiple mall product categories. These assignments are displayed in the Assignments column. If you would like to change these assignments or add new assignments, click the "Update Assignments" link in the Actions column. The Update Category Assignments modal page the appears.



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 "Update Assignments" link in the Actions column. The Update Category Assignments page then appears.

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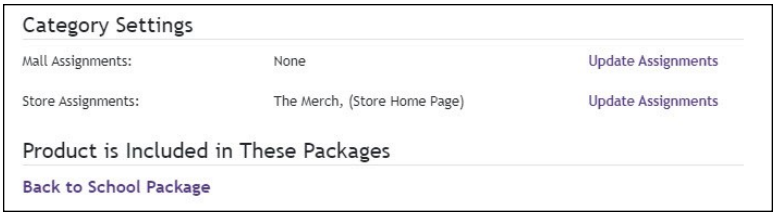


The Manage Category Assignments page allows you to assign mall and store categories to a single product.

You can assign your product to multiple mall categories (for more information, see **"Mall Product Categories" on page 45**) and store categories (for more information, see **"Store Product Categories" on page 241**). 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.

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 408**.



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

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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.

Point of Sale Description

Shoppers see this point of sale product description in the detailed product layout. This field accepts a maximum of 500 characters. This field does not accept HTML.

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.

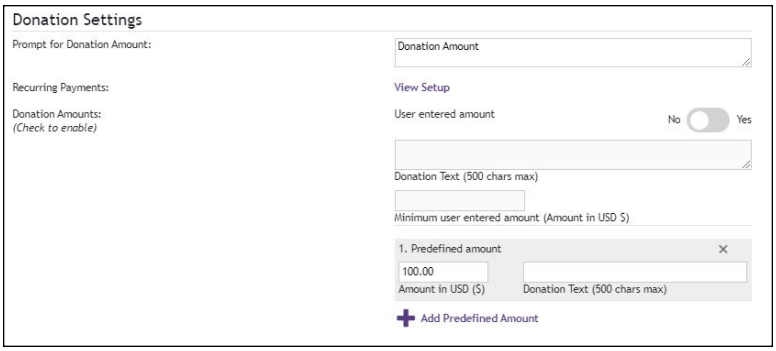
Note: You can use HTML in both the Short Description field and the Long Description field. HTML entered in these fields must be properly formatted. It will undergo a validation process and any improperly formatted HTML will not be accepted. We recommend you become proficient in authoring HTML before 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.

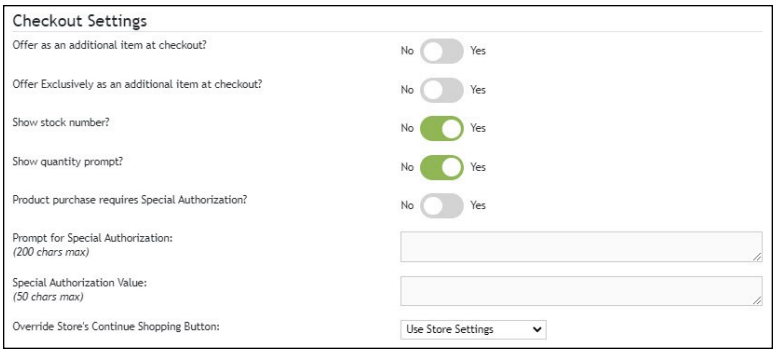
Donation Settings

The Donation Settings section of this page only appears if the product is a donation product. For details on the Donation Settings section, see "Editing Donation Settings" on page 323.

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Checkout Settings



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.

Offered exclusively 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?

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.

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Show quantity prompt?
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 **"User Groups and User Authentication" on page 110**.

Override Store's Continue Shopping Button
You can choose from four different options:

- Use Store Settings
- Use Default Settings
- Navigate to Store Page
- Navigate to Product Page

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Shipping / Tax / Accounting Settings



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.

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 288** for more information about setting up a shipping class appropriate for donations. For more information about shipping classes, see **"Shipping Classes" on page 236**.

Tax Class

You can choose from three different options:

- No Tax Nate
- Default Tax Rate
- Higher Tax Rate

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.)

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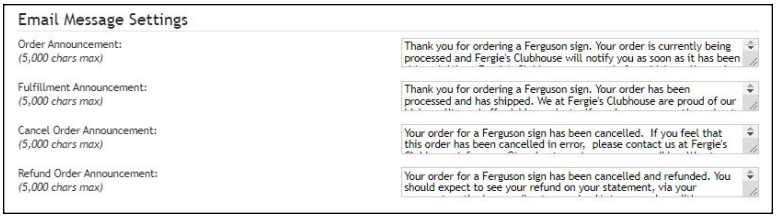
For more about tax classes, see "Tax Account Codes " on page 55.

Override Default Accounting Code

You can choose from several different options. These options are only present if the Perform General Ledger Updates option was selected when the store was established. For store's that use the general ledger system, the store's default accounting code is displayed. You can choose either to use the default accounting code or select an override from the Accounting Code Override dropdown menu. For more information about accounting codes, see "Merchant Accounting Codes" on page 120.

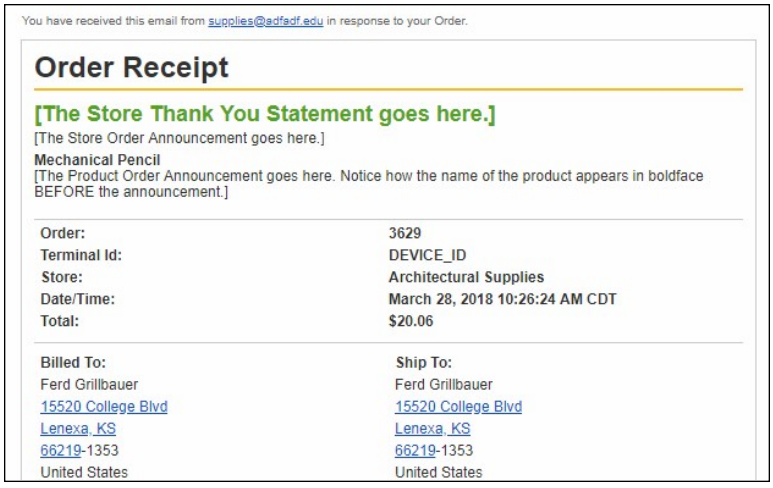
Email Messages

The following fields will appear on e-mail messages that are automatically sent to customers when orders are received, fulfilled, cancelled, and refunded. These announcements are product specific and are in addition to any announcements that are configured in the store settings.



Order Announcement

The Order Announcement appears on e-mail messages generated to customers after orders have been placed for this product. Use this announcement field to enter a paragraph that provides customers with relevant information about the product they have ordered. Characters entered in this field will appear as text in e-mail messages. (5,000 characters max.)



A sample Order Receipt with store order announcements AND product order announcements.

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Fulfillment Announcement

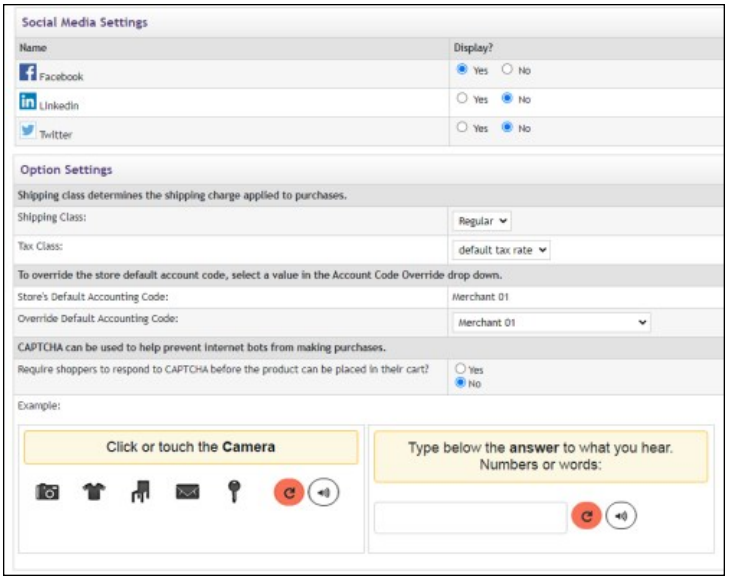
The Fulfillment Announcement appears on e-mail messages generated to customers upon the completion of the fulfillment process. Use this announcement field to enter a paragraph with relevant information about the fulfillment of the product that they ordered. Characters entered in this field will appear as text in e-mail messages. (5,000 characters max.)

Cancel Order Announcement

The 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 payment card number is incorrect, because the customer's payment card has expired, etc.). Use this announcement field to enter a paragraph that provides the customer with relevant information about the product that was ordered. Characters entered in this field will appear as text in e-mail messages. (5,000 characters max.)

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 provides the customer with relevant information about the product refunded. Characters entered in this field will appear as text in e-mail messages. (5,000 characters max.)

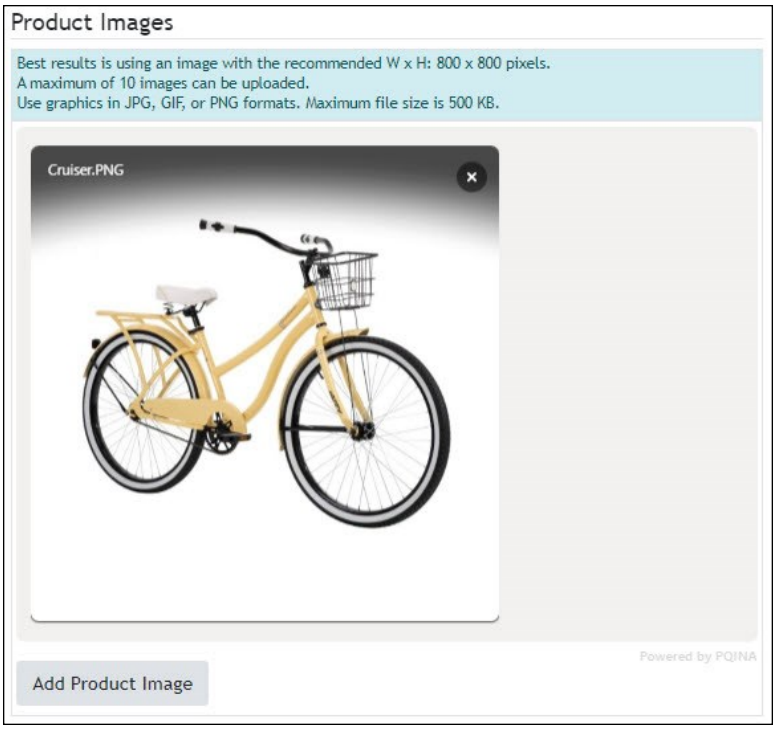


The Social Media Settings and the Option Settings on the Product Settings page.

Product Images

Select the Add Product Image button to upload up to ten product images.

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QR Code Settings

You can add a QR code for the product here.

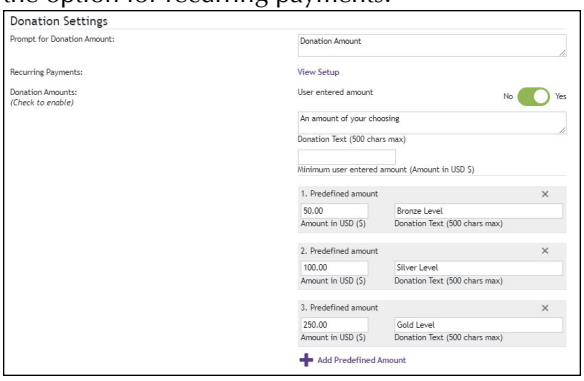


Editing Donation Settings

Donations can be edited like generic products; however, additional fields appear for configuring the donation amount fields and prompts, as well as

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the option for recurring payments.

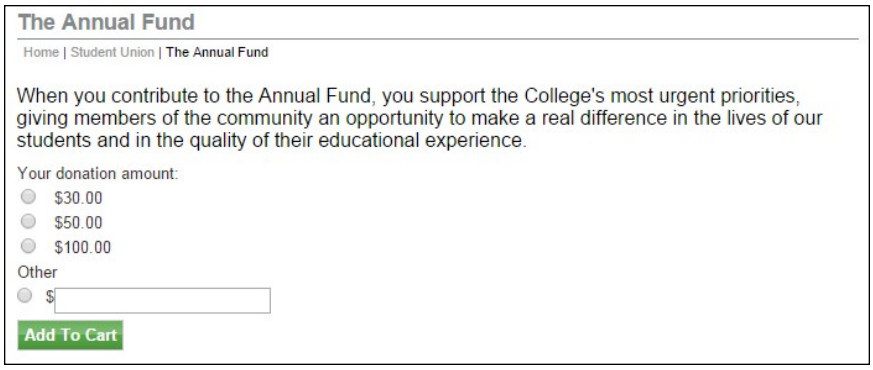


Field descriptions:

- **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).
- **Recurring Payments (View Setup)**—In order for the recurring payments to be available as an option, and for the View Setup link to be available, the Auto Fulfill field must be set to Yes in the Product Settings. When you select the View Setup link, the Recurring Payment Settings page appears. For information about configuring a product to accept recurring payments, see **"Editing Recurring Payment Settings" on page 335**.
- **User entered amount**— Toggle this switch to Yes to display a field to the donor in which they can enter a specific donation amount (instead of selecting a pre-set amount).
- **Donation Text**—You can add label text to each donation amount. For example, if each donation amount represents a particular contribution level, you can add a contribution level description to each pre-set donation amount by making entries in the Donation Text column for each corresponding donation amount. For example, you might set up the donation levels of Friend ($30), Partner ($50), and Champion ($100), as shown in the above screen shot. The Donation Text field can contain a maximum of 500 characters. By entering a value in the Donation Text column for the "User entered amount," you can override the default "Other" field label that appears in uStores. For example, you might enter "Or enter a different donation amount:" to appear in place of "Other."
- **Minimum user entered amount**—The default minimum user amount is $0.01. This is the amount that will be used if you have made no entry in this field. However, you can enter a value of $0

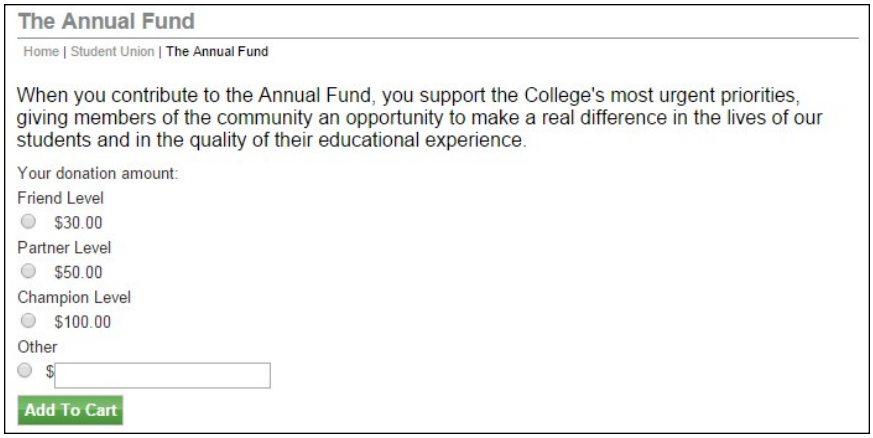
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or greater in this field. (Yes, donations products can be configured with a minimum donation amount of $0.)



If pre-set donation amounts are used, the prompt for donation amount appears immediately above the pre-set donation amounts.

- **[numbered amounts with checkboxes and dollar amount fields]**—Select a numbered 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 below 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. If a "User entered amount" field is also used, the word "Other" (by default) will appear in uStores above the "User entered amount" field. (See the Donation Text field below for information about how to modify the display text for the "User entered amount" field.)



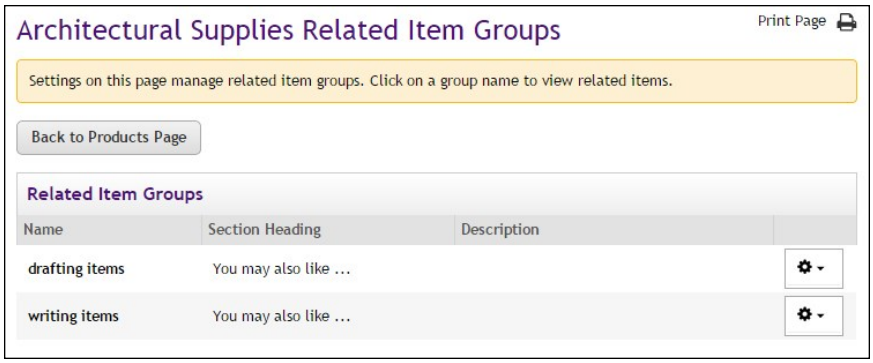
When the Donation Text fields are used, the Donation Text entries appear above the corresponding amount fields.

Managing Related Products

After products have been related by using the Products page (as described in **"Creating Related Product Groups" on page 303**), you can maintain these products groups by using the Related Item Groups page. To get to this

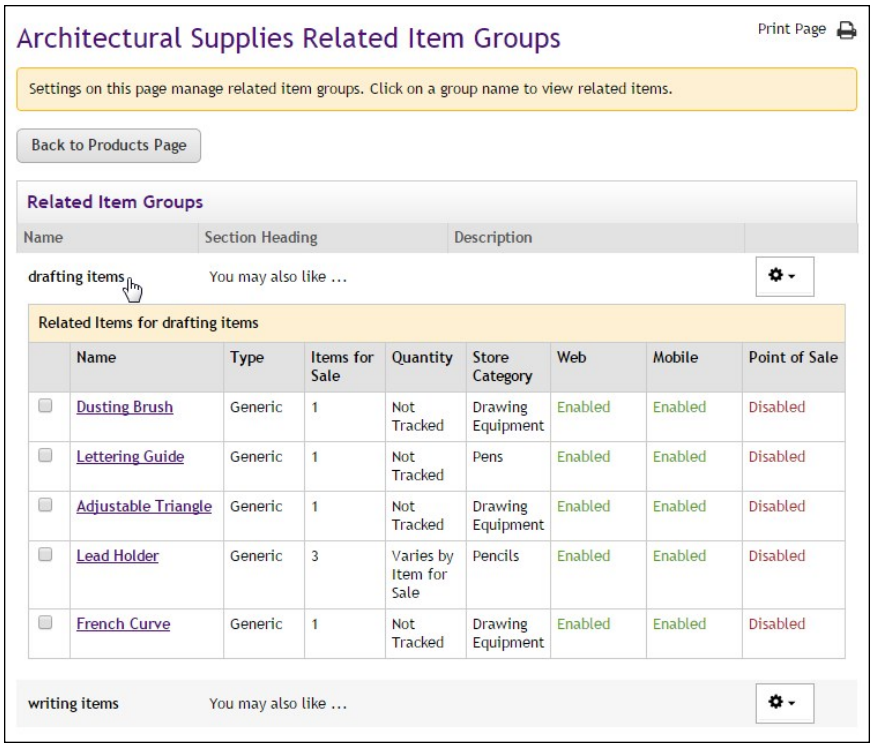
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page, you must first navigate to the Products page: To open the Products page, the store manager or merchant manager navigates to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products. Once the Products page appears, select the Related Items button near the top of the page. The Related Item Groups page then appears.



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.



By clicking a related item group name, a list of all products in that group appears.

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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 303**.)
- **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.

Creating or Modifying an Attendee List

Attendee List functionality allows you to configure an attendee list for display when customers view the Product Details page in uStores. This functionality was specifically created for event products so that prospective registrants can browse the list of registered attendees and possibly make their decision about whether to attend based on the names they recognize on the list. (However, Attendee List functionality can be used with any type of product.)

Attendee lists depend upon product modifiers. As customers make product modifier entries and selections during the process of adding products to their shopping carts, the modifiers are used to build the attendee list. Here are some examples of modifiers that might be included in an attendee list: a customer name, a year of graduation, a current occupation, or a state of residence. So in order for a product to utilize attendee list functionality, the product must have been configured with modifiers, as described in **"Using Product Modifiers" on page 355**.

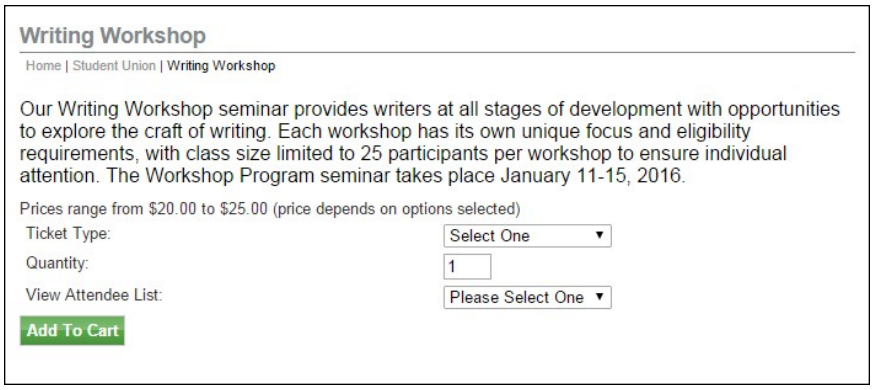
Modifier entries and selections made by a customer do not appear in an attendee list until the order has been fulfilled.

Note: If a Marketplace Operations Center user would like to *manage* a list of attendees, we recommend use of a Product Detail Report. Product Detail Reports include modifiers and can be downloaded and customized.

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What Customers See

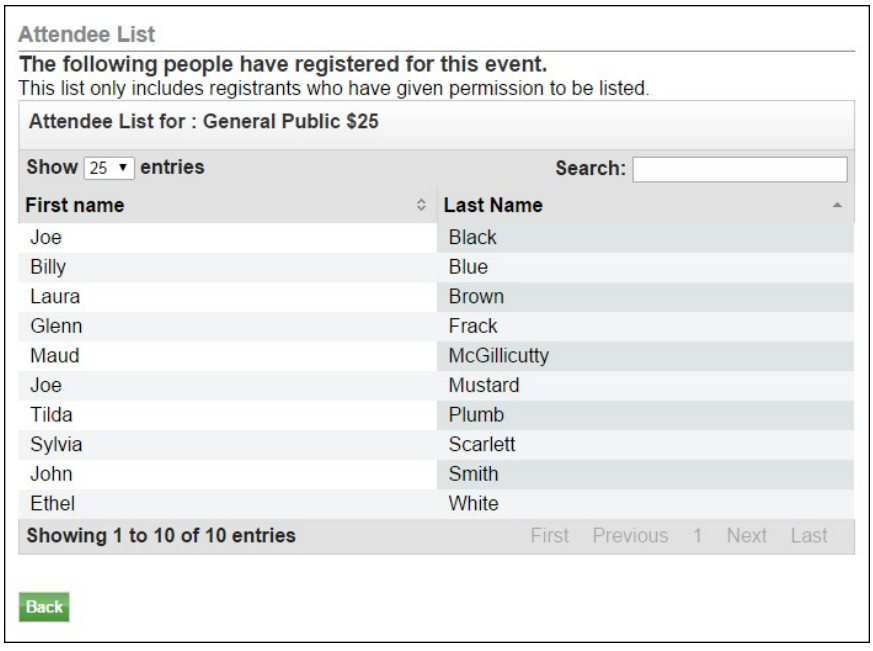
When a product has been configured for an attendee list, customers will encounter a "View Attendee List" option when they view the Product Details page in uStores.



"View Attendee List" appears on the Product Details page in uStores.

If the product includes multiple "Items for Sale" (i.e., if the product has been configured with product options, as described in **"Using Product Options" on page 343**), then a dropdown list will appear in which the customer must select an "Item for Sale" in order to display an attendee list. If the product has no product options, then a View Attendee List button will appear instead.

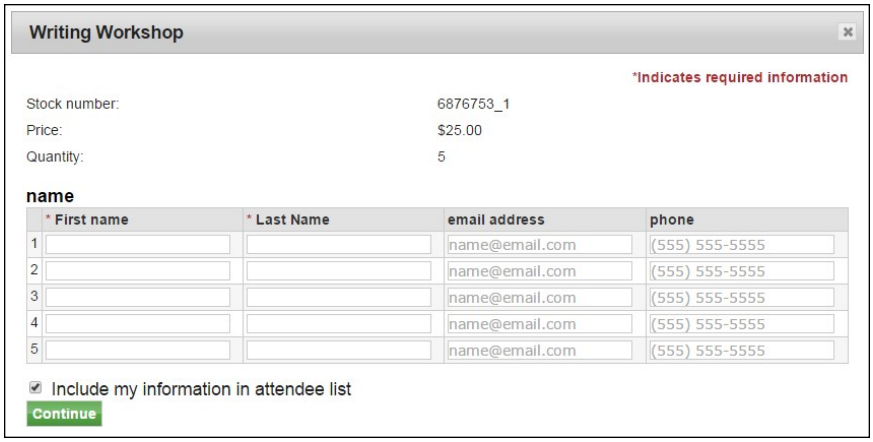
Here is an example of an Attendee List as viewed by a customer in uStores:



An Attendee List can be sorted and searched.

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When a product is configured to use an attendee list, uStores customers are given the opportunity to include their information in the attendee list. This opportunity appears when the customer attempts to add the product to their shopping cart. The modifier selection page then appears.



Customers can opt out of inclusion in an attendee list.

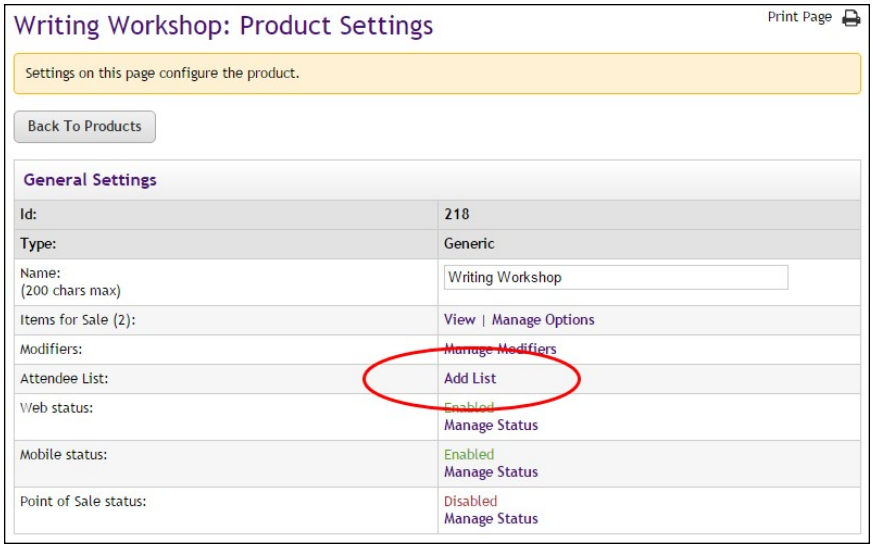
A checkbox appears on the modifier selection page. This checkbox is labeled "Include my information in attendee list". By default, the checkbox is selected. If a customer does not want his or her information to appear in the attendee list, the customer must uncheck this checkbox.

Configuration Settings

To configure a product to use an attendee list or to modify an existing attendee list, 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. Choose the product for which you would like to add an attendee list by selecting the product name link. The Product Settings page appears.

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The Add List link appears on the Product Settings page.

3 Select the Add List link.

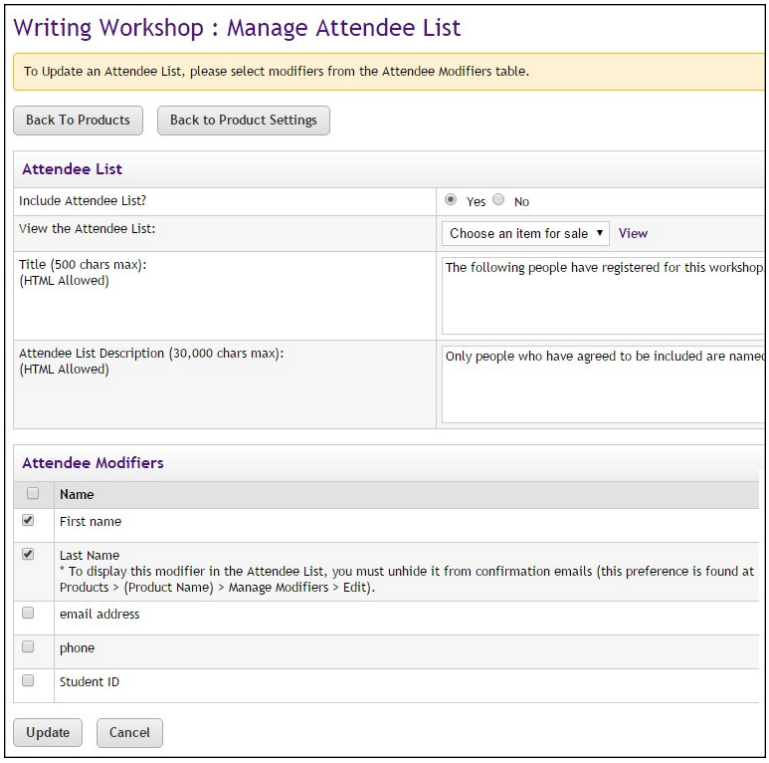
Or if an attendee list has already been created for this product and you would like to manage the list, select the Manage link.



The Manage link appears if an attendee list has already been created.

The Add Attendee List page then appears or the Manage Attendee List page appears. (These pages are very similar but the Manage Attendee List page includes functionality for viewing the list and managing which registrants are included in the list.)

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The Manage Attendee List page.

4 Edit the fields on the Manage Attendee List page (or complete the fields on the Add Attendee List page). All the fields are described below in the "Field Descriptions" section.

5 Select the Save button.

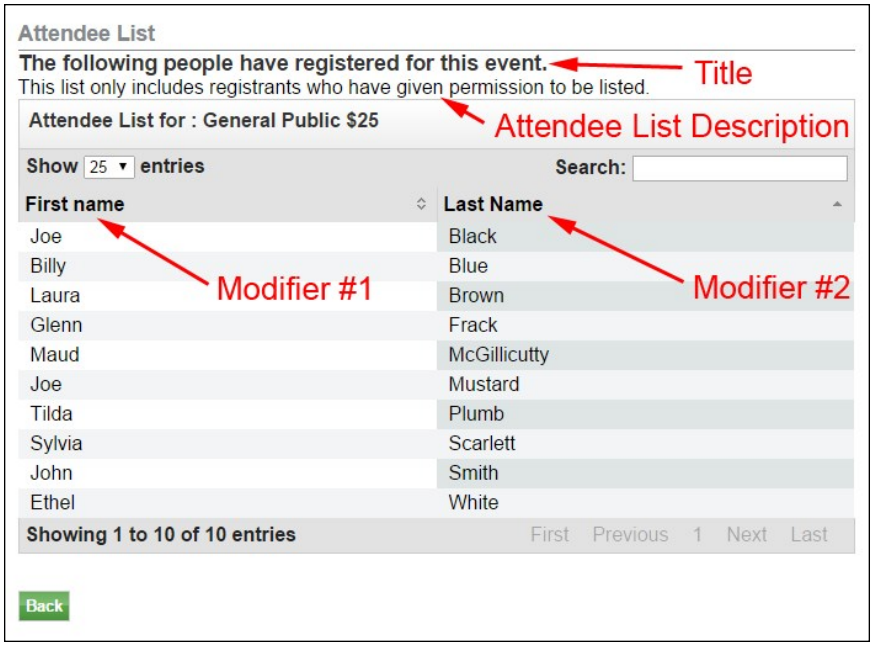
Field Descriptions:

Attendee List

Include Attendee List?

No is selected by default. When you have finished configuring an attendee list, you can turn on the display of the list by selecting Yes. Once Yes is selected, customers will see an option to view the attendee list when they view the Product Details page for this product in uStores. However, all attendee list settings can still be saved when No is selected.

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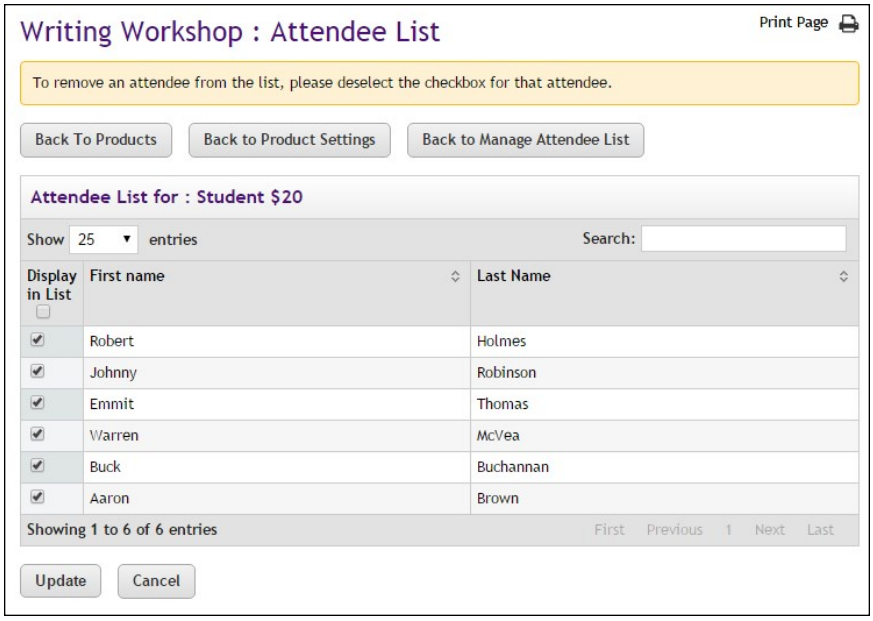
Here is where the Title field and the Attendee List Description field appear on the Attendee List page in uStores. This example also shows how two modifiers (First name and Last name) are displayed in the Attendee List.

View the Attendee List

You can use the View functionality to view the current state of the Attendee List, including modifier information saved with orders.

If the product has options and more than one item for sale, a dropdown list will appear. You must select one of the items for sale and then select the View link. If the product has no options and only one item for sale, the dropdown list does not appear, only the View link.

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You can edit which attendees are included in the list.

After you select the View link, the Attendee List appears. If necessary, you can remove attendees from the list by unchecking the "Display in List" checkbox and selecting the Update button.

Title

This field is displayed near the top of the Attendee List page. Use this field to provide a descriptive title for the attendee list. This field may contain a maximum of 500 characters. HTML is allowed. (The page title "Attendee List" appears at the top of the page. The "Title" field appears next.)

Attendee List Description

The Attendee List Description appears immediately below the Title field on the Attendee List page. Use this field to provide important information that customers need to know about the list. For example, you might include text that tells customers that attendee lists only include those attendees for which permission was granted. This field may contain a maximum of 30,000 characters. HTML is allowed.

Attendee Modifiers

Name

All modifiers for this product are listed in the Name column. The modifiers are listed in alphabetic order (according to modifier name). Select the checkbox for each modifier that you would like to include in the attendee

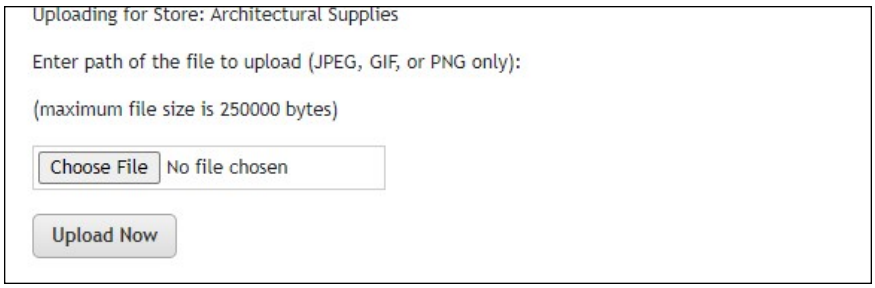
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list. You should avoid including any sensitive customer information, such as an e-mail address, a phone number, or a street address.

You should limit the number of modifiers that you select to display in the Attendee List. There is typically only enough room in the uStores display to accommodate two or three columns. If the columns do not contain very much information, possibly four columns will fit, but rarely more columns. You should test the display of the Attendee List in uStores to ensure that it looks as you expect.

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 dialogue window, which allows you to browse for images on the hard drive as well as network locations.

With Marketplace 8, Feature Pack 1 new features have been added to assist in adding and editing product images. The new features are:

- You can add up to 10 images to a product or package.
- To reorder the display of images, you can drag and drop the desired image to the desired position.
- The first image will be considered the primary image and used for Marketplace Point-of-Sale, the store home page, mall and store category pages, additional items pages and related items tiles.
- When cloning product all images will be copied to the new product.
- Product images will now be shown at 500 x 500 pixels in the Marketplace Operations Center, no matter the side of the uploaded image.
- Product image sizes will now be validated when they are uploaded, ensuring they do not exceed the new size limit of 500K.
- The related items images will now display with a left and right arrow to scroll through the images, instead of stacking them.
- A carousel has been added to scroll for related items.

Follow these guidelines when choosing images:

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

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- Full size product images are best displayed at 500 pixels wide by 500 pixels high.
- All images must have file sizes of 500K or less.

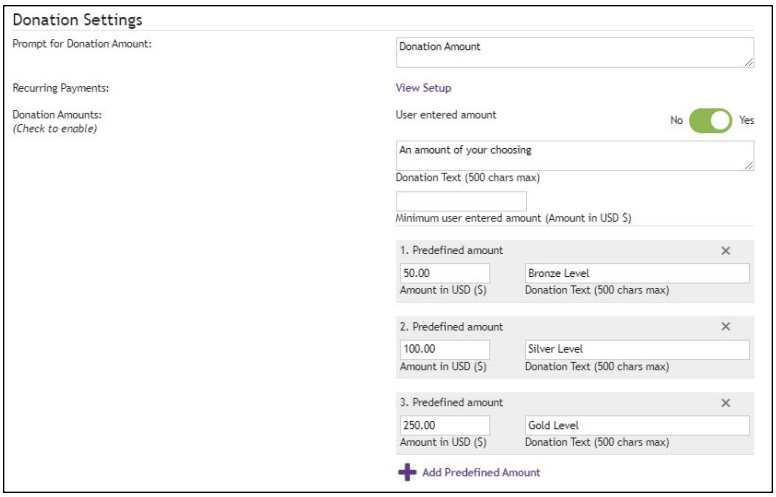
Note: The file name of each image must be unique within a store. If you upload an image that uses the same name as another image within the same store, the original image will be overwritten. So remember to always use unique names for images.

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.

Editing Recurring Payment Settings

To edit the recurring payment settings for a donation product, you start by navigating to the Product Settings page for the product that you would like to edit (as described in **"Editing Products" on page 306**).

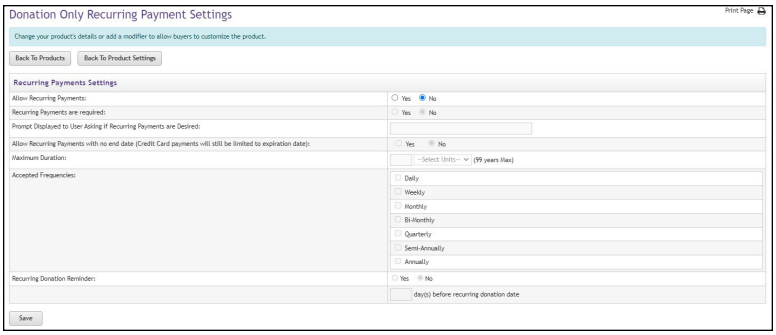
The link for setting up recurring payments is located in the Donation Settings section of the Product Settings page. Look for the View Setup link in the Recurring Payments field.



When you select the View Setup link on the Product Settings page, the Recurring Payment Settings page appears.

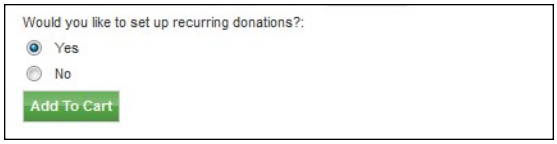
Note: In order for the View Setup link to be available, the product's Auto Fulfill field must be set to Yes.

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Field descriptions:

- **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.



The recurring payments prompt appears before donors place the item in their shopping cart.

- **Allow Recurring Payments with no end date**—If you select Yes for this setting, customers will not be prompted for an end date when setting up recurring payments. The applicable end date will be the Maximum Duration or (if the customer is using a payment card) the payment card's expiration date.
- **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 payment card cannot set up a donation period that exceeds the expiration date on their payment 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.

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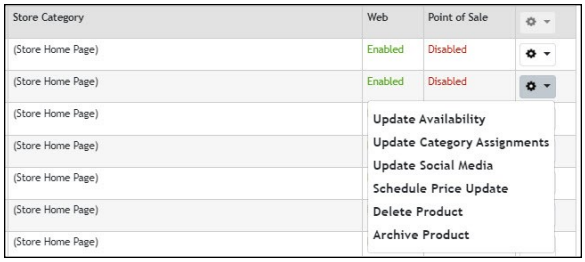
- **Recurring Donation Reminder**—Your customers may appreciate receiving a recurring donation reminder message before each recurring payment is processed. To turn on recurring payment reminders, select Yes for Recurring Donation Reminder. Once you select Yes, you must also enter a number in the "day(s) before recurring donation date" field.

  Note: The announcement message that appears in these recurring donation reminder messages can be configured on the Email Addresses page, as described in **"uStores E-mail Addresses" on page 473**. Make sure you have considered what this announcement will say before you select Yes for the Recurring Donation Reminder field.

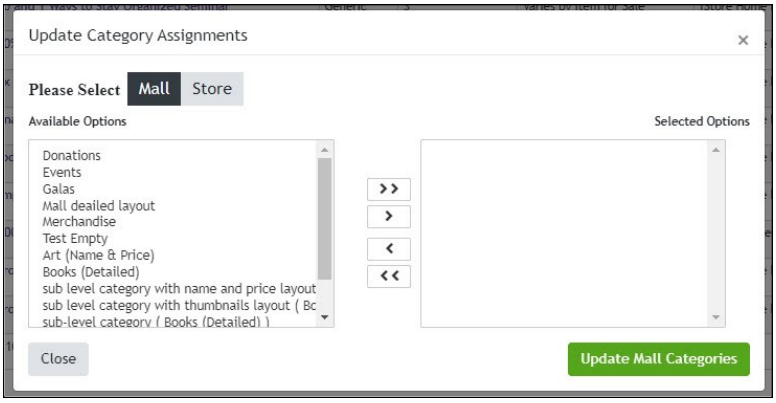
Managing Category Assignments

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.



3. Select Update Category Assignments from the flyout menu. The Update Category Assignments modal page appears.

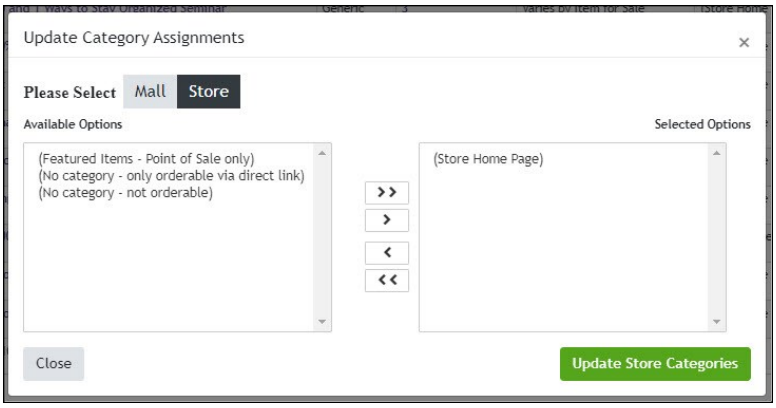


The Manage Category Assignments page.

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4 Click the > [greater than] sign in the left column for each category you would like to add. If you would like to remove any category assignments, click the < [less than] sign in the right column for each corresponding category. To move all of the categories, use the > > and < < signs.

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.
- **Featured Items - Point of Sale only** —Products in this category are shown only at the point of sale.
- **No category - only orderable via direct link**—Products in this category do no 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 no 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.

5.5 Copying a uStores Product

With Marketplace 8.2 a new feature for uStores has been added that allows products to be copied to another uStore, within the same environment (i.e.,

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within production, within test).

This feature also enhances and replaces the existing Product Cloning feature used within the same store. The Clone Product action has been removed from the Products table gear wheels.

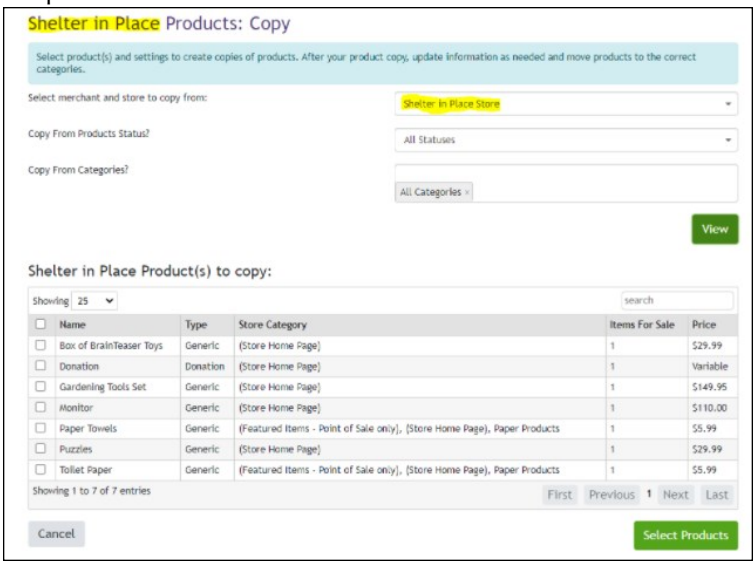
Merchant Managers, Store Managers and Store Clerks will see a revised button bar at the top of the Products page within each uStore. This button bar includes buttons for existing features like adding new products, importing products from .CSV files, managing related groups and printing barcodes. New buttons for copying products and managing archived products have been added.

When the Copy button is clicked the administrative page will be refreshed with selection criteria for:

- Merchant and Store to copy from
- Product Statuses to copy from
- Categories to copy from

This will allow the user to tailor the list of products from which they can copy, an important feature for stores with thousands of products. The user will only see merchants and stores that they also have access to.

By clicking the View button the page will refresh with a list of products in the copy from store that met the user's criteria. In the example below, all the products in the same store were returned:



> **Note:** The product cloning feature that is being replaced by this project allowed only one product to be copied at a time (with up to 5 copies).

Once products for copying have been selected the user will click "Select Products" and a table will be refreshed with the copy from product's name, price and status. The user will be able to rename the product (but not the items for sale), assign stock number and inventory, update price, shipping

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class and web or point of sale status. If an image is uploaded the user will be able to decide whether to copy that image or not. If a digital product, the user will be able to decide if the digital file should be copied.

Important Notes About Copying Products

Here are some notes to keep in mind when copying products:

- Package products cannot be copied. Packages can be created from the products once they have been copied.
- Categories will not be copied as a part of the copy process. They can be assigned post product creation using the Product page gear wheels.
- Marketplace recommends that the user review each product after creation so that they can adjust descriptions, features, categories, etc.
- Digital file space will be checked during the copy process. If the Copy To store does not have enough digital space to complete a copy the user will be notified prior to the copy taking place.
- When copying products with General Ledger turned on, the GL code (s) will be validated against the Copy To store/merchant. If valid they will be copied; if invalid a warning will appear during the copy process and the product will be set to store default.
- When donation type products with recurring payment settings turned on are copied, Marketplace will check the Copy To store to verify recurring payments are allowed. If they are, the recurring payment settings will be copied. If they are not, recurring payments will be set to No for the product and a warning message will appear upon completion.
- When Invoice Payment method is turned on for a product Marketplace will check the Copy To store to verify it is a valid payment method. If it is, the invoice me payment availability settings will be copied. If it is not, invoice me will be set to No for the product and a warning message will appear.
- QR codes are unique to each product. The newly created products will have their own QR codes.
- Scheduled price changes will not be copied as a part of this process. The current price (sale or full price) will be displayed to the user during the copy process.
- When copying products across stores, the product notification email addresses will not be copied.
- Promotions and Related product groups will not be updated for copied products.

Note: The Import product for a .CSV file administrative pages have also been refreshed with this project. Import product pages in the Operations Center have been revised to share some of the UI elements and to insert

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into the database in the same manner that copy products does. In addition, one customer requested enhancement has been completed, inserting the products into the Store Home Page Category in the sequence of the .csv file (as opposed to alphabetical order). Sort orders can be adjusted manually post import if desired.

Archiving a uStores Product

On the Products page for each uStore the Merchant Manager, Store Manager or Store Clerk will see the Delete and Archive options in the product table action gear wheels. Delete and Archive options will be available for all products.

Note: The Delete link will work as it does today, removing the product from Marketplace Operations Center in its entirety. Packages that contain the deleted product will also be deleted from Marketplace Operations Center in their entirety. Order history and reporting will continue to be available for deleted products. When deleting a product a pop-up confirmation window appears explaining this functionality.

The Archive link will remove the product from view in the Products menu option. If the product is a part of a package, the package will also be archived. Archived products and packages will:

- Be set to a disabled status for web and point of sale
- Items for sale (aka options) associated to products and packages are also archived
- Archived products will be removed from product categories
- Archived products will not display in the mall or store
- Archive products will not display as an additional item at checkout.

uStores order history will still be available for reporting and advanced order searches. Refunds can still be completed for archived products (within the 1 year limitation period).

When the Archive link is clicked a confirmation window will appear explaining this feature to the user. The user will be returned to the Products page with a success message and an Archived button will appear at the top of the page.

Archived Page

The new Archived page will display all products (and associated packages) that have been archived. This button/page will appear only when there are archived products. When accessed, this page will display archived product name, product type, items for sale, by whom and when the site was

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archived and an actions gearwheel. The action wheel includes Delete and Restore functions.

Deleting from the Archived Products page will work the same as deleting from the Products page.

Restoring the Product

The Restore link will allow the user to restore the product with associated items for sale (aka options), in a disabled status, should it be needed in the future. If the product is associated to a package, each package will need to be restored separately. Products will also be re-inserted into the product categories but we recommend that users check the sort order.

Deleting a Product

You can permanently remove products; however, be careful when deleting a product because it cannot be restored. To delete a product:

1. Open the 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

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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.

5.6 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 355**.

Adding Product Options

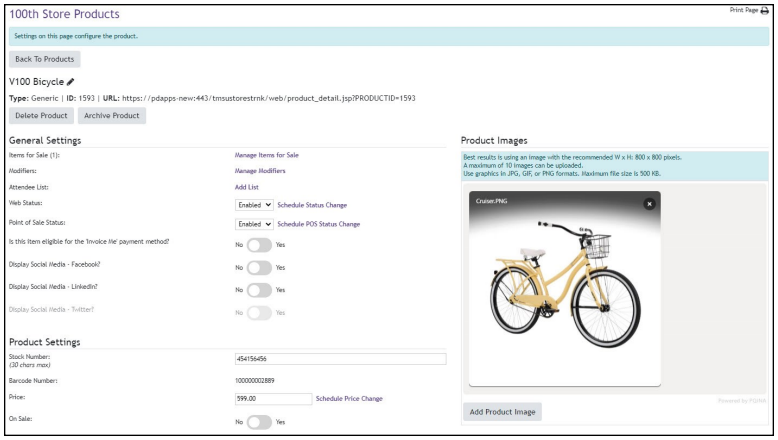
Follow these steps to add product options.

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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:



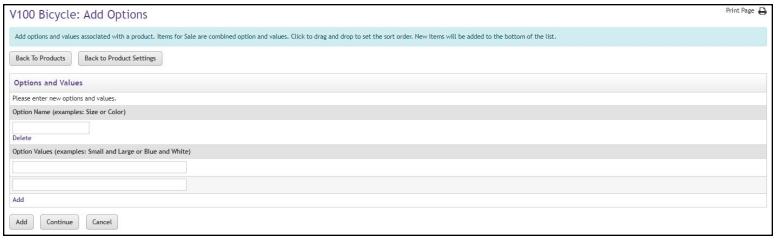
The "Manage Items for Sale" link appears.

Select the "Manage Items for Sale" link. The View Items for Sale page appears.



3 Select the Add Options button.

The Add Options page appears with fields for entering a new product option.



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.

5 Enter option values in the Option Values fields.

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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."

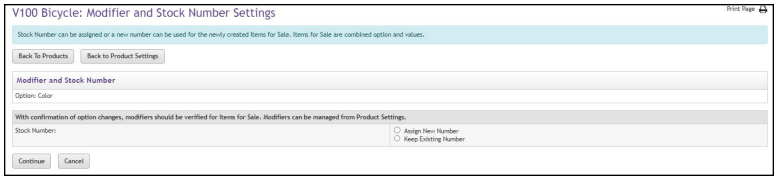
Only enter one option value per text box.

By default, you are given two Option Values fields. If you would like to enter more than two option values, select the "Add" text link below the Option Values fields. Each time you select the Add text link, you are given one more field for entering an option value. So continue to select the Add text link until the desired quantity of fields is available.

6 If you need to add more options, click the Add button. When you click the Add button, another section appears for entering an Option Name, as well as two Option Value fields.

7 Click the Continue button.

The Modifier and Stock Number Settings page appears.



8 Choose either Assign New Number or Keep Existing Number.

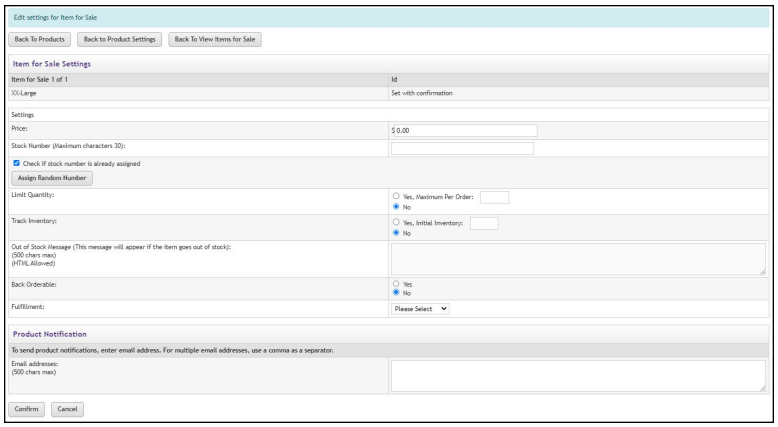
This page exists so that you can specify the fate of the original stock number for this product. Because you are adding options to the product, additional stock numbers will need to be generated. For example, originally the product might have been a white polo shirt. It was assigned the stock number 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.

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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. In this case, we have a white bycicle and a blue bicycle, so we would need to complete this page for both white and blue.

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 Number**—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.

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- **Track inventory?**—(Generic and Donation only) Mark Yes to track the product's inventory. If you select Yes, enter the initial inventory quantity.
- **Out of Stock Message** — this message will be shown if the product goes out of stock.
- **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.
- **Limit Order Quantity** — (Digital only) This option can be used to restrict the total amount of copies of a digital file a customer can download.
- **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.
- **Fulfillment**—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). Choose from Auto-Fulfill or Manually Fulfill.

  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.

- **Product Notification** — This box allows you to add email addresses for notification purposes.

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.

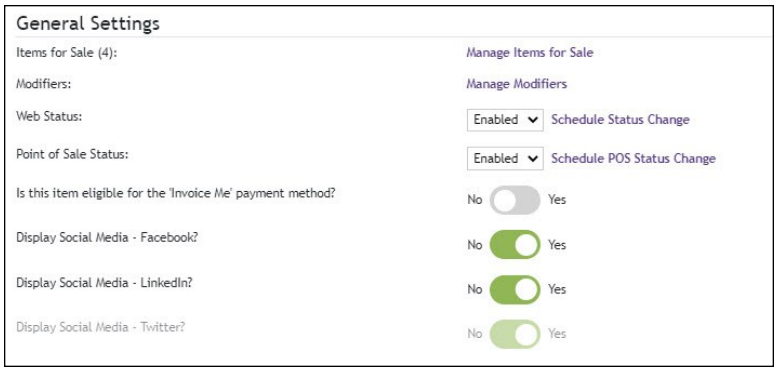
11 Click the Continue button when you are finished. You'll be asked to confirm the addition of the options.

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Modifying Product Options

Follow these steps to modify product options.

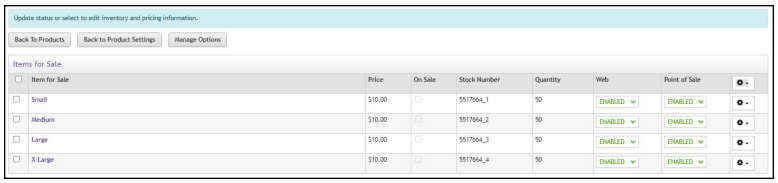
1. From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products. The Store Products page appears.
2. Click the product name text link in the Name column. The Product Settings page appears.



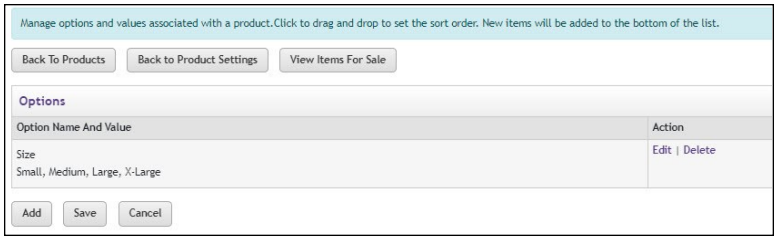
.

3. Click the "Manage Items for Sale" link.

   The View Items for Sale page appears.



4. The currently configured items will be listed in the Items for Sale table. Each item and its values are listed in the "Item for Sale" column. Click the Manage Options button to view the options for each item.

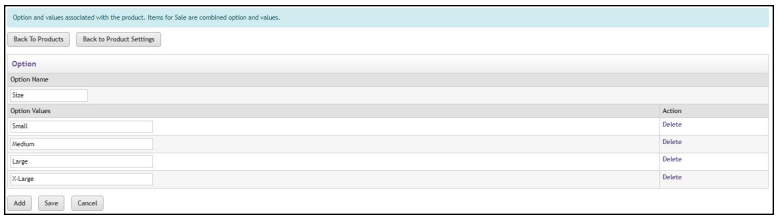


5. You can take the following actions:
   - You can click the Edit link to edit the corresponding option name and its values.
   - You can click the Delete link to delete the corresponding option.

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- You can click the Add button to add a new option and enter its values.

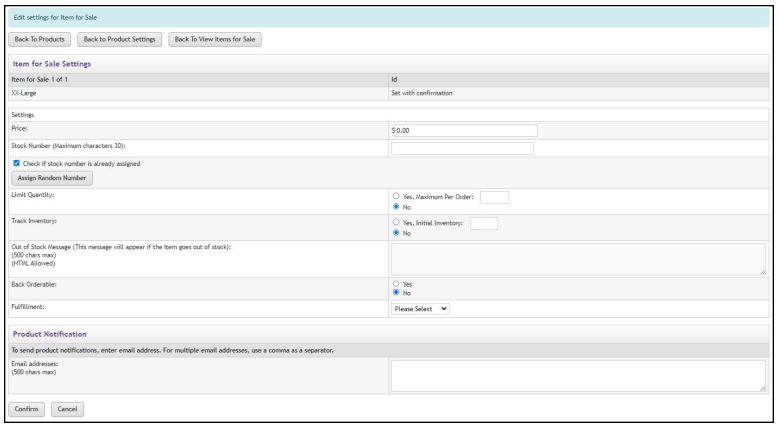
The following steps focus upon clicking the Edit link. If you would like to add options, see "Adding Product Options" above in this same topic. When you click the Edit link, the Edit Option page appears.



6 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:

- You can click the Save button to save any modifications you may have entered.
- You can click the Delete link in the Action column to delete the corresponding option value.
- You can click the Add button to add another section for entering another option value. After you enter the value name you can continue adding more option values, or you can click the Save button if you are done.

The following steps will focus on what happens after you click the Save button. The Item for Sale Settings page appears.



7 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" (or "XX-Large" here) 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:

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- **Price**—You must enter a price for the new Item for Sale.
- **Stock Number**—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.
- **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 .(The Out of Stock Message will also appear when the Detailed Product Category layout is used.)
- **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.
- **Limit Order Quantity** — (Digital only) This option can be used to restrict the total amount of copies of a digital file a customer can download.
- **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.
- **Fulfillment**—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

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materials are shipped to the customer). Choose from Auto-Fulfill or Manually Fulfill.

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.
- **Email Messages**—For a discussion of the Product Notification fields and the Email Messages fields, see **"Editing Products" on page 306**.

8 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.

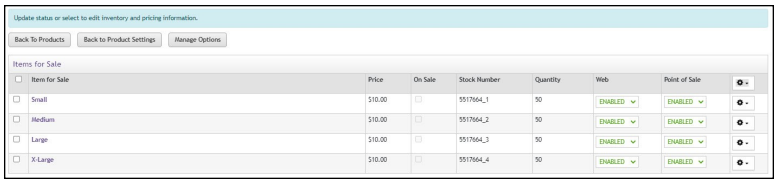
2 Click the product name text link in the Name column. The Product Settings page appears.



3 Click the "Manage Items for Sale" link.

The "View Items for Sale" page appears.

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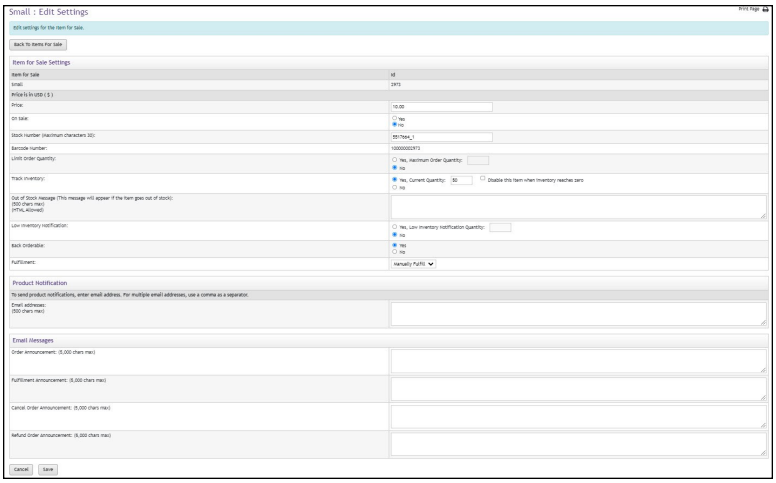


This page lists all the "Items for Sale" configured for the product. For each "Item for Sale," it shows price, stock #, quantity, and the enabled/disabled status. (You can also use this page to schedule price changes for each "Item for Sale".)

The name of the "Item for Sale" will represent the option combinations. For example, it 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.



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.
- **On Sale** —You can change this switch if you want to indicate that the item is on sale.
- **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.

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- **Limit Order 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.
- **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 .(The Out of Stock Message will also appear when the Detailed Product Category layout is used.)
- **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.
- **Limit Order Quantity** — (Digital only) This option can be used to restrict the total amount of copies of a digital file a customer can download.
- **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.
- **Fulfillment**—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). Choose from Auto-Fulfill or Manually Fulfill.

  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.

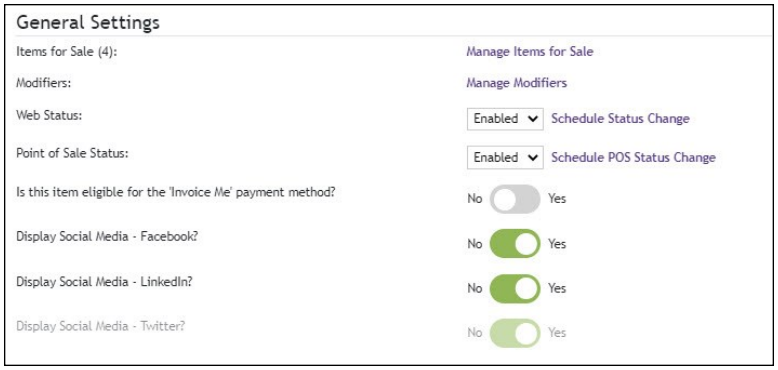
6 Click the Save button when you are finished. You'll be asked to confirm the addition of the options.

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Scheduling Price Changes for 'Items for Sale'

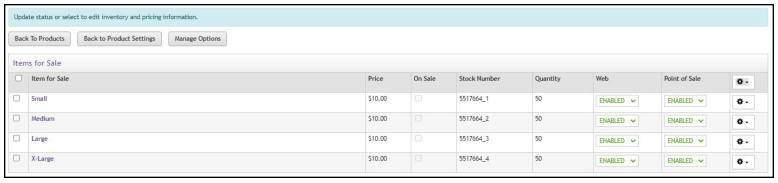
Once product options have been added to a product—and "Items for Sale" have been generated—you can schedule price changes for an "Item for Sale" by following these steps.

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.



3. Click the "Manage Items for Sale" link.

   The "View Items for Sale" page appears.



   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.

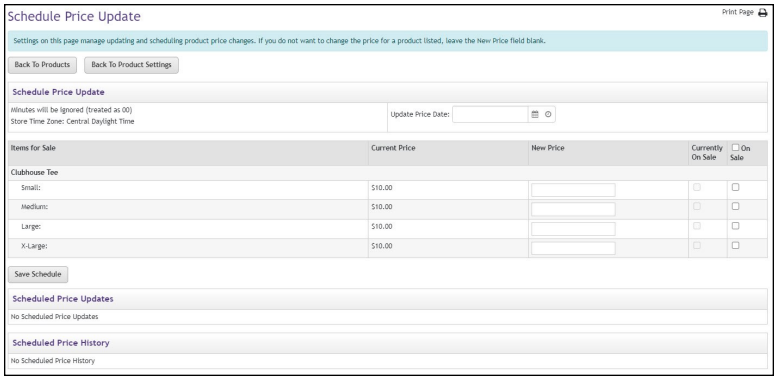
   Note: You can also schedule a price update for a single Item for Sale by using the Gear icon that is in the same row as the Item for Sale.



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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.



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 standard 12-hour clock.

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.

5.7 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 eight types of modifiers:

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- **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 drop-down selection. You can also manually drag-and-drop selections to place them in a specific order. If you make changes to these selections, press the"Update Modifier" button to save.
- **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. You can also manually drag-and-drop checkboxes to place them in a specific order. If you make changes to these checkboxes, press the"Update Modifier" button to save.
- **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.

The 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 358**.)

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 Display Groups" on page 386**.

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 388**.

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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)
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

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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")

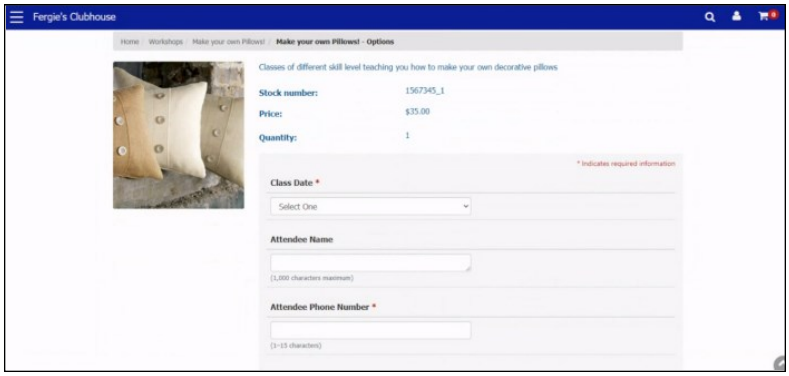
These options require different inventory items ("items for sale"). For more about options, see **"Using Product Options" on page 343**.

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

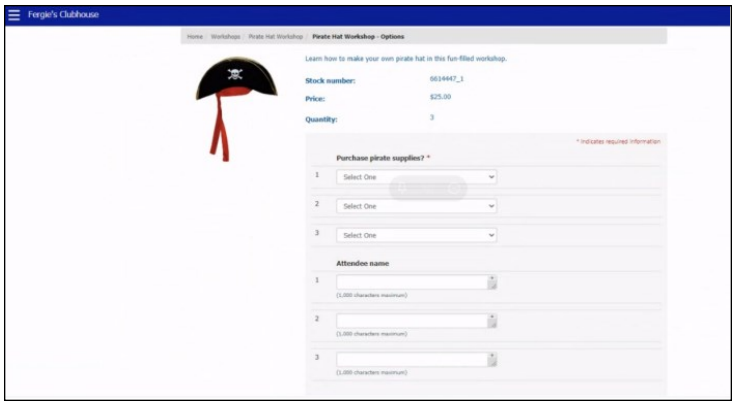
In the first example, all five modifiers are configured with the frequency of "**static**," so each modifier appears just once, regardless of the quantity ordered.



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Example 2

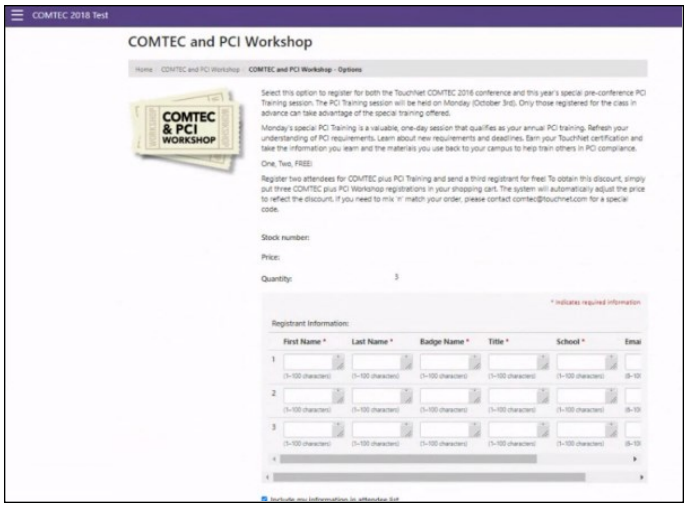
In the second example, the first three modifiers (Attendee Name, Attendee E-mail Address, and Attendee Phone Number) are configured with the frequency of "**dynamic**," so the customer will need to enter this information three times (because the order quantity is 3). The final two modifiers (Session Difficulty and Seating) are configured with the frequency of "static," so these modifiers only ask for one value each.



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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.

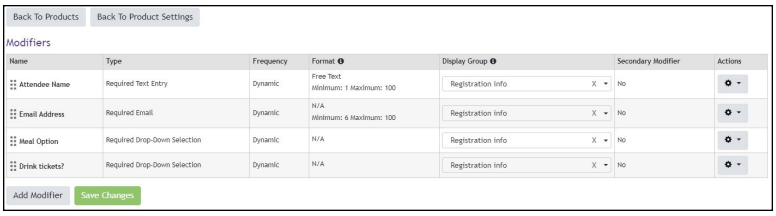


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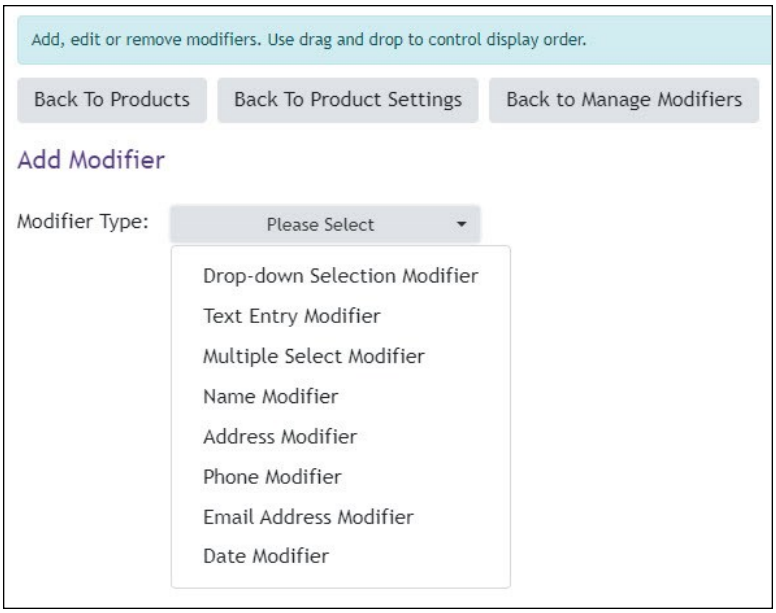
Modifiers Management

Product modifiers are managed on the Manage Modifiers page for each product.

The Manage Modifiers page in Marketplace Operations Center is accessed by going to the [store name] > Store Settings > Products page and clicking on a product name. In the product settings, a user will be able to click the "Manage Modifiers" link. User modifiers can be accessed via the or [store name] > Store Settings > User Modifiers page. When modifiers are already assigned to the product or store, a table with the valid modifiers will display. To add a modifier, click the Add Modifier button.



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 are not part of the basic product setup.



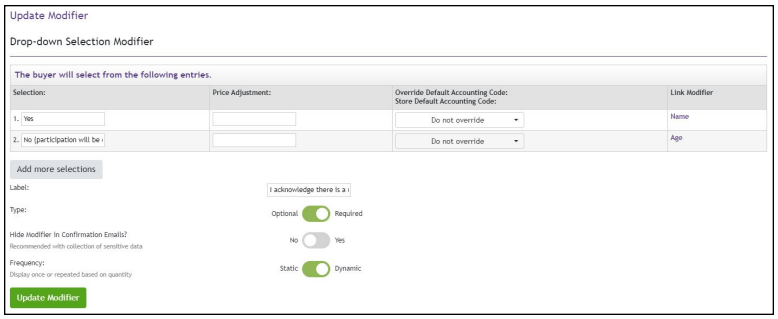
The Manage Modifiers page consists of the following sections:

Add Modifier—The top section is named Add Modifier, and it lists the types of modifiers that can be added to products.

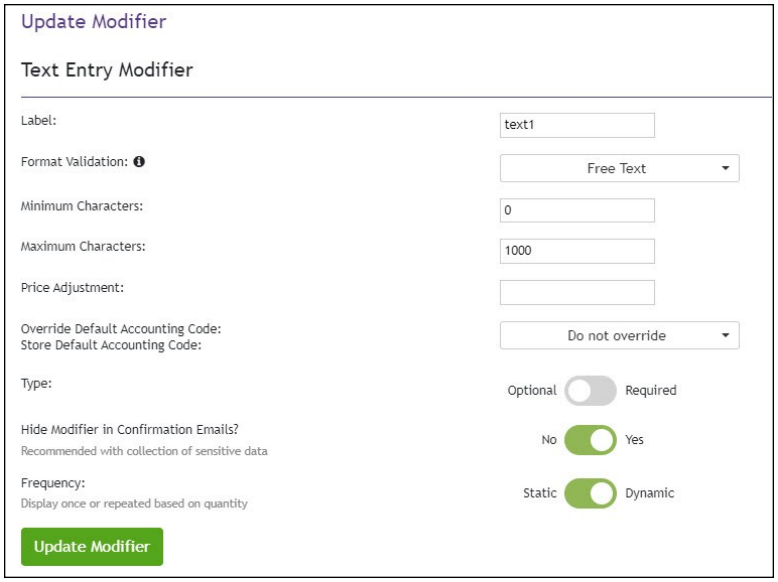
- **Drop-down Selection Modifier:** This modifier type allows the user to set up a drop-down selection entry field. Price Adjustments can be

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configured, as well as General Ledger Account Code overrides (if GL is turned on for the store).

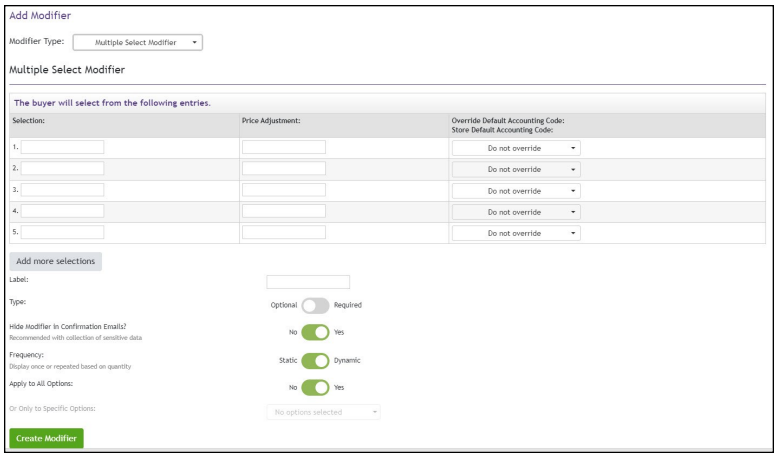


- **Text Entry Modifier:** This modifier type allows the user to configure a text entry field, with validations. Price Adjustments can be configured, as well as General Ledger Account Code overrides (if GL is turned on for the store).
  Note: Email, Phone and Date modifiers have been moved to their own modifier types and will no longer display within validation types under the Text Entry Modifier.

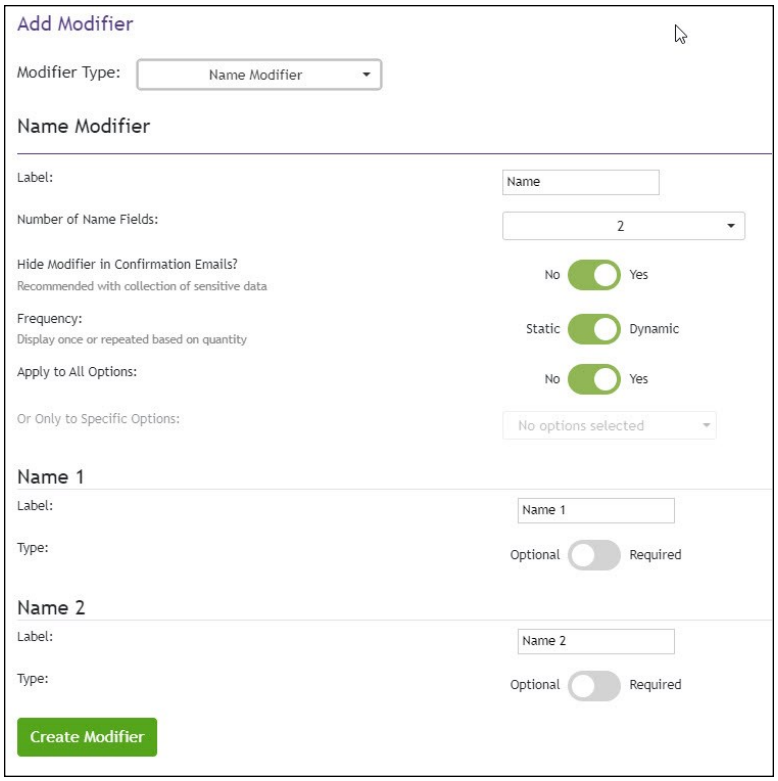


- **Multiple Select Modifier:** This modifier type allows the user to set up a checkbox list. Price Adjustments can be configured, as well as General Ledger Account Code overrides (if GL is turned on for the store).

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- **Name Modifier:** This new modifier type allows the user to configure 1, 2 or 3 text entry boxes for name entry. The admin will be able to assign a label to the grouping, label each text entry field individually for display and determine if each will be optional or required. The entry fields will be grouped together for display in uStores product or buyer modifier entry. Price adjustments will not be allowed for this type of modifier.

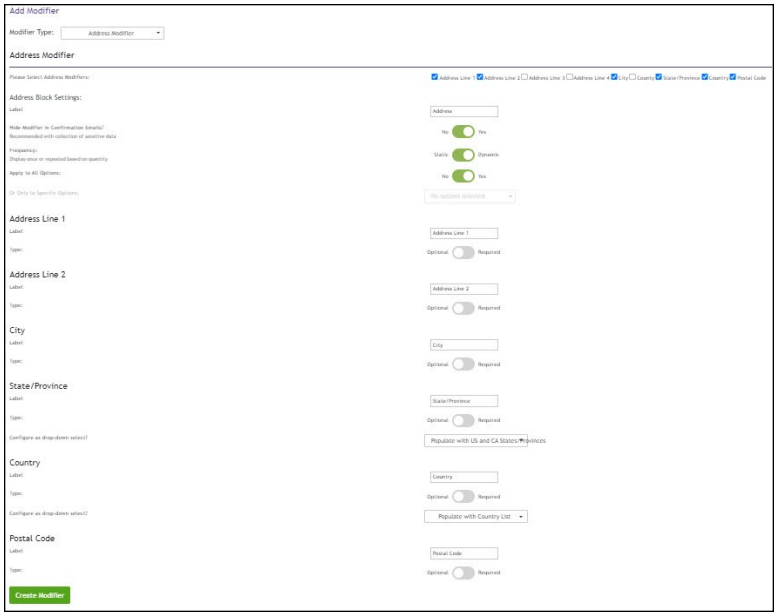


- **Address Modifier:** This new modifier type allows the user to configure the type of address information to be collected and to pre-populate

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the country and/or state/province lists. The admin will be able to assign a label to the grouping, label each entry field individually for display and determine if each will be optional or required. The entry fields will be grouped together for display in uStores product or buyer modifier entry. Price adjustments will not be allowed for this type of modifier.

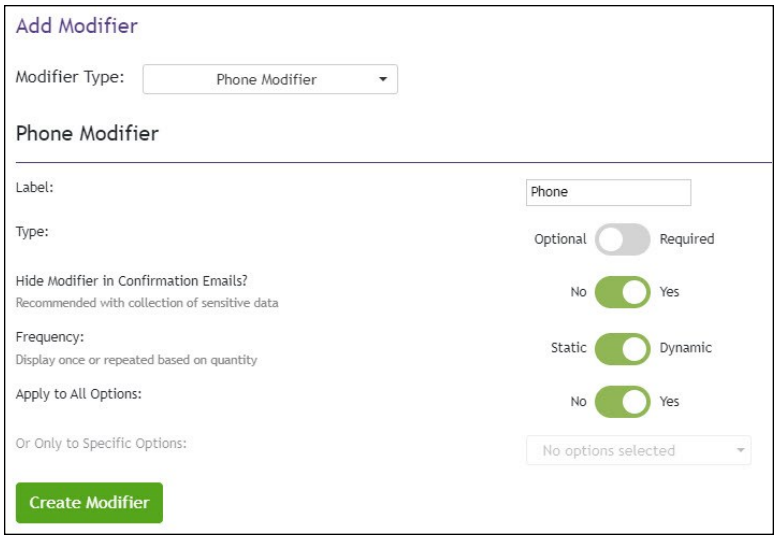
Note:US states and Canadian provinces are supported for pre-configuration at this time. If pre-population is not selected for either the Country or State/Province list a text entry field will be utilized.



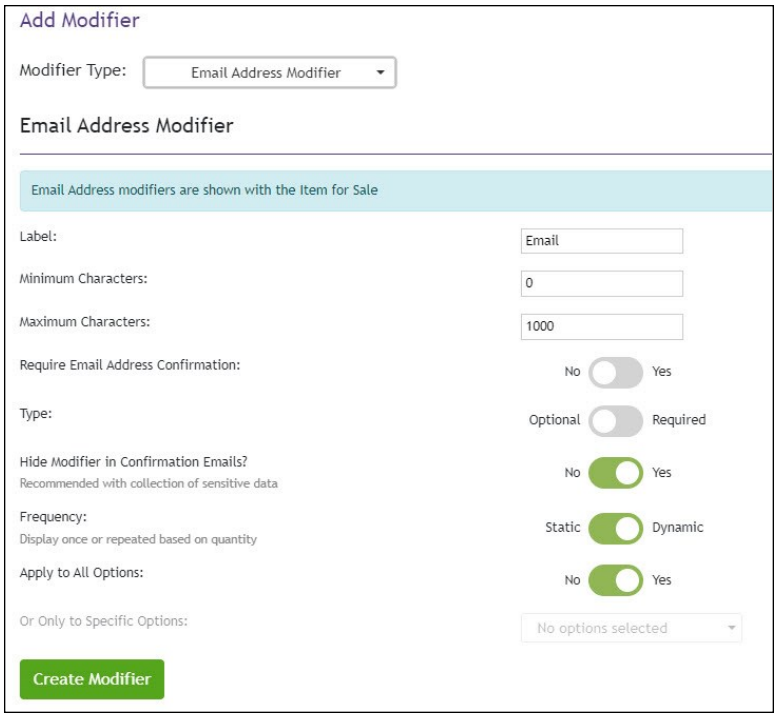
Phone Modifier: This modifier type allows the user to request a phone number. Price adjustments will not be allowed for this type of modifier.

Note: Phone modifiers used to be a validation type under the Text Entry Modifier. Phone modifiers are now their own type to increase visibility to this feature. In addition, phone modifiers are no longer limited to US and Canadian formats but will support any country's format.

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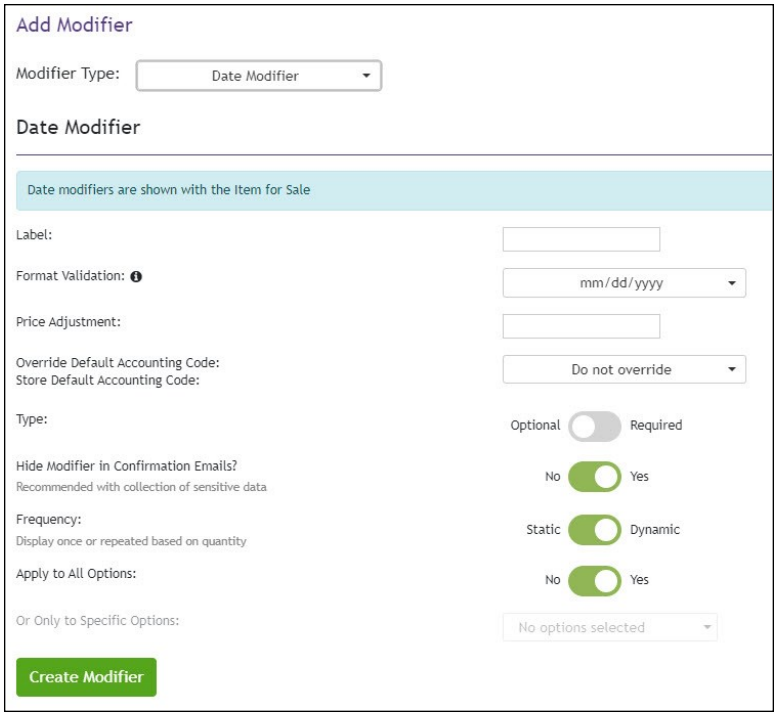


- **Email Modifier:** This modifier type allows the user to request an email address, plus confirmation if desired. Price adjustments will not be allowed for this type of modifier.
  Note: Email modifiers used to be a validation type under the Text Entry Modifier. Email modifiers are now their own type to increase visibility to this feature.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 355**.



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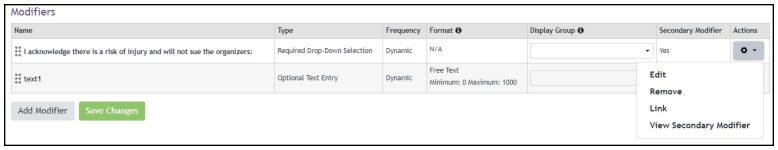
- **Date Modifier:** This modifier type allows the user to request a date and to specify its format. Price adjustments will not be allowed for this type of modifier.
  Note: Date modifiers used to be a validation type under the Text Entry Modifier. Date modifiers are now their own type to increase visibility to this feature.



Editing Modifiers

In the Manage Modifiers section, there are several types of edits that can be made:

- Using drag and drop to sort your modifiers: By placing your cursor over the  icon at the far left of the row you can drag and drop a row to sort the display order. Be sure to Save Changes before leaving the manage modifiers page.
- Applying a Table Display Group (see below)
- Editing a Modifier: The gear wheel on the right side of the table contains the Edit action. When clicked, the user will see the modifier details displayed for editing.



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- Linking a Modifier (See Linking Modifiers below)
- Unlinking a Modifier (See Linking Modifiers below)
- Removing (deleting) a Modifier: The gear wheel on the right side of the table contains the Remove action. When clicked, the modifier will be deleted.

Table Display Groups

Table display groups are used to group modifiers into a table format that displays horizontally across the page. Each table display group has a name assigned to it that will appear as a heading over the row of modifiers.

Note: Name and Address modifiers cannot be included in table group displays, as they are already a grouping of modifiers.

To create a table, click the drop-down select box in the Display Group column and then click into the text entry field. Add the table name that you would want to display in uStores and then click the + sign.



To assign a modifier to an existing table group, click the drop-down select box in the Display Group column and select the table name.



Be sure to Save Changes once table display groups have been assigned.

Note about sorting: Modifiers assigned to a table group will be sorted together automatically. Drag and drop can be used to change the sequence of the modifiers within that group. Modifiers that are not assigned to a table display group can appear before, after, or in between table display groups.

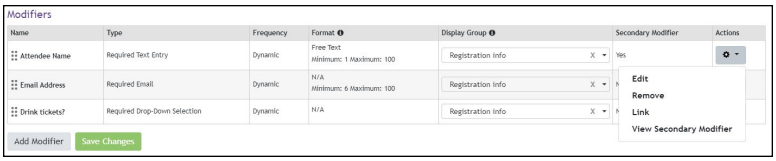
Linking Modifiers

The gear wheel on the right side of the table contains the Link action. When clicked, the link modifiers modal will display, which will allow a secondary modifier to be linked to the primary modifier the user is working with. When completed, the Secondary Modifier column will show Yes instead of No. The secondary modifier will not show on the Manage Modifiers page, instead the user will be able to click the gear wheel and see a View Secondary Modifier action.

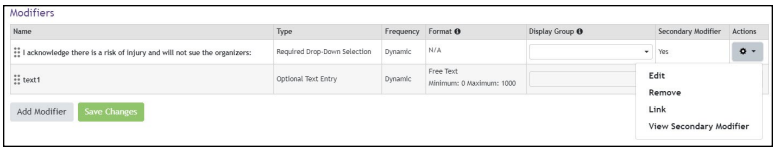
Name and Address modifiers cannot be linked. All other modifier types can be linked.

Note: If a secondary modifier has not been added, the "View Secondary Modifier" link in the gear wheel does not appear.

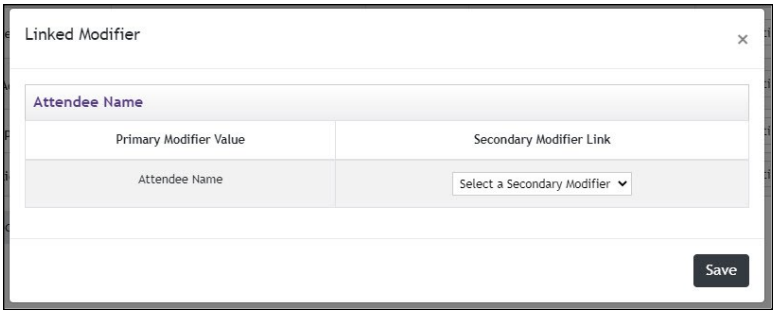
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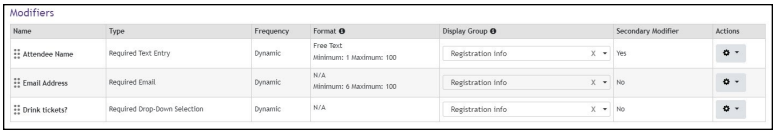
Link modifier action in gear wheel with secondary modifier added



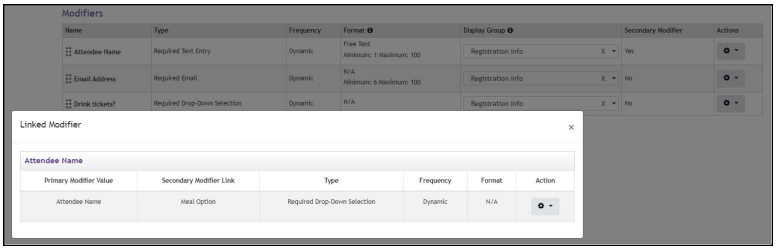
Link modifier action in gear wheel with no secondary modifier



Link Modal



Successful Linkage

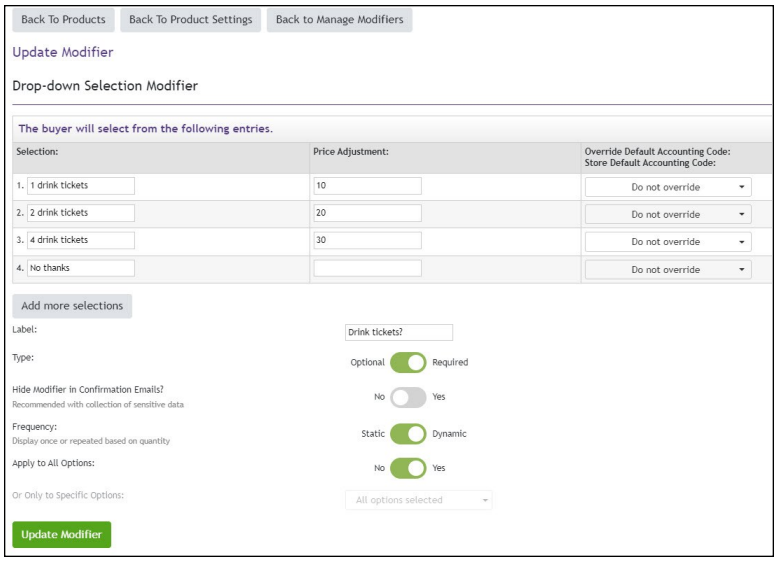


View Secondary Modifier Modal

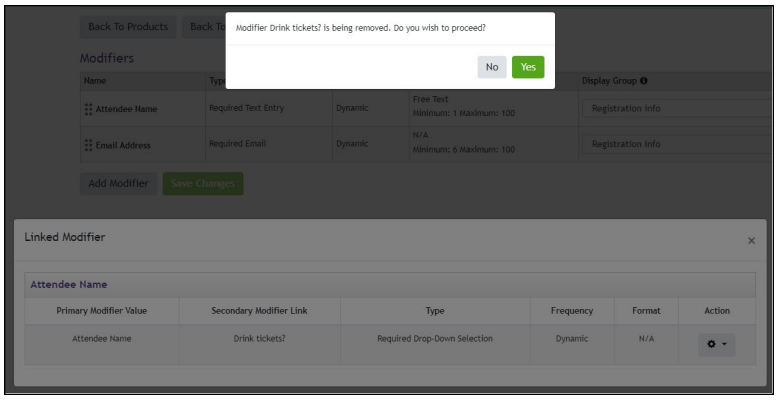
From the View Secondary Modifier display, a user will be able to:

- Edit the secondary modifier: Edit attributes of the secondary modifier

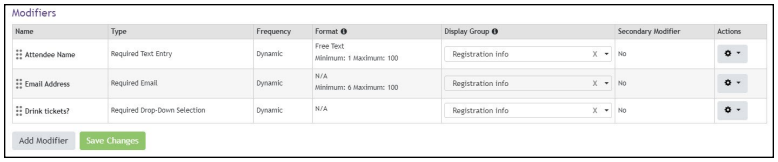
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- Remove the secondary modifier: Delete the secondary modifier



- Unlink the secondary modifier: Remove the primary-secondary modifier relationship. When this is completed the “secondary” modifier will become a “primary” modifier and will now show on the Manage Modifiers page.



Additionally, you can link more than one primary modifier dropdown select or multi-select response (value) to the same secondary modifier.

For example,

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Care package products can be purchased by parents for their students. When checking out the parent will designate where their student lives and what time range the package should be delivered within. Within the Marketplace Store the administrator will create two modifiers for the product:

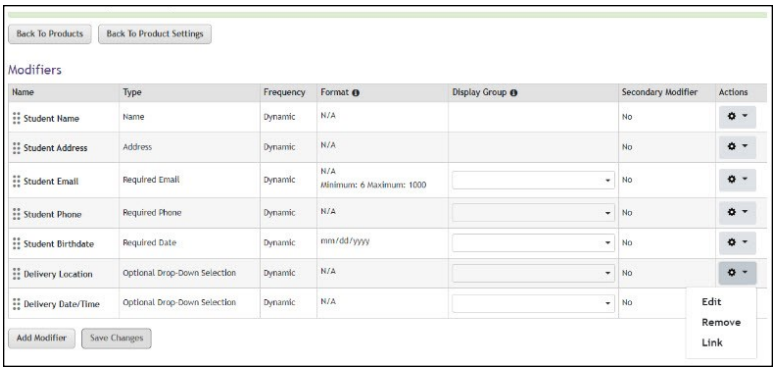
1. Delivery Location
2. Delivery Date/Time

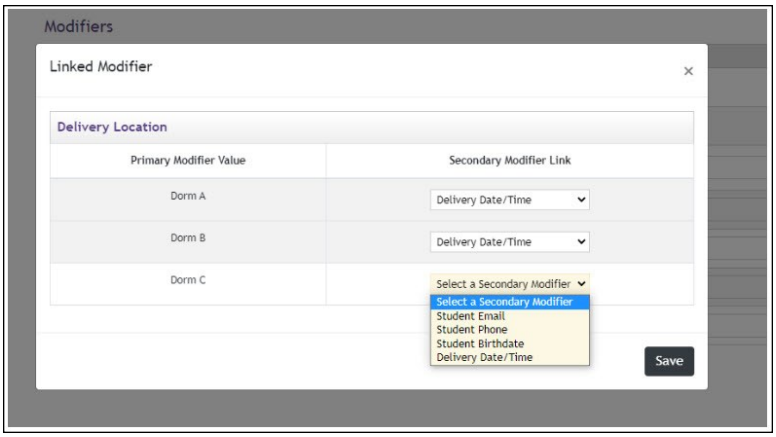
The Delivery Location modifier will be a Primary Modifier and will have values of:

1. Dorm A
2. Dorm B
3. Dorm C

The Delivery Date/Time modifier will be a Secondary Modifier associated with the Primary modifier (Delivery Location) responses (values) of Dorm A, Dorm B and Dorm C.

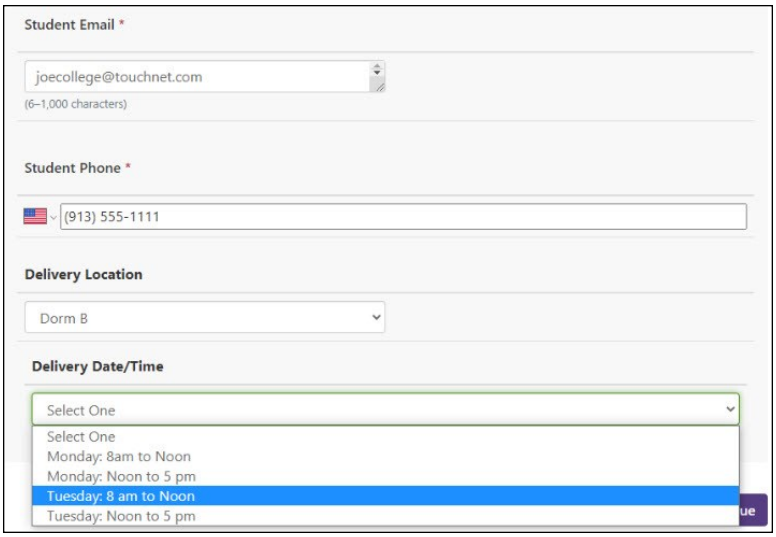
In the Marketplace Operations Center this will look like:



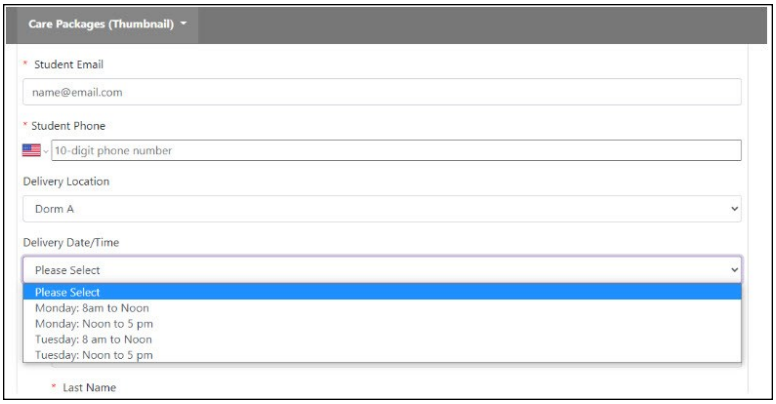


In uStores the shopper view will be:

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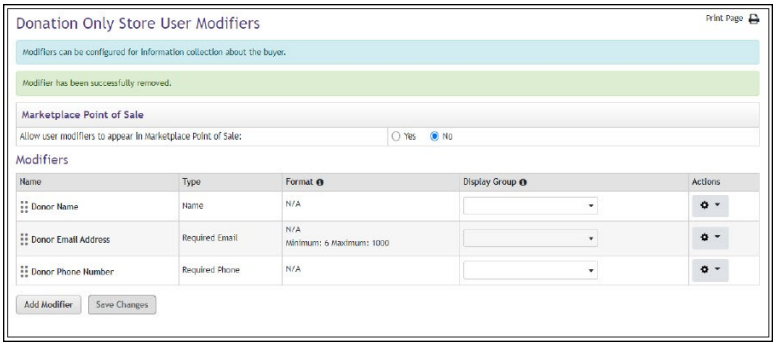


In MPOS the shopper view will be:



User Modifiers

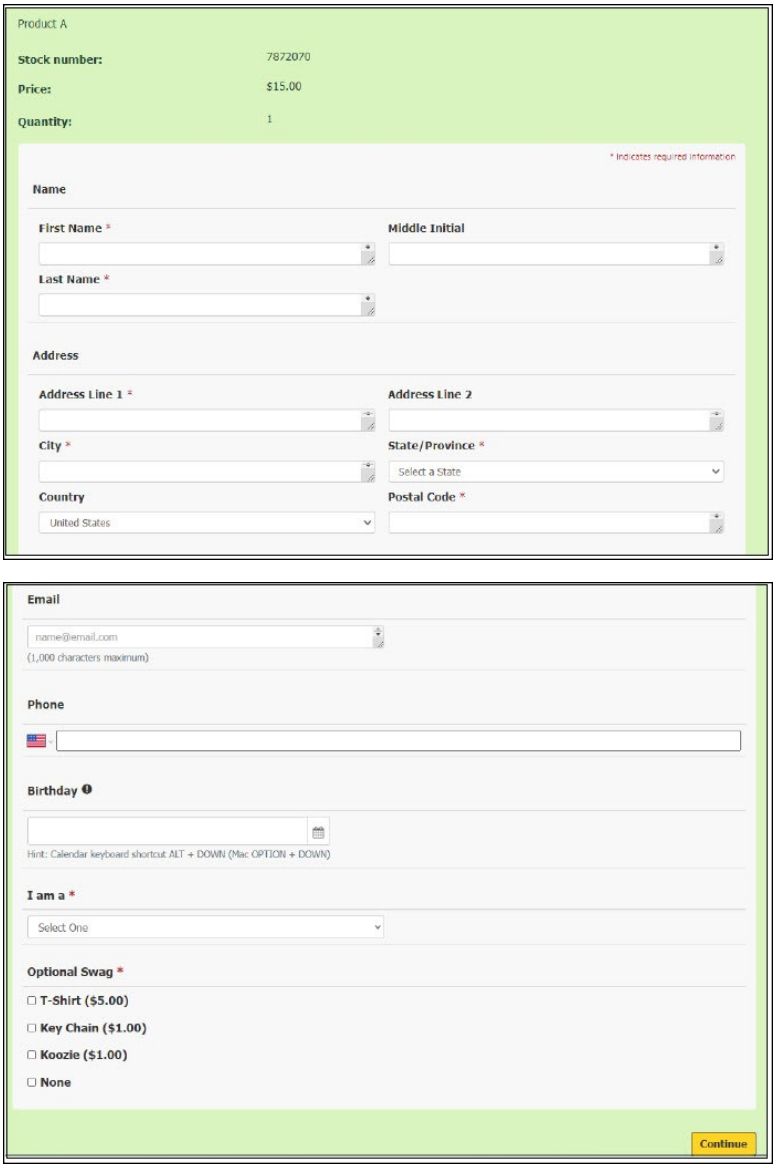
User Modifiers work in substantially the same manner as product modifiers. User Modifiers appear in the checkout workflow and are collected once per cart.



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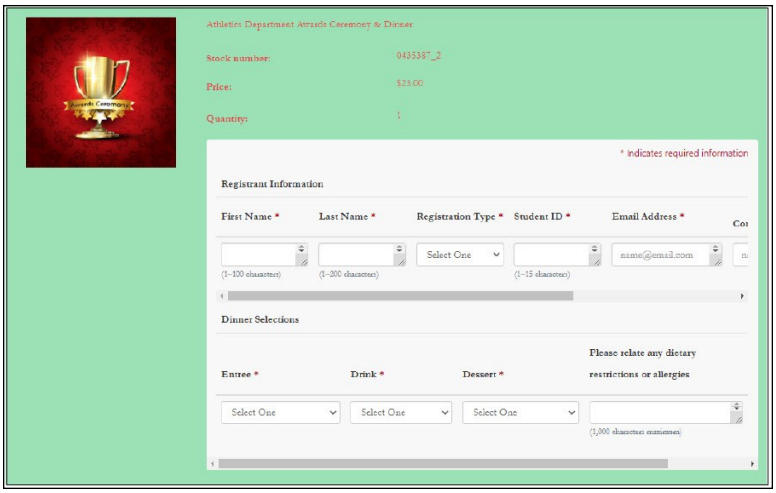
uStores Display

uStores will display product modifiers in either a standard, vertical format or the table display group horizontal format. Name and Address modifiers cannot be included in a table display group because they are already a grouping of sub-modifiers.

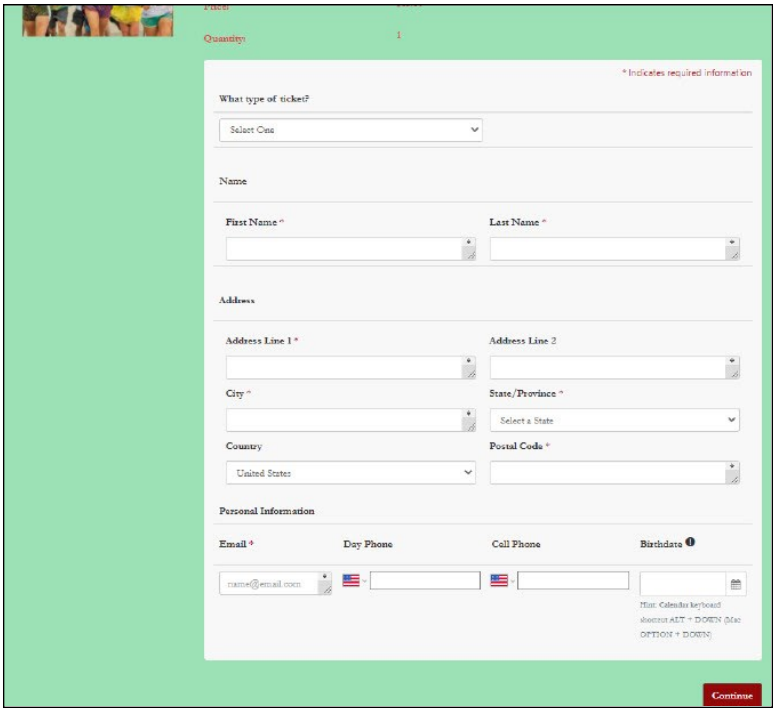


uStores product modifier display - standard, vertical format

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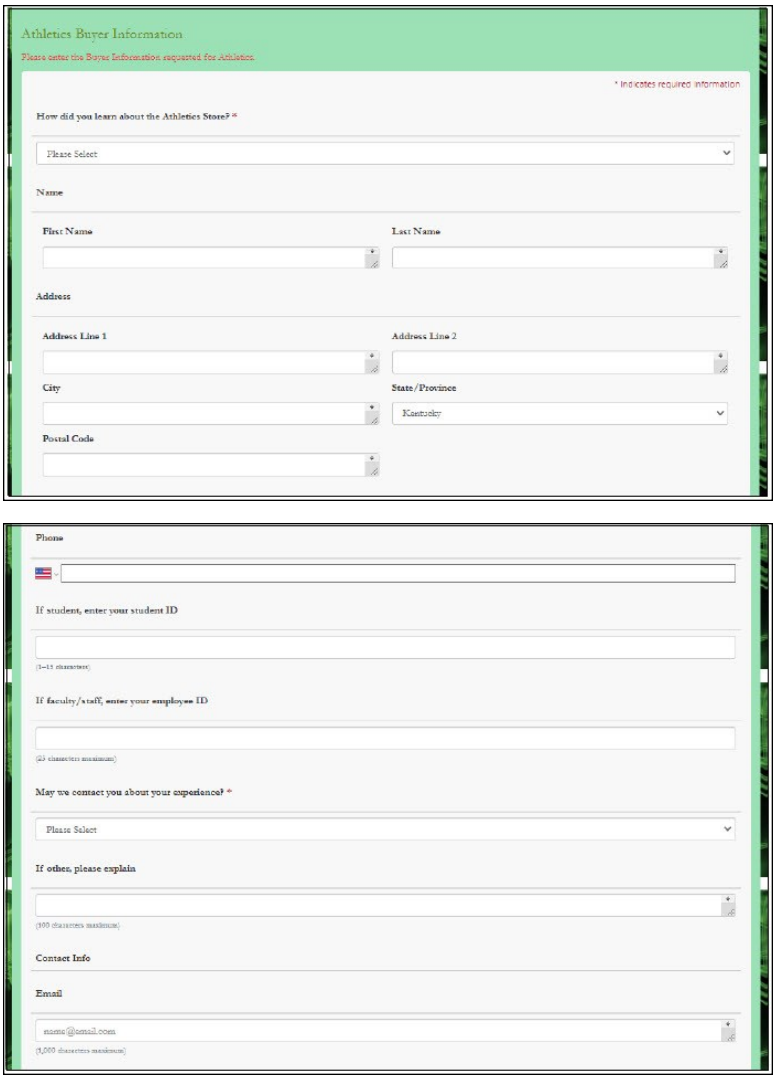


uStores product modifier table display group - horizontal layout

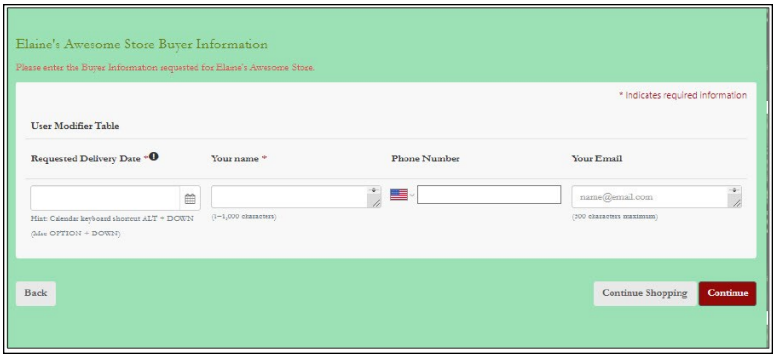


With name or address modifier types

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uStores buyer (aka user) modifiers - standard, vertical format

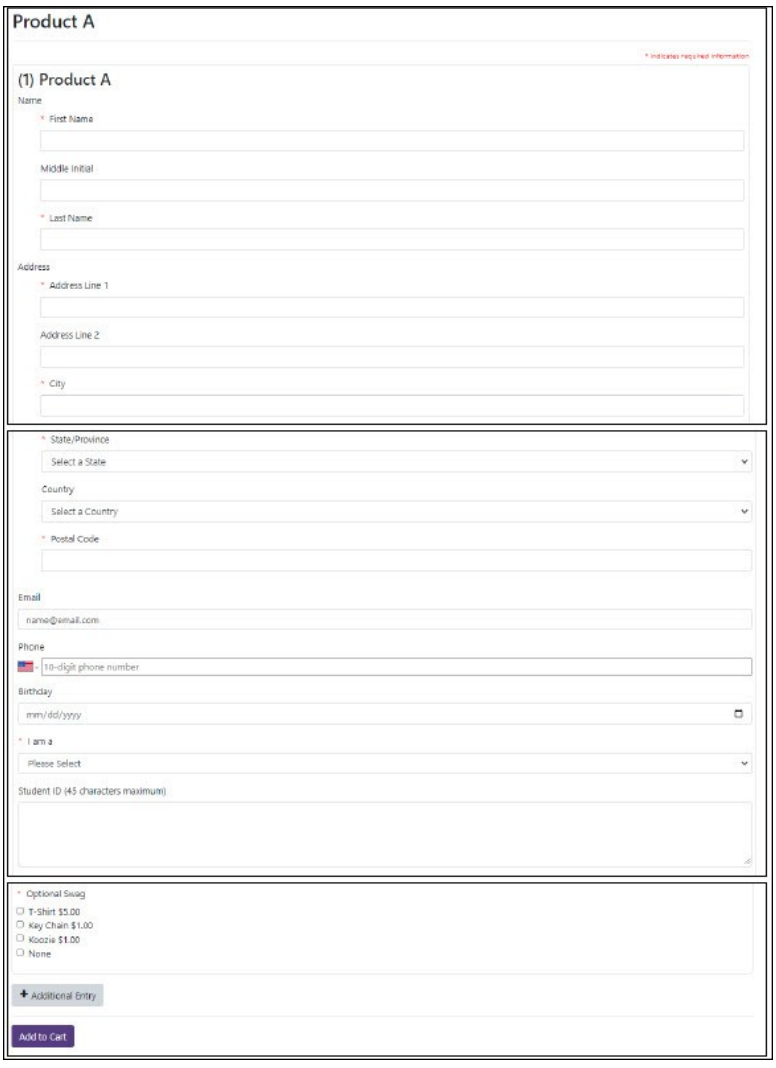


uStores buyer (aka user) modifiers table display group - horizontal format

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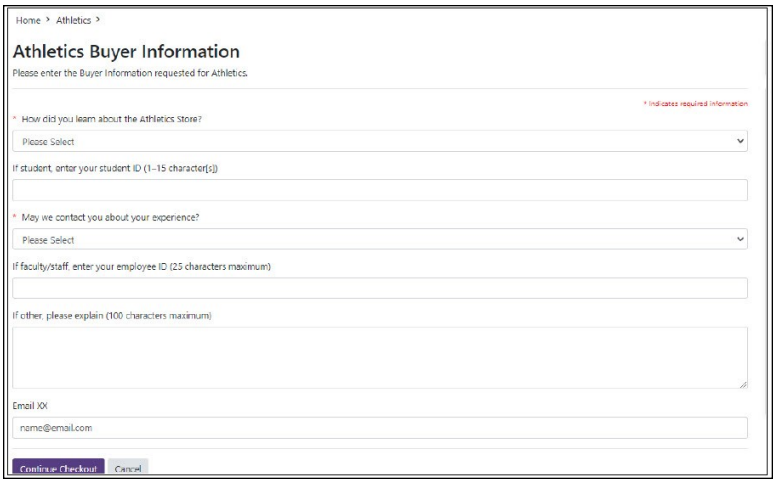
MPOS Display

MPOS will display product and user modifiers in a vertical column for entry. The Name and Address modifiers will be grouped together under the group label. If the product has a mix of static and dynamic modifiers, the static modifiers will be displayed first and then the dynamic modifiers for each quantity of the product being ordered.



MPOS Product Modifiers

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MPOS Buyer (User) Modifiers

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 377**.

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 377**.

   Note: uStores will display product modifiers in either a standard, vertical format or the table display group horizontal format. Name and Address modifiers cannot be included in a table display group because they are already a grouping of sub-modifiers. MPOS will display product and user modifiers in a vertical column for entry. The Name and Address modifiers will be grouped together under the group label. If the product has a mix of static and dynamic modifiers,

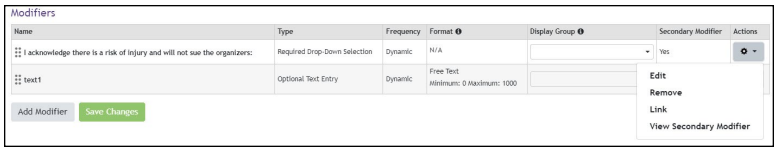
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the static modifiers will be displayed first and then the dynamic modifiers for each quantity of the product being ordered.

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.
3. In the General Settings section at the top of the page, click the "Manage Modifiers" link. The Manage Modifiers page appears.
4. Look for the modifier you would like to edit, and then click the gear icon in the Actions column of the corresponding modifier. Select the Edit option.



5. The Edit Product Modifier page appears.
6. Enter the modifier information and price adjustment(s), as described in **"Using the Add/Edit Product Modifier Pages" on page 377**. Then click the "Update Modifier" button.

Using the Add/Edit Product Modifier Pages

Several types of product modifier pages are available:

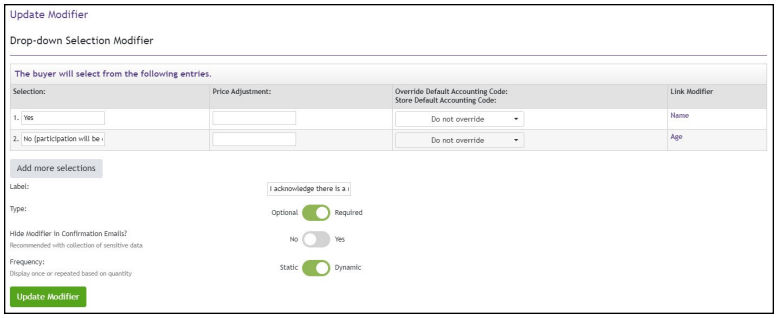
- Drop-down selection
- Text entry
- Multiple select
- Name
- Address
- Phone
- Email Address
- Date

With drop-down selection, text, or multiple select modifier types, you can associate a price adjustment. Price adjustments can be positive or negative.

When you add a product modifier, you select a modifier type (as described in **"Adding a Product Modifier" on page 376**) and then complete the fields on the corresponding modifier page. The following paragraphs describe how to complete these pages.

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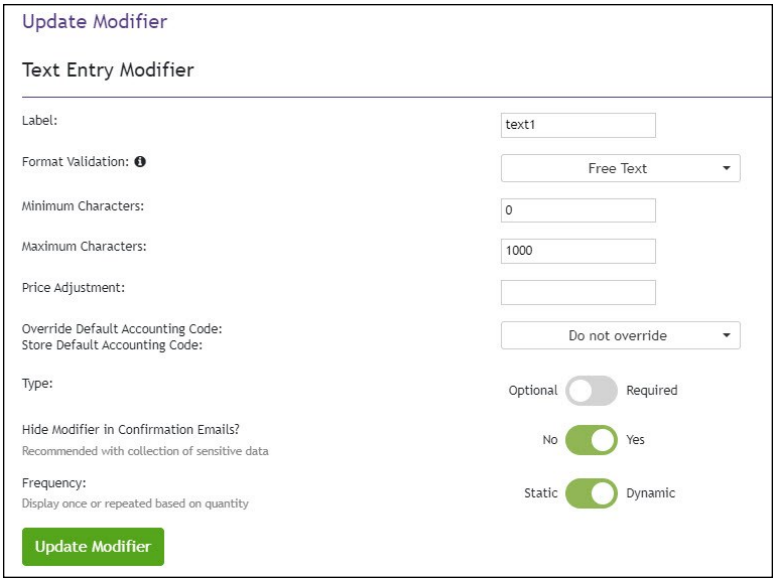
- **Drop-down Selection Modifier**—You must enter a name for the modifier and its selection values. For example, you might create a modifier with the name of "customer type" and the selections might be student, alumni, parent, staff, and other. You can enter price adjustments for each selection. You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



Note: The modifier fields for Price Adjustment and Override Accounting Code are not available for products in which the recurring payments option has been turned on.

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- **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, 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 385**.)



You can select an override accounting code, and you can 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.

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."

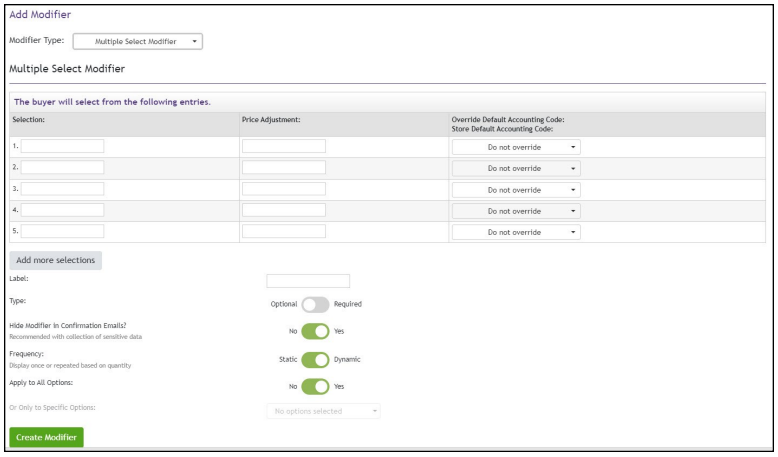
Multiple Selection Checkbox Modifier—You must enter a name for the modifier and any price adjustment. You can also have the modifier override the default accounting code, with several options to choose from. You can add more modifiers by clicking the Add more selections button. You can also add an label to the overall modifier.

You can select an override accounting code, and you can select whether the modifier should be static or dynamic. The customer will be asked for a static modifier just once, regardless of the quantity

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ordered, whereas the customer will be asked for a dynamic modifier multiple times, for each quantity ordered.

Note: The modifier fields for Price Adjustment and Override Accounting Code are not available for products in which the recurring payments option has been turned on.



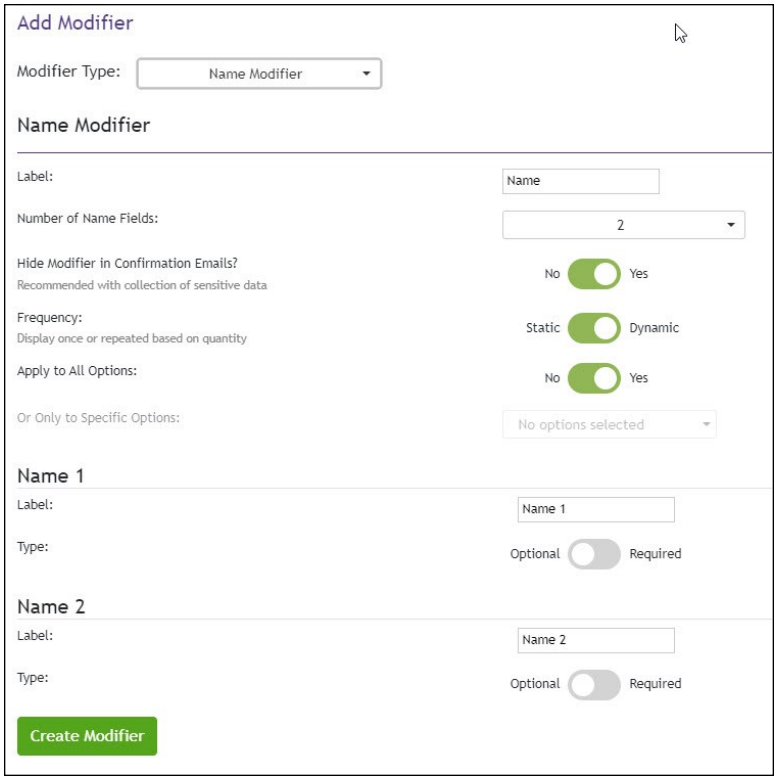
Name Modifier —You must enter a name for the modifier. You can choose the number of name fields. The default is two; if you need to adjust the number, choose the number from the text box.

You can select to hide the modifier in confirmation emails, and you can 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.

Note: Name modifiers do not allow for price adjustments. If a price adjustment is required for a name, please use a text modifier type.

Name modifiers are also not allowed to be assigned to display groups, as they already are grouped together for presentation.

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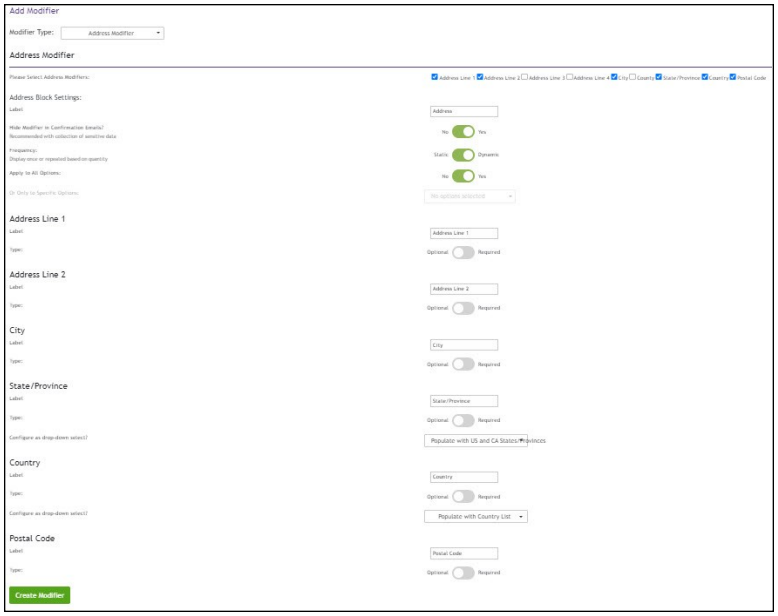
Address Modifier —Choose the address line modifiers at the top of the page. They will be listed at the bottom, where you can set each line as optional or required.

You can select to hide the modifier in confirmation emails, and you can 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.

Note: Address modifiers do not allow for price adjustments. If a price adjustment is required for an address, please use a text modifier type.

Address modifiers are also not allowed to be assigned to display groups, as they already are grouped together for presentation.

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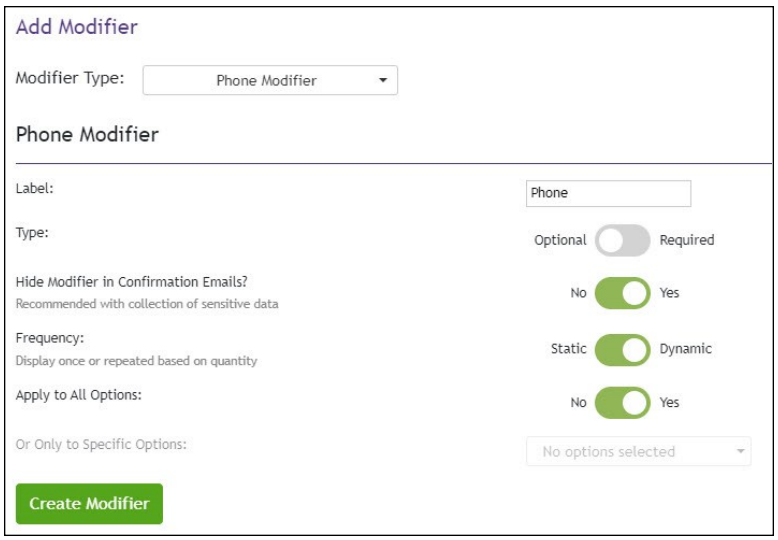


Phone Modifier —You can set the phone number modifier as optional or required.

You can select to hide the modifier in confirmation emails, and you can 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.

Note: Phone modifiers do not allow for price adjustments. If a price adjustment is required for a phone number, please use a text modifier type.

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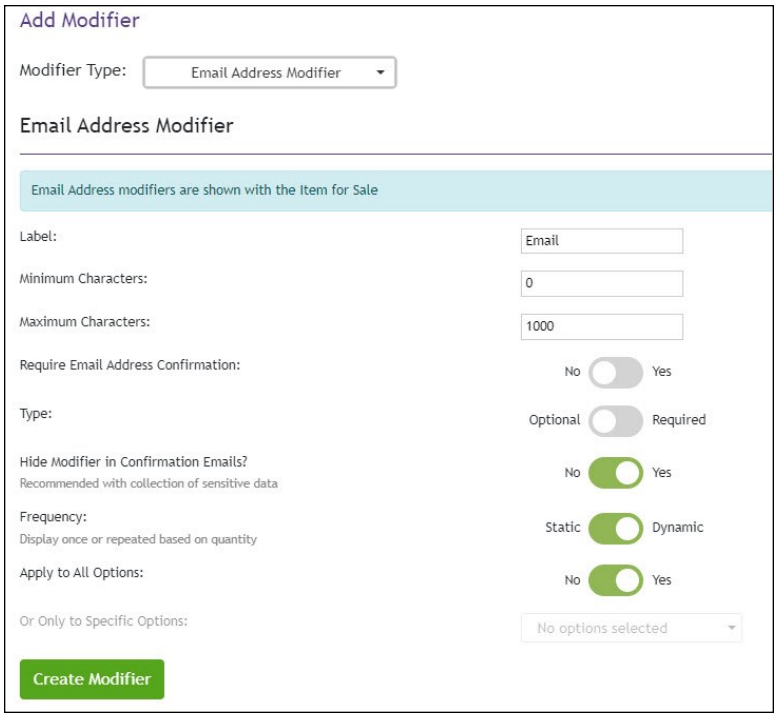
Email Address Modifier —You can create a label for the date modifier. You can set minimum and maximum character lengths. You can also choose if you want email address confirmation.

You can choose to make the email address optional or required.

You can select to hide the modifier in confirmation emails, and you can 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.

Note: Email address modifiers do not allow for price adjustments. If a price adjustment is required for an email address, please use a text modifier type.

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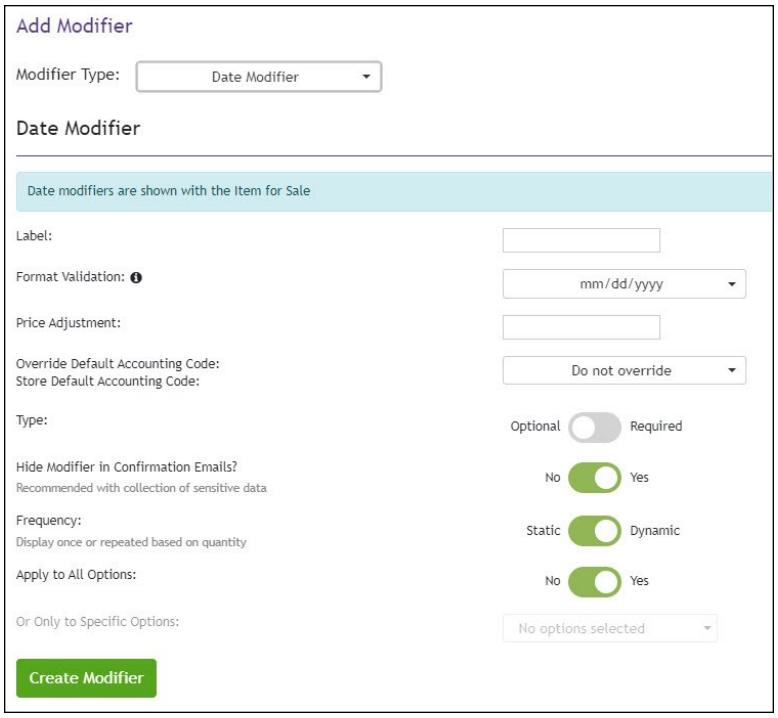


Date Modifier —You can create a label for the date modifier. You can also select the date format via the drop-down box. You can make a price adjustment as needed.

You can select an override accounting code, you can select to hide the modifier in confirmation email, and you can 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.

Note: Date modifiers do not allow for price adjustments. If a price adjustment is required for a date entry, please use a text modifier type.

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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	abcdedfghijklmnpqrstuvwxyz ABCDEFGHIJKLMNOPQRSTUVWXYZ
Alpha Extended	abcdedfghijklmnpqrstuvwxyz ABCDEFGHIJKLMNOPQRSTUVWXYZ -().,& [space] ' [single quote]
Alphanumeric	abcdedfghijklmnpqrstuvwxyz ABCDEFGHIJKLMNOPQRSTUVWXYZ 0123456789

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Validation Format	Definition/Characters Allowed
Alphanumeric Extended	abcdedfghijklmnpqrstuvwxyz 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 Display Groups

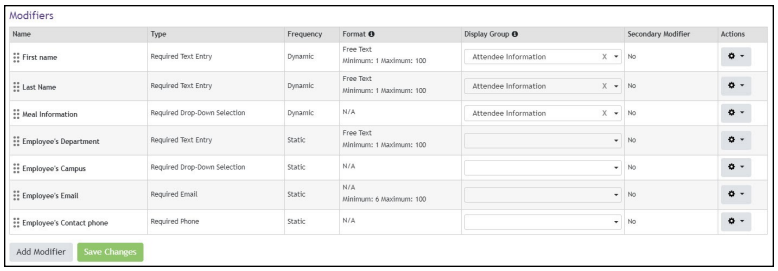
Follow these steps to associate modifiers using Display Groups.

Note: Name and address modifiers cannot be put into display groups.

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.

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3 In the General Settings section at the top of the page, click the "Manage Modifiers" link. The Manage Modifiers page appears.

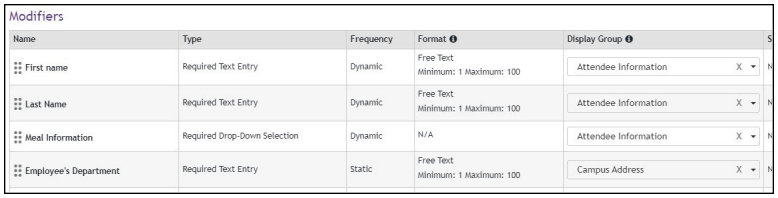


Note: Before you can use Display Groups, modifiers must have already been configured for the product. If modifiers have not yet been created, see **"Adding a Product Modifier" on page 376**.

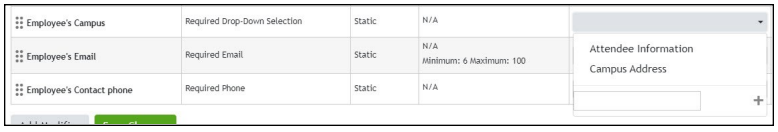
4 The Display Group column lists display groups associated with the specific modifier. From the Display Group dropdown list, select a group to include in the table. If the display group you want isn't not part of the list, you can add it by typing the name directly into the group field box and clicking the add (+) button.



The display group that you selected or added will now appear in the Table Information section.



All display groups that you have created are included in the Display Group dropdown list.



5 Repeat for all additional modifiers that you would like to associate with a display group in the table.

Note: You can remove a display group from the table by clicking the X button next to the display group name.

6 Click the Save Changes button.

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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."

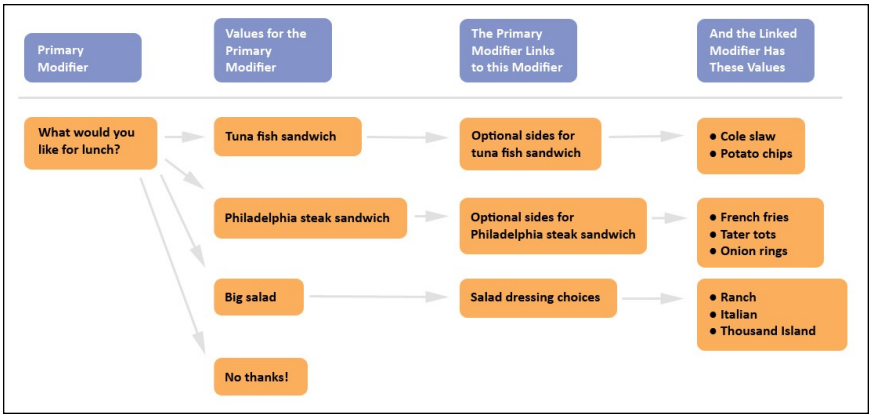
You can link to a different modifier depending on the customer's response. For example, a modifier for a day-long seminar might have this question: "What would you like for lunch?" And this modifier would then provide customers with a drop down list with the following selections: tuna fish sandwich, 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.

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:

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1. Create a modifier named "What would you like for lunch?"
2. Give the following values to the modifier: Tuna fish sandwich, Philadelphia steak sandwich, Big salad, and No thanks!
3. Create a modifier named "Optional sides for tuna fish sandwich".
4. Give the modifier 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.

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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 388**. 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 376**.

The gear wheel on the right side of the table contains the Link action. When clicked, the link modifiers modal will display, which will allow a secondary modifier to be linked to the primary modifier the user is working with.

When completed, the Secondary Modifier column will show Yes instead of No. The secondary modifier will not show on the Manage Modifiers page, instead the user will be able to click the gear wheel and see a View Secondary Modifier action.

From the View Secondary Modifier display a user will be able to:

- Edit the secondary modifier: edit attributes of the secondary modifier
- Remove the secondary modifier : delete the secondary modifier
- Unlink the secondary modifier: remove the primary-secondary modifier relationship. When this is completed the “secondary” modifier will become a “primary” modifier and will now show on the Manage Modifiers page.

Name and Address modifiers cannot be linked. All other modifier types can be linked.

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.
5. 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.
6. Repeat Step 5 for all values for the primary modifier.

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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.

7 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 Order column (because the linked modifiers will be displayed to shoppers in the order of the primary modifier section values.)

8 (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.

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.

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.

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4 Scroll down to the "Modifiers" section. This section lists all the modifiers that have been added to the product.

5 For the modifier that you need to delete, click the Remove text link in the Actions column. The Delete Product Modifier page appears.

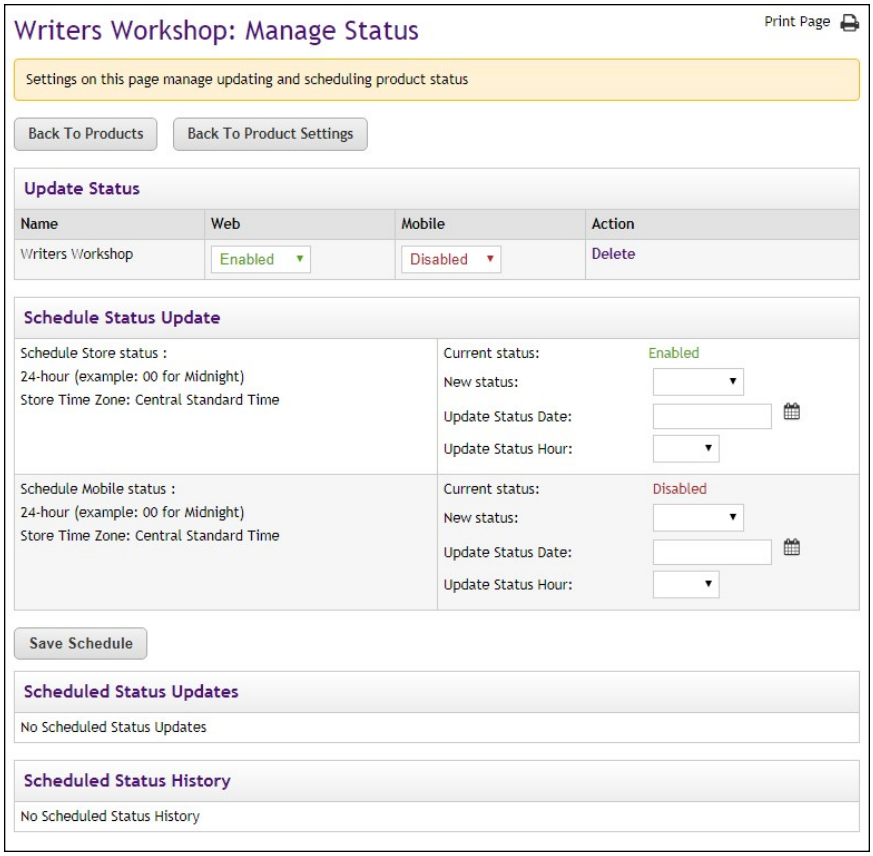
6 You will need to specify how the modifier should be removed. You can choose to remove the modifier from all the "Items for Sale" by selecting the "Remove From All" button button. Or you can remove the modifiers from selected "Items for Sale": CTRL click all applicable "Items for Sale" displayed in the list box and then click the "Remove From Selected" button.

5.8 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 306**). Then select the "Manage status" link in the "Ustore status" section. The Product Status Management page then opens.

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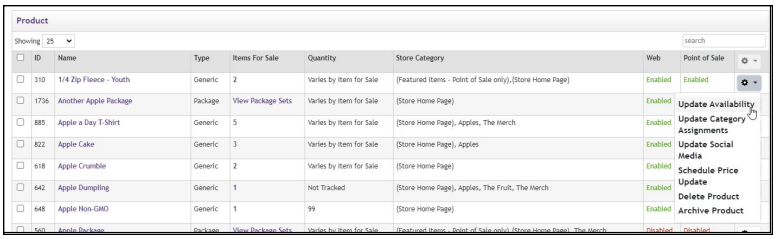
The Product Status Management page allows you to schedule status changes.

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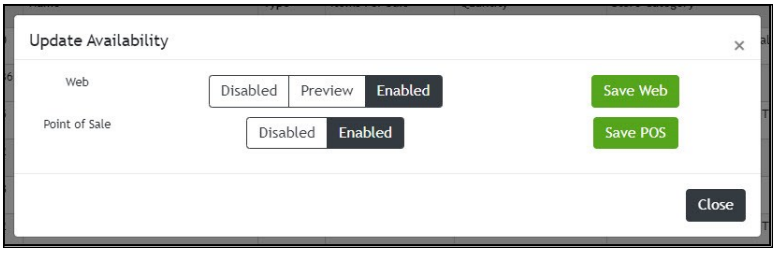
Updating the Current Product Status

You can update the current status of a product two different ways.

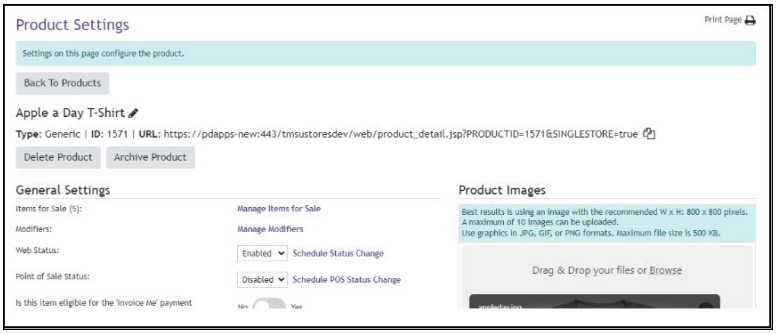
You can go to the product page, click on the gearwheel and choose "Update Availability".



A popup screen appears where you can change the status for the web and/or point of sale option.

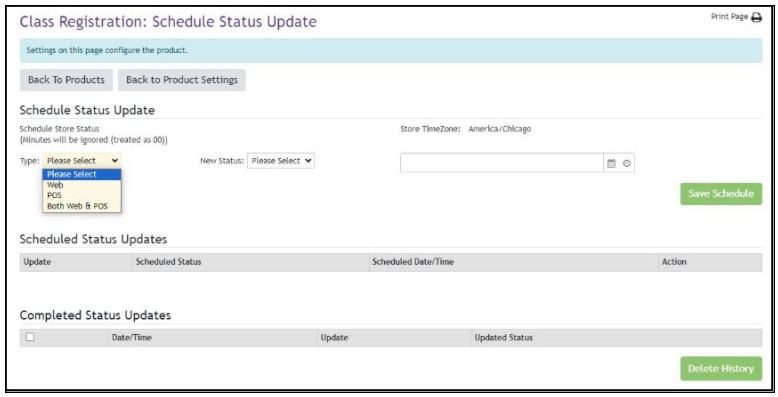


You can also access the view by clicking on "Schedule Status Change" or "Schedule POS Status Change" from the specific product settings page.



Clicking either link will take you to the same Schedule Status Update screen.

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The following states are available for status type:

- **Web**—The product is available for shoppers via the Web only.
- **POS**—The product is available for shoppers via a point-of-sale station only.
- **Both Web and POS**—The product is available for shoppers either via the Web or a point-of sale station.

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. **Note:** Preview mode is not available in the Schedule Status Update screen.

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.

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After you have changed the status of a product to Preview, you can view the product by navigating to the Product Settings page:

Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products.

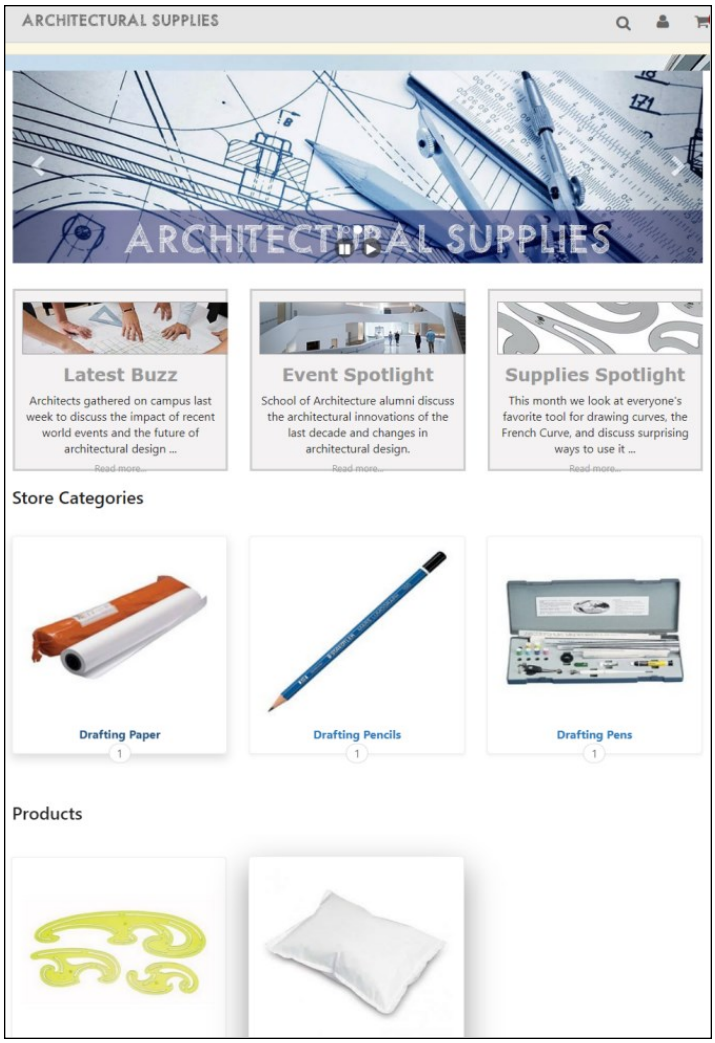
And then select the product you would like to preview.

When the Product Settings page appears, look for the Web status field.



For products in preview mode, a "View" link appears in the Web status section of the Product Settings page.

If a product is in preview mode, the word Preview appears and a link named View. When you select the View link, a new browser window is opened that displays the product.



Preview mode allows you to see what shoppers will see.

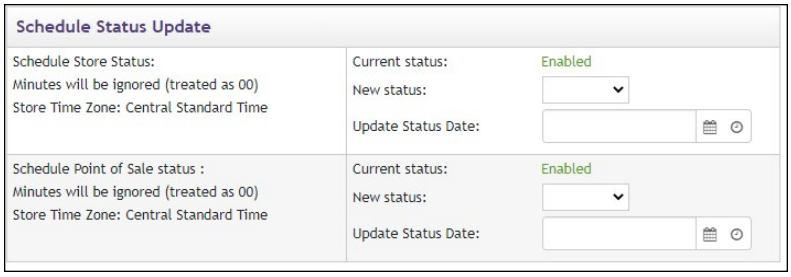
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An orange status bar indicates that the store is being displayed in preview mode. You can navigate to categories and products within the store. You can leave preview mode by selecting the Exit Preview Mode button.

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.

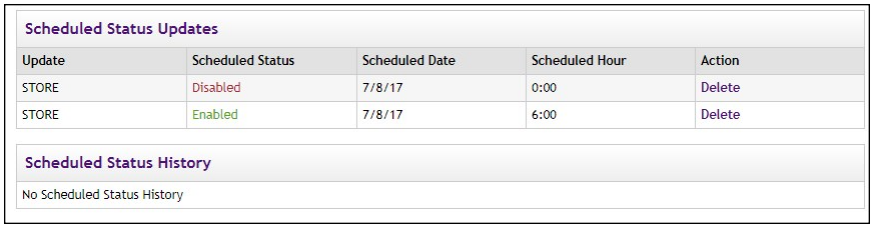


You can schedule a status change by using the Product Status Management page.

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 394**.
2. Click the calendar icon in the "Update Status Date" field and select the desired date from the calendar widget. If you enter a date, you must use this format: mm/dd/yy. For example, enter June 29, 2020 as 06/29/20.
3. Click the clock icon to select the desired time from the dropdown list.
4. Choose the Save Schedule button.

Once a status update has been scheduled, it appears in the Schedule Status Updates table.



Scheduled status updates appear in this table.

You can remove a scheduled status update by selecting the Delete History link.

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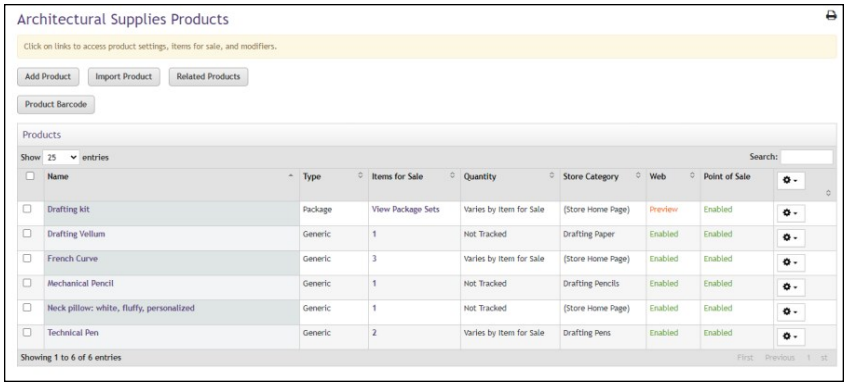
5.9 Adding a Package

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.

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.

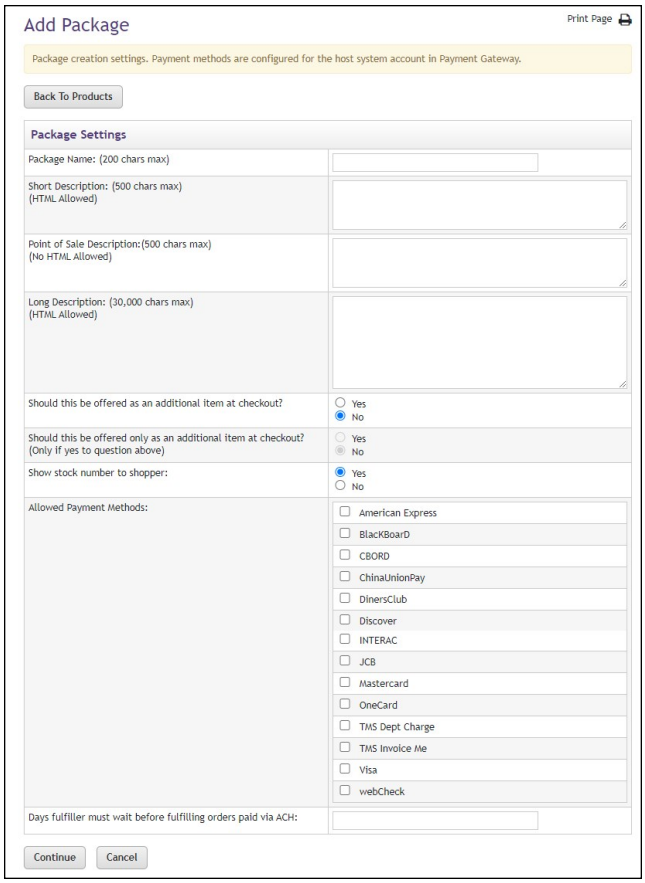


2. Select each product (by selecting the corresponding checkboxes in the far left column), or to select all the products in the list, click the checkbox at the top of the Show column and then choose Create Package from the Gear flyout in the column heading.

   The first page of the Add Package process appears.

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Add Package: Package Settings



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.

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- **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

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the checkout process has been initiated and the shopper has at least one item from this store in their cart.

3 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 232**.

These payment methods override 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 new set of payment methods can be chosen to apply to the package. In this case, the package might use Discover Card, Visa, and ACH.

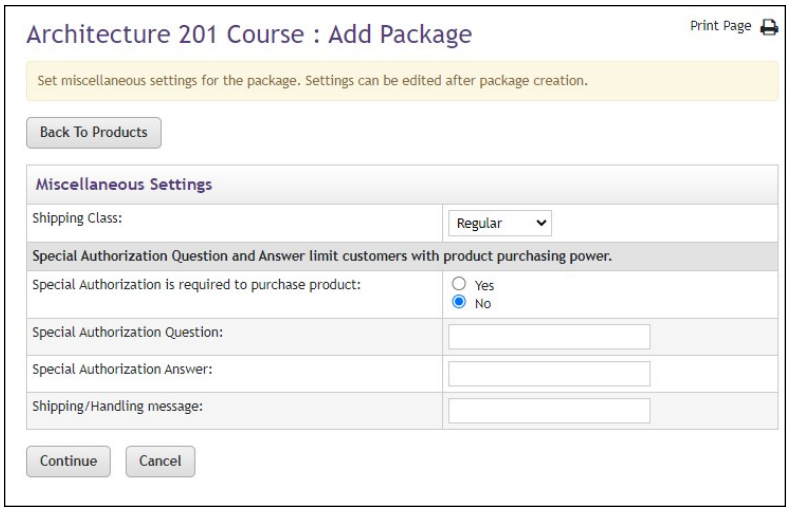
Important! If you do not choose any payment methods, the package will not be displayed to shoppers. For the package to be displayed, you must choose at least one payment method.

4 Enter the number of days to wait before fulfilling an order paid for using the ACH payment method. This ACH waiting period for the package overrides the ACH wait period configured for each product.

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.

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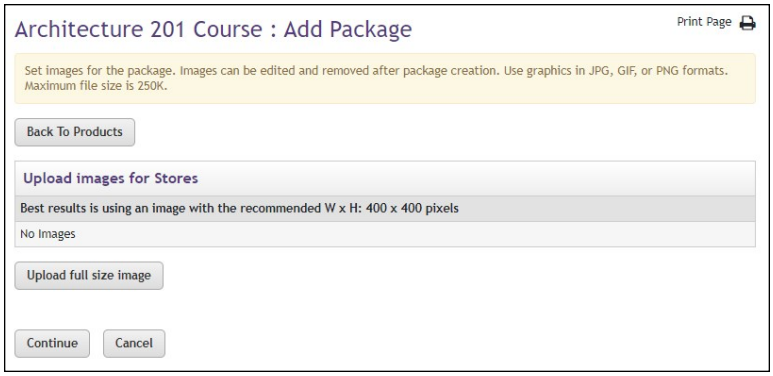
- **Shipping Class**—Choose a shipping class that contains delivery methods appropriate for the package. This shipping class for the package overrides the shipping class configured for each product. If the package contains products that do not require delivery, see**"Shipping Classes When Delivery is Not Required" on page 288** for more information about setting up a shipping class. For more information about shipping classes, see **"Shipping Classes" on page 236**.
- **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. The special authorization option for the package overrides the special authorization for each product.

  Note: If you would like buyers to be authenticated before they purchase this product, you should establish a user group. For more information, see **"User Groups and User Authentication" on page 110**.

- **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. This message overrides the shipping/handling message configured for each product.

2 Click the Continue button. The Upload Images page appears.

Add Package: Images



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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:

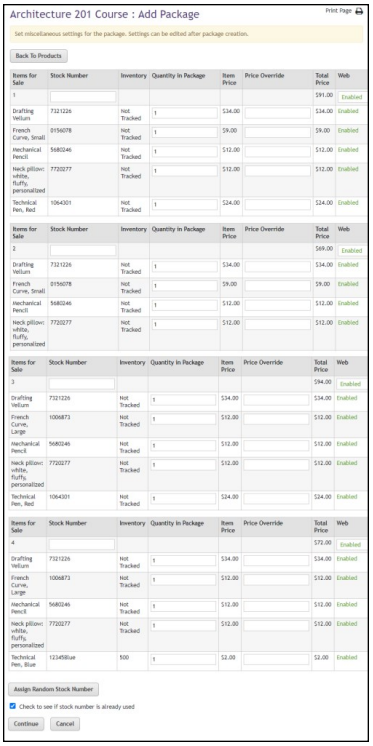
- You can only use GIF, JPG, or PNG format images.
- Full size package images are best displayed at 400 pixels wide by 400 pixels high.
- All images must have file sizes of 250K or less.

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



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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. Price overrides are typically used for offering discounts from the regular product prices. 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, you can enter a different price override for each shirt size.

  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

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continue to be used, regardless of whether it is lower or higher than the new product price.

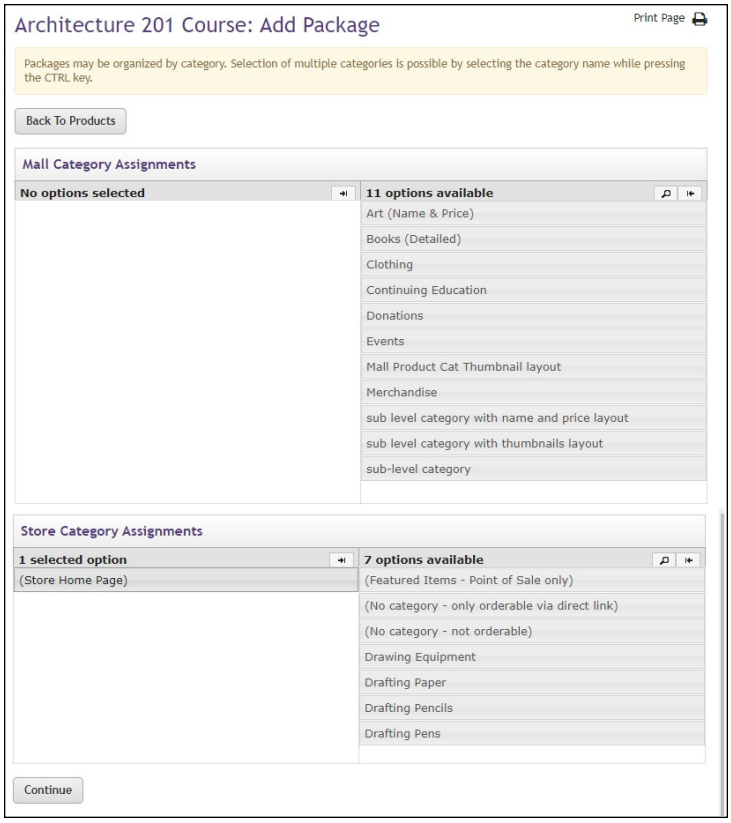
2 Use the Enable fields:

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.

The enable/disable fields for the package are separate from the enable/disable fields for the product. For example, a product might be disabled for individual sale, but it can still be added to a package and enabled for sale.

3 Click the Confirm button. The Status page next appears.

Add Package: Status



1 Choose from the enable options:

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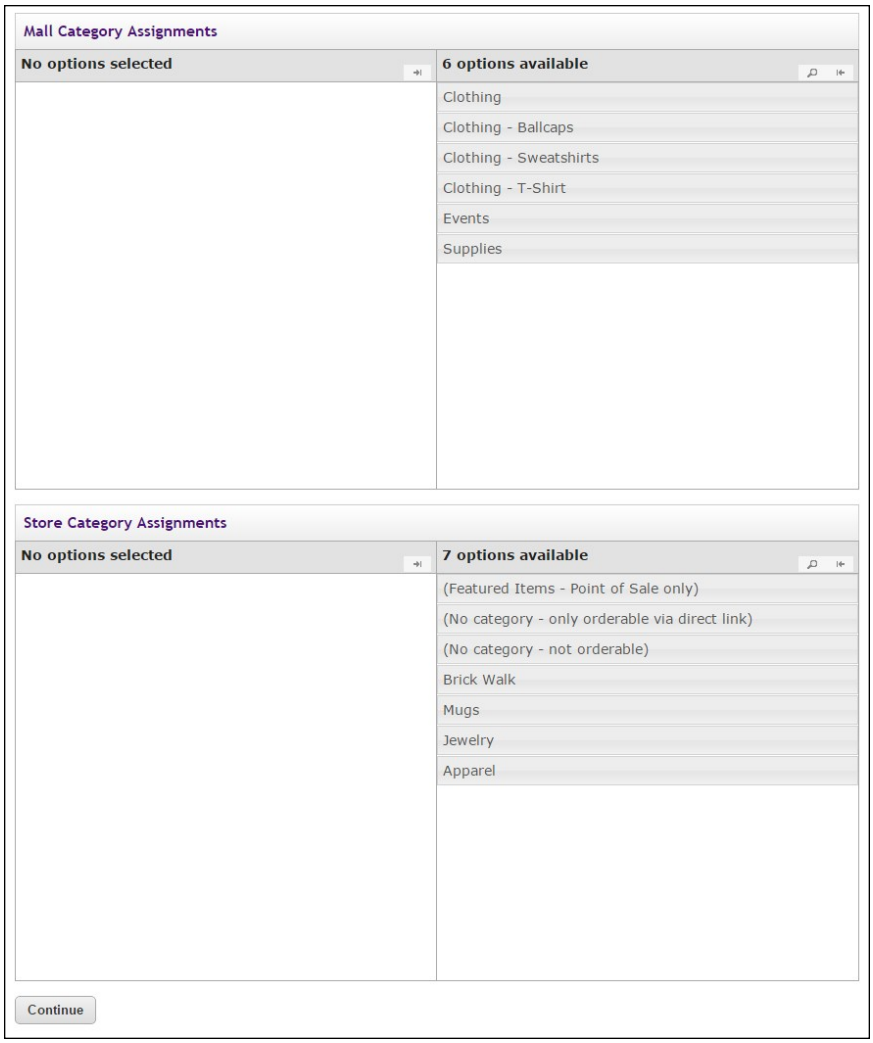
- **Enabled**—If you choose this option, the package will be immediately available to buyers once you click the Confirm button.
- **Disabled**—If you choose this option the package will not be available to shoppers until you later enable it.
- **Schedule Status**—If you choose the Schedule Status button, 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 152**.

2 Click the Confirm button. Your package has been successfully added to your store! The Category page next appears.

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Add Package: Categories



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 45**) and store categories (for more information, see **"Store Product Categories" on page 241**). 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.

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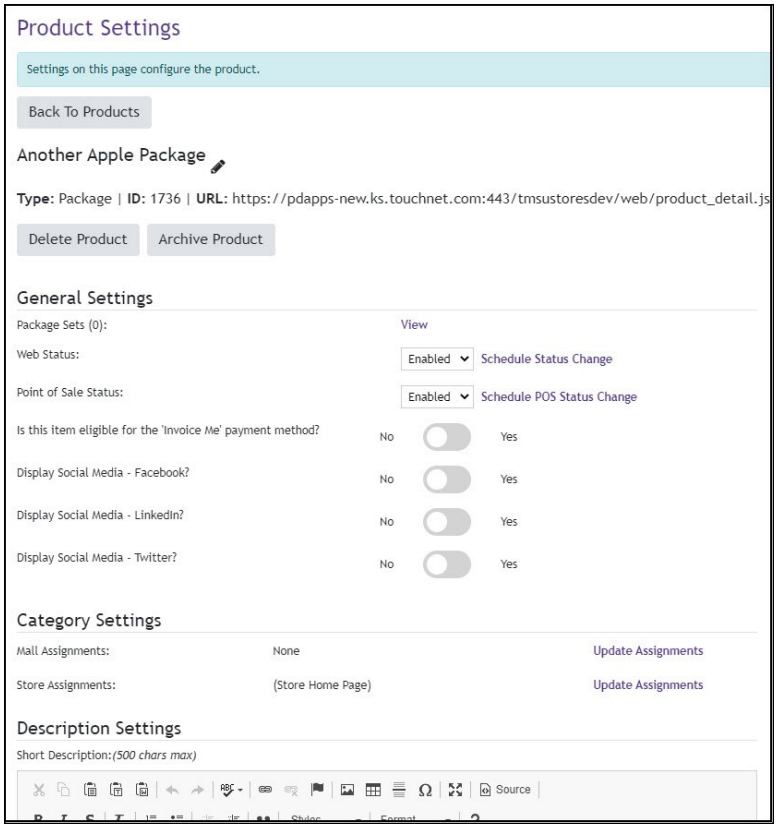
Editing a Package

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 the Product Settings page. All the fields are described below in the "Field descriptions" section.



The top portion of the Package Settings page.

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Field descriptions:

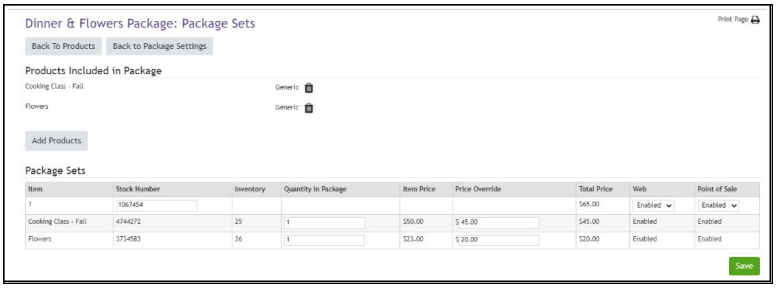
General Settings

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

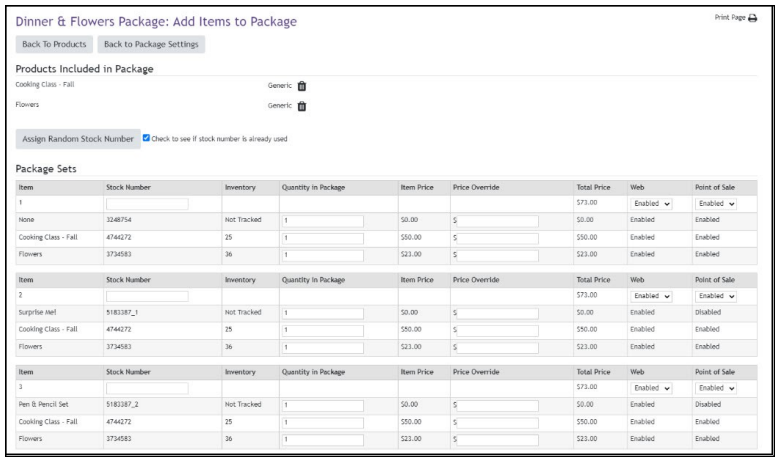
If "options" such as size or color were established for any of the products in the package, then the package is available as multiple package sets. You can use the View link to view the Package Sets page. This is a new look for feature pack 8.7.



The Package Sets page lists the products in the package and the Items for Sale.

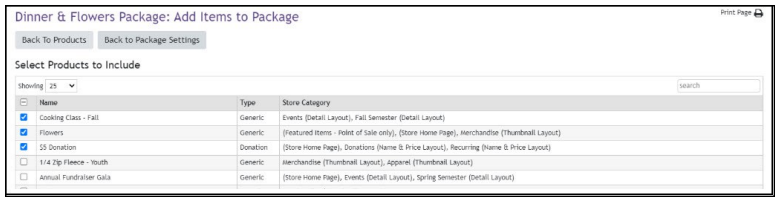
On the Package Sets page you can change some of the package configuration settings, such as Price Overrides and availability status (Enabled or Disabled). You can also Delete products from a package (click the Delete link in the Products Included in Package section), as well as add additional products to a package (click the Add Products button below the Products Included in Package section). This is also a new look for feature pack 8.7.

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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 392**.

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

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in the Actions column. The Manage Category Assignments page the 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 assiging your package to mulitple mall categories, see **"Mall Product Categories" on page 45**), and for more information about assigning your package to multiple store categories, see **"Store Product Categories" on page 241**)

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

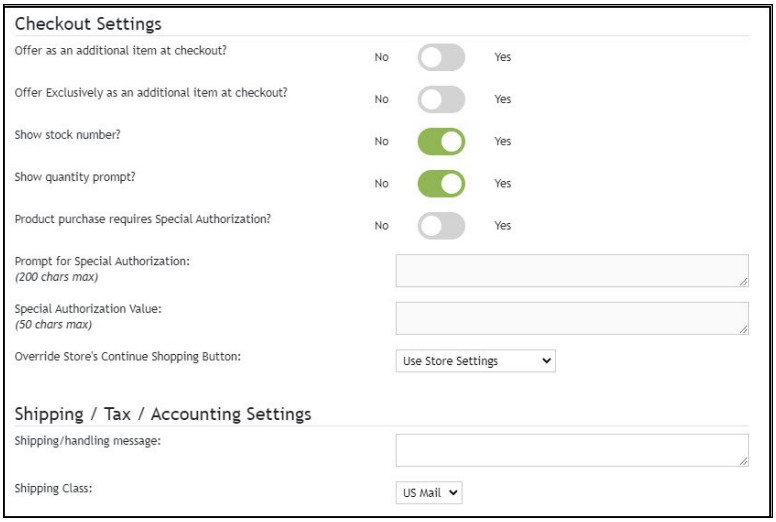
Shoppers see this description when they go to a product detail page. Price and options (such as size and color) appear below the description on the product detail page. You may want to use the long description to provide shoppers with additional information about the available options. If the package 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

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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.



The Checkout and Shipping/Tax/Accounting Settings.

Checkout Options

Offer 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.

Offer Exclusively 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.

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Show stock number?
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?
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.

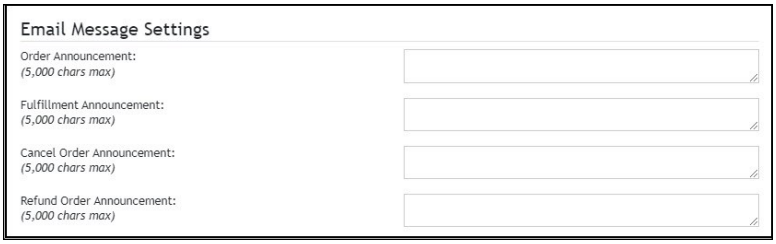
You should keep in mind that anyone who gets the answer can then purchase the package. For example, you might use the "Special Authorization" field in conjunction with a flier distributed on campus. The flier would describe the package and provide the answer for the "Prompt for Special Authorization. " 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 **"User Groups and User Authentication" on page 110**.

Override Store's Continue Shopping Button
You can choose to navigate the shopper to different sections of the store by selecting one of the options in this dropdown field. The options are Use Store Settings, Use Default Settings, Navigate to Store Page, and Navigate to Product Page.

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.

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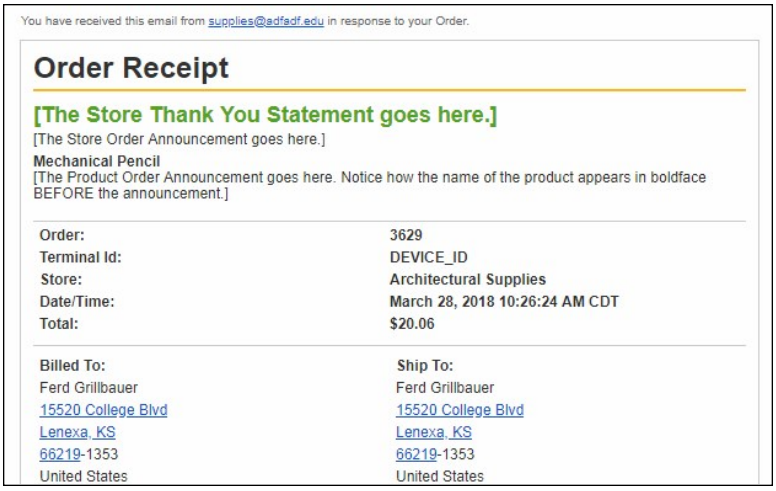
The Email Message section of the Package Settings page.

Email Messages

The following fields will appear on e-mail messages that are automatically sent to customers when orders are received, fulfilled, cancelled, and refunded. These announcements are package specific and are in addition to any announcements that are configured in the store settings.

Order Announcement

The Order Announcement appears on e-mail messages generated to customers after orders have been placed for this package. Use this announcement field to enter a paragraph that provides customers with relevant information about the package they have ordered. Characters entered in this field will appear as text in e-mail messages. (5,000 characters max.)



A sample Order Receipt with store order announcements AND product order announcements.

Fulfillment Announcement

The 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 with relevant information about the fulfillment of the package that they ordered. Characters entered in this field will appear as text in e-mail messages. (5,000 characters max.)

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Cancel Order Announcement

The 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 payment card number is incorrect, because the customer's payment card has expired, etc.). Use this announcement field to enter a paragraph that provides the customer with relevant information about the package that was ordered. Characters entered in this field will appear as text in e-mail messages. (5,000 characters max.)

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 provides the customer witth relevant information about the package order that was refunded. Characters entered in this field will appear as text in e-mail messages. (5,000 characters max.)

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 334**.

5.10 QR Code Management for Products

The QR Code Management section appears in the right-hand column of the Product Settings page, underneath the product image(s). This section allows you to generate a QR code that can be downloaded for use on printed material. The QR code represents the URL for a product details page. The QR code can be used in printed material, such as a magazine or a sign or product packaging or a business card or almost any object about which users might need information. The main use of QR codes comes in smart phone applications that use a camera to photograph the QR code. The application interprets the QR code and links to the targeted web page by opening a web browser installed on the smart phone.

Note: The QR Code Management section of the Product Settings page only appears if Mobile Marketplace has been licensed.

To generate and download a QR code, follow these instructions:

1. In the left navigation menu, go to Marketplace Home > [Merchant] > [Stores] > [Store Name] > Store Settings > Products. The Store Products page appears.
2. Click a product name in the Name column.

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The Product Settings page appears for that product.

3 Scroll so that the QR Code Management section is visible.



4 Choose Small, Medium, or Large from the Code Size dropdown menu.

- Small—Size: 250 pixels wide by 250 pixels high.
- Medium—Size: 350 pixels wide by 350 pixels high.
- Large—Size: 550 pixels wide by 550 pixels high.

5 Choose png, pdf, jpeg, gif, or bmp from the File Type dropdown menu.

6 Choose the Download Image button.

The QR Code image then appears in the Image box.

Note: The URL associated with the QR Code appears in the Embedded URL field.

7 Save the file to the location of your choice.

5.11 Linking to a Product

In some circumstances, you may choose to provide your customers with a direct link to one of your products. For example, the link might be used in an e-mail message or on a campus portal web page.

The easiest way to determine the URL for a product is to navigate to that store through the Marketplace mall after enabling the store. You can then copy the URL that appears in the address field of your browser.

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However, if the store or product has not yet been enabled, you won't be able to visit it by navigating from the Marketplace mall. In this situation, you must understand the format of the store URL. The URL for a product uses the following format:

> https://[subdomain.domain name.top-level domain]/[customer number]_ustores/web/product_detail.jsp?PRODUCTID=[product ID#][&SINGLESTORE=true]

[subdomain.domain name.top-level domain] is typically secure.touchnet.com or secure.touchnet.net or another value determined by your school. This value is consistent for all your stores.

[customer number] is unique for each school. This value is determined by TouchNet, and it's consistent for all your stores.

[product ID#] is the product ID assigned by Marketplace. The product ID value can be determined by viewing the Product Settings page in the Marketplace Operations Center: The ID field is the top field on the page.

[&SINGLESTORE=true] is necessary if you have turned on single-store mode for your store and you want customers to see your store displayed with single-store mode customizations.

Note: PRODUCTID and SINGLESTORE must be in uppercase. These parameter names are case sensitive.

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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

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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.

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 privates stores that require membership in this user group.

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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 Cashering, Pay Path, or eBill, a transaction may already exist that can be used for authentication purposes.

3. In the Marketplace Operations Center, a Marketplace administrator defines an authentication method for the new group. (See **"How to Add an Authentication Method" on page 421**.)
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 424**.)
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"**.)
6. The store manager defines what payment methods the allowed groups can use in the store. (See **"Group Payment Methods"**.)

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

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that case, you would need to create a transaction and then an authentication method to verify faculty and staff users.

These steps assume you have an XML-based transaction available to authenticate group members.

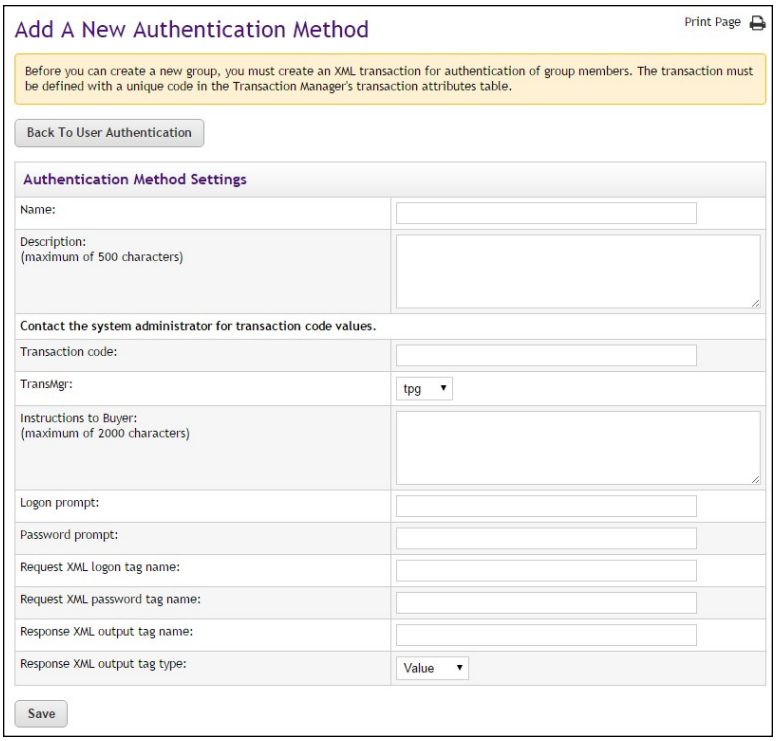
Note: The transaction must be recorded in the transaction attributes table for the Transaction Manager that will pass login credentials to the authenticating system. This must be done before you create the authentication method in Marketplace.

Banner by Ellucian

If your institution uses general ledger integration with Banner by Ellucian, see **"Configuring An Authentication Method for Banner" on page 628** 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.



3. Complete the fields as described below in "Field Definitions," and then click the Save button.

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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.

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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.

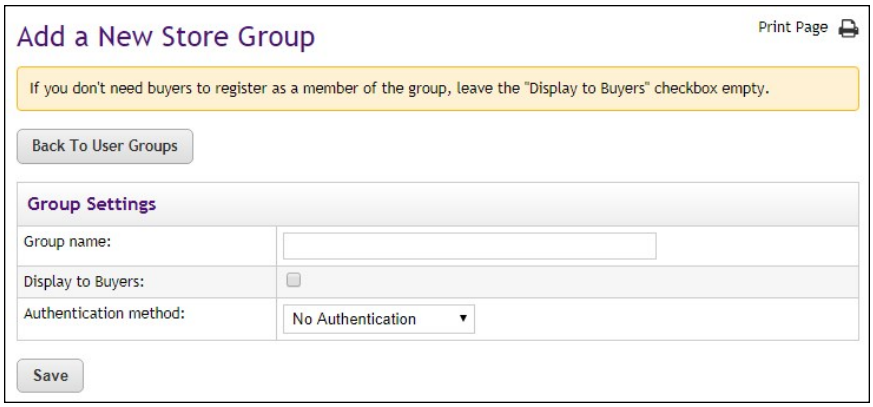
Note: A Marketplace administrator can change authentication settings later. To edit the settings, navigate to System Administration > User Settings > User Authentication, then click the Edit link next to the authentication method name.

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.

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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.

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- **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">
```


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```
<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>
```


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Linking to a Store Category Page

Here are examples of lnking 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>
```


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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 payment card, the e-mail message also confirms the payment 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.

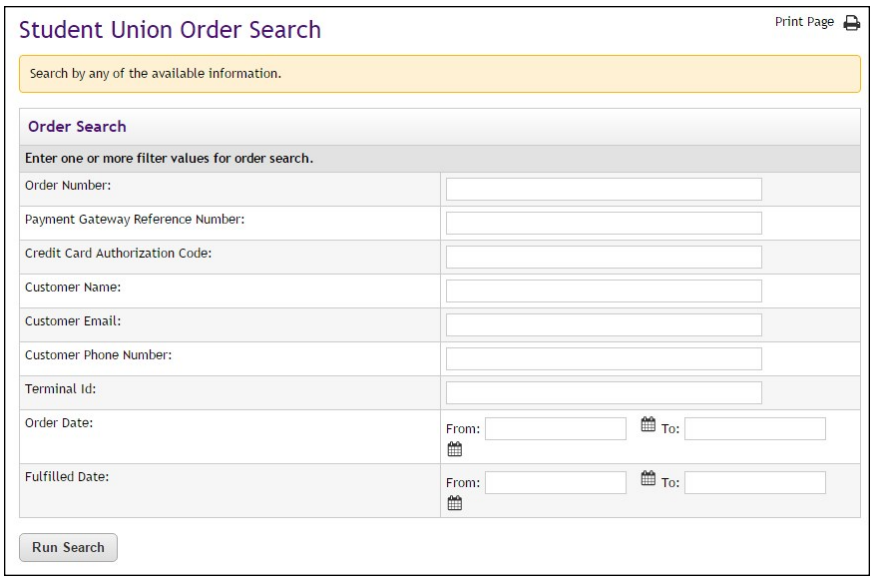
This section also describes how to use Order Search functionality. Only users with the fulfiller user role can view and use the fulfillment pages. However, store users without the fulfiller user role can use Order Search.

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.



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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 payment 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.)

Customer Phone Number

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

Terminal ID

The terminal ID for the Marketplace Point-of-Sale device that was used to process the transaction.

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.

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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.

Partial Entries

You can make partial entries in the following fields: Payment Gateway Reference Number, Credit Card Authorization Code, 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.

Searching With Ancillary Data

When transactions area processed by uStores, ancillary data is passed to Payment Gateway. This data includes Sys Tracking ID and customer name. The data is labelled within the ancillary data field, so it's easy to identify. If you would like to search in Marketplace for a payment that was received in Payment Gateway, you simply enter either the Sys Tracking ID value or the customer name.

Search Results

The order search returns records of any orders that fit the search criteria you entered.



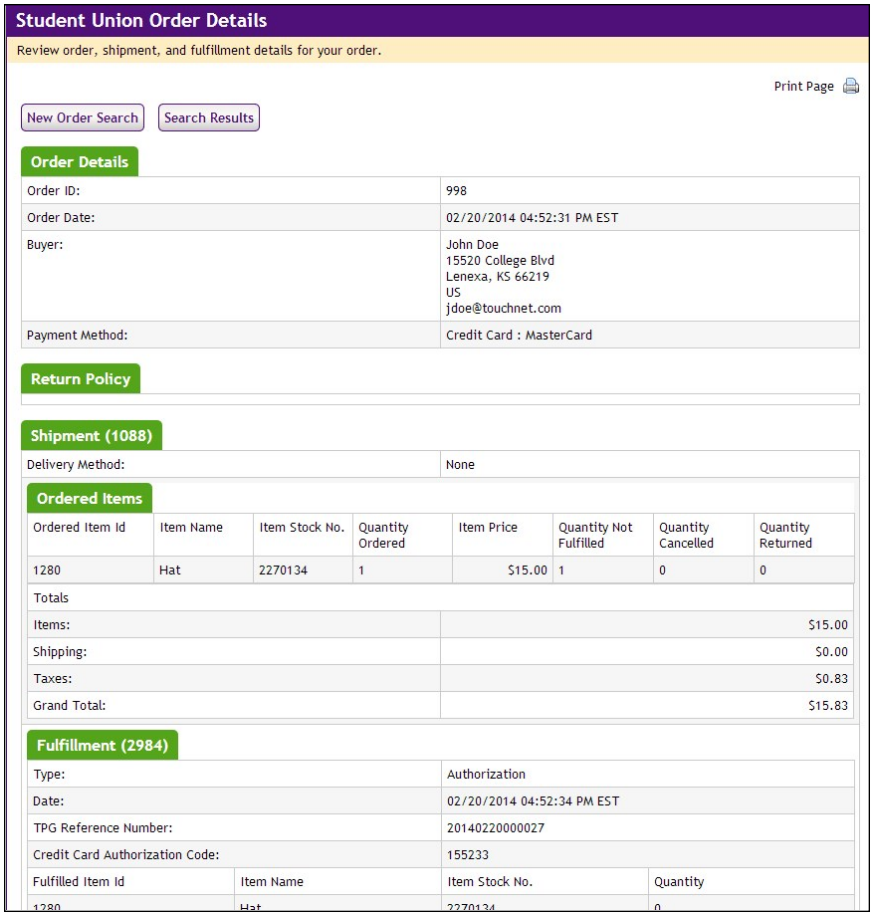
Results of an order search

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.

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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 for full amount 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 payment card was encumbered.

Note: Authorizations that are not fulfilled with 72 hours are automatically reversed.

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Fulfillment (Type: Authorization Reversal)

This sub-section appears under the following conditions: 1) the "Authorize credit card for full amount 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 with 72 hours are automatically reversed. If an authorization reversal takes place, the order can still be fulfilled.

Fulfillment (Type: Purchase)

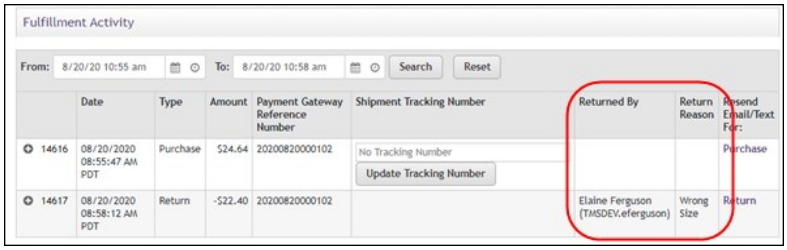
This sub-section appears after the order is fulfilled (including orders that are auto-fulfilled). When this sub-section appears, the customer's payment card has been debited for the amount specified in the Grand Total field.

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.

In the Fulfillment Activity section you can view the name of the individual who initiated the return (in the Returned By column) as well as the return reason description (in the Return Reason column), if the user who initated the return entered a reason for the return.

Note: When a refund is processed, the tax amount is automatically calculated.



The Refunded By and Return Reason fields in the Fulfillment Activity section

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 Payment Card Payments and Fulfillment

When a fulfiller accepts payment on a payment card purchase, the buyer's payment card is charged. Charges for shipping and tax are included in this payment.

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Important! The buyer's payment 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 306**.)

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.

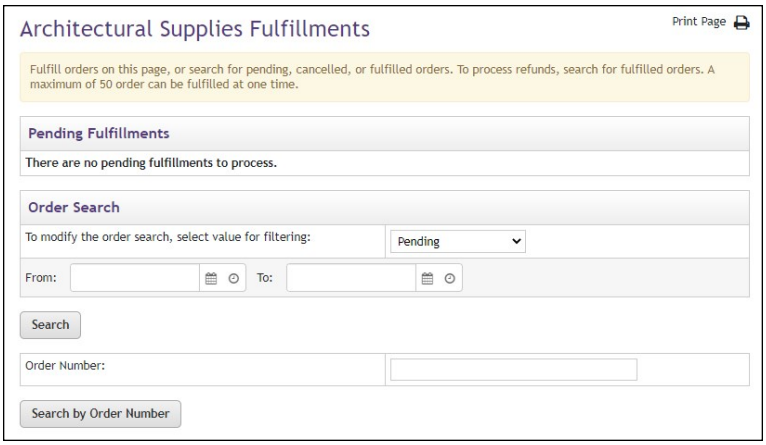
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7.3 Fulfillments

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:

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- **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 and time 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 and a time by selecting the clock icon.

If no date range is entered, all orders for the selected filter will be displayed.

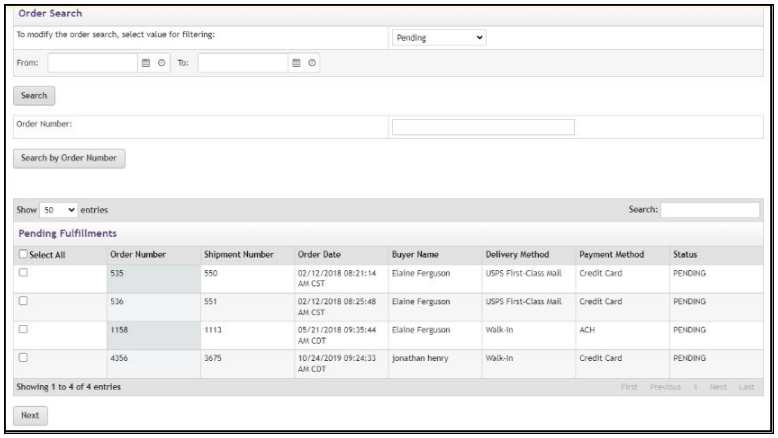
Order Number

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.

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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.

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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.

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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 441**

Completed Fulfillments

This section appears if you select "Order Date" or "Fulfilled Date" as the search type filter and one or more orders meet the search criteria. This section contains fields very similar to Pending Fulfillments, with the following exceptions:

Status

If the order has been fulfilled, this column will say COMPLETED.

View

For fulfilled orders, the View link appears. When you select this link, the details for that fulfillment are displayed. For more about the Fulfillment Details page, see **"Using the Fulfillment Details Page" on page 1**.

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.

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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 442**.

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 441**).

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.

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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 439**); 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.

   After Marketplace processes the Update Payment Status request, a confirmation e-mail message is sent to the customer.

   Note: Confirmation messages are only sent when the payment status changes. If you did not change the payment status in Step 6 above, then no confirmation message will be generated.

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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 439**. 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.

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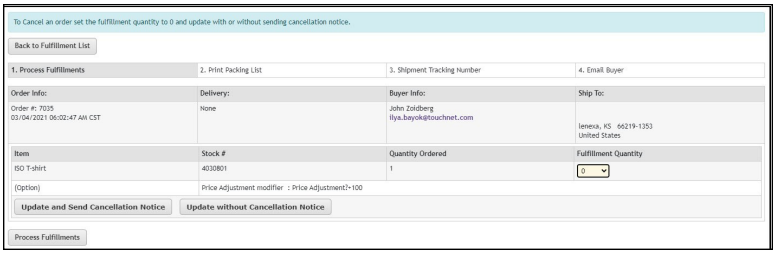
7 If the displayed orders still contain purchase items, you can continue processing the orders by clicking the Accept Payment button.

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 fulfiller has the choice of sending a cancellation notice via a button on the fulfillment screen. If you change the order quantity to any value other than zero, the buyer will receive a new fulfillment e-mail notification with the updated quantity. 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.

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7.6 Processing Refunds

A fulfiller with refund/cancel rights can process refunds for completed orders, crediting payment card purchases back to the buyer's payment 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 Fulfillments Page

The Fulfillments page appears when a user with fulfiller rights selects a store's Fulfill Orders link in the left navigation menu. The Fulfillments 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 Fulfillments 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 filter dropdown list, and
- by searching for a specific order by entering an order number in the Search by Order # field.

Once you locate an order to be refunded, you can initiate the refund process by selecting the order's View link. Only orders that have already been fulfilled have a View link.

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.

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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) Refunded By and 2) Return Reason.

With Marketplace 8.1, a new Refunds page has been added to allow for refunding a single order, refunding a batch of orders, and managing batch refunds. From the Fulfillment Details page, click on the Actions Gear wheel and select Refund from the dropdown list.

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 uStores Refunds

With Marketplace 8.1, a new Refunds option has been added for uStores. This new feature provides the ability to process single refunds as well as batch uStores orders for refunding. This gives Marketplace administrators the ability to search for and refund a single payment, or a group of payments using a variety of filters that you can select.

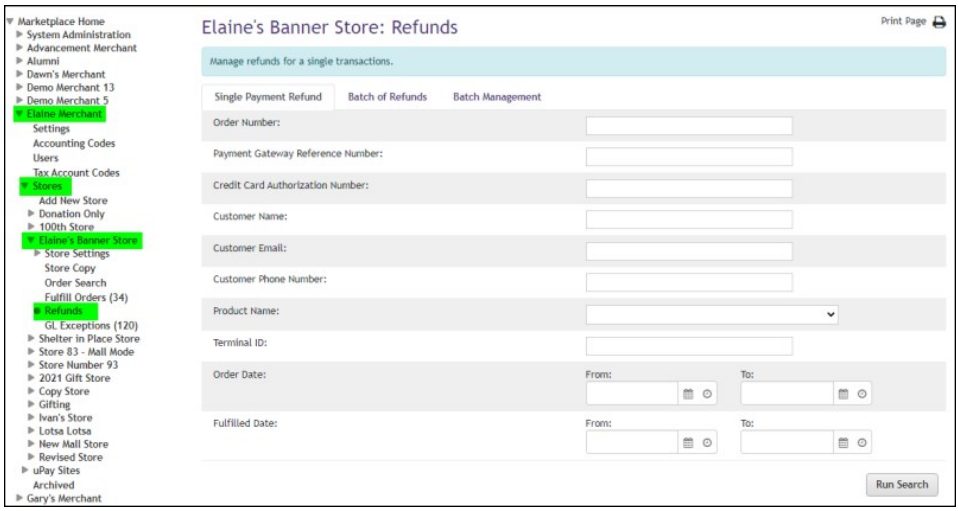
There is also a new Batch Management feature for uStores refunds to give administrators the ability to search for a particular batch and manage the refunds within a batch.

When the Return option is selected, the administrator will be able to update inventory, but not a refund amount.

Recurring payments can be refunded.

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To access the Refunds page: Navigate to Marketplace Home > [merchant name] > Stores > [Store name] > Refunds. The Refunds page displays.



The Refunds page. The Single Payment Refund tab is the default view.

The Refunds page has three tabs:

- Single Payment Refund
- Batch of Refunds
- Batch Management

Creating a Single Payment Refund

Using the Single Payment Refund view, you can search for and refund the entire amount or a portion of a uStores payment. Use the search fields to enter a variety of search criteria to help you locate the desired payment. From the Single Payment Refund view you can process refunds either for payment card payments or ACH payments.

Note: The Fulfiller with Cancel/Refund Rights can access the Refunds menu and process refunds.

To refund a single payment, follow these steps.

1. From the Refunds page, verify you are on the Single Payment Refund view. (The Single Payment Refund is the default view.)
2. Search for the payment you wish to refund by completing the desired search fields. These search fields are not required, but entering search criteria will help to narrow your results. Here are the available search fields, including a short explanation for each field.

Order Number

If you know the specific order number, enter it in this field.

Payment Gateway Reference Number

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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.

Credit Card Authorization Code

The payment 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.

Customer Name

The name entered by the customer as the billing name when the payment was submitted.

Customer Email

The e-mail address entered by the customer during the uStore payment process.

Customer Phone Number

The phone number entered by the customer during the uStore payment process.

Product Name

Click on the dropdown arrow and select from the products list displayed.

Note: When a product is part of a package, both the standalone product and the package product will be displayed. On the single refund or batch refund page, the user will be able to select what will be refunded.

Terminal ID

Enter the terminal ID for the Marketplace Point-of-Sale device that was used to process the transaction.

Order Date

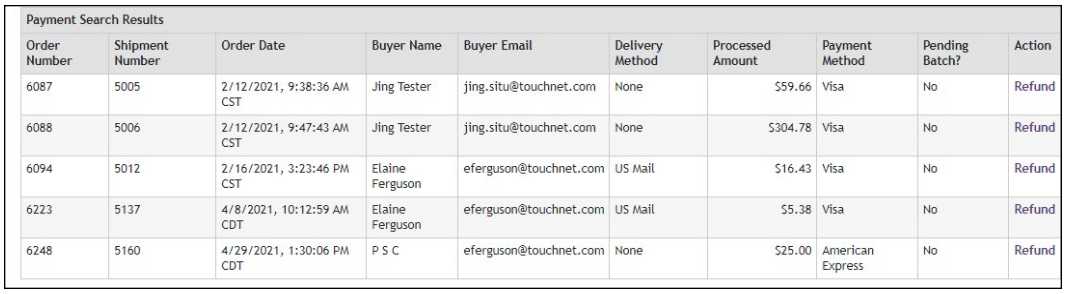
The date and time that the customer submitted the order. If you want to search by Order Date and Time, you can enter a date range by using the From and To fields. You can select a date and/or time by selecting the calendar or clock icons.

Fulfilled Date

The date and time that the order was fulfilled. If you want to search by Date and Time, you can enter a date range by using the From and To fields. You can select a date and/or time by selecting the calendar or clock icons.

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3 Once you have entered all the desired search criteria, click the Run Search button. The Payment Search Results display at the bottom of the page.



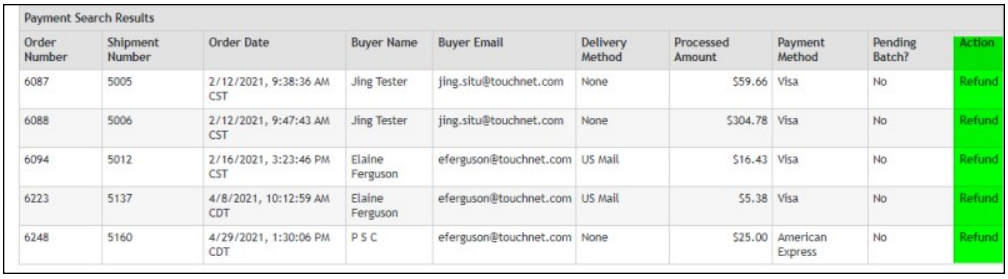
Payment Search Results

Order Number	Shipment Number	Order Date	Buyer Name	Buyer Email	Delivery Method	Processed Amount	Payment Method	Pending Batch?	Action
6087	5005	2/12/2021, 9:38:36 AM CST	Jing Tester	jing.situ@touchnet.com	None	$59.66	Visa	No	Refund
6088	5006	2/12/2021, 9:47:43 AM CST	Jing Tester	jing.situ@touchnet.com	None	$304.78	Visa	No	Refund
6094	5012	2/16/2021, 3:23:46 PM CST	Elaine Ferguson	eferguson@touchnet.com	US Mail	$16.43	Visa	No	Refund
6223	5137	4/8/2021, 10:12:59 AM CDT	Elaine Ferguson	eferguson@touchnet.com	US Mail	$5.38	Visa	No	Refund
6248	5160	4/29/2021, 1:30:06 PM CDT	P S C	eferguson@touchnet.com	None	$25.00	American Express	No	Refund

The Payment Search Results

The payment search results include the Pending Batch field and the Action field. The Pending batch field displays a Yes or No, to indicate if the payment is included in a pending batch. If the payment is eligible to be refunded, the Refund link displays in the Action column.

4 Locate the desired order and click the Refund action link.



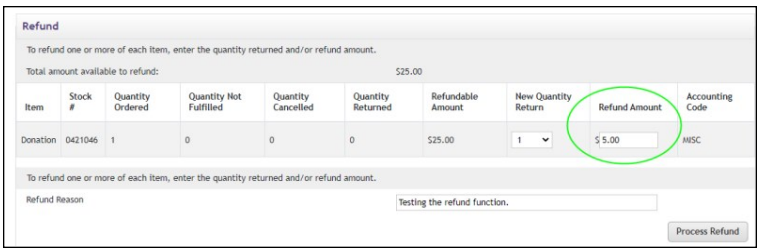
Payment Search Results

Order Number	Shipment Number	Order Date	Buyer Name	Buyer Email	Delivery Method	Processed Amount	Payment Method	Pending Batch?	Action
6087	5005	2/12/2021, 9:38:36 AM CST	Jing Tester	jing.situ@touchnet.com	None	$59.66	Visa	No	Refund
6088	5006	2/12/2021, 9:47:43 AM CST	Jing Tester	jing.situ@touchnet.com	None	$304.78	Visa	No	Refund
6094	5012	2/16/2021, 3:23:46 PM CST	Elaine Ferguson	eferguson@touchnet.com	US Mail	$16.43	Visa	No	Refund
6223	5137	4/8/2021, 10:12:59 AM CDT	Elaine Ferguson	eferguson@touchnet.com	US Mail	$5.38	Visa	No	Refund
6248	5160	4/29/2021, 1:30:06 PM CDT	P S C	eferguson@touchnet.com	None	$25.00	American Express	No	Refund

Click the desired Refund link

5 The Refunds page for the selected order displays. The page displays the applicable return policy, fulfillment activity and the refund detail. Review the order details to ensure you are refunding the correct item. In the Refund section enter the quantity and/or amount to be refunded for items, modifiers, and shipping.

Note: Refunds for one time and recurring payment can be completed from this detailed view.



Refund

To refund one or more of each item, enter the quantity returned and/or refund amount.

Total amount available to refund: $25.00

Item	Stock #	Quantity Ordered	Quantity Not Fulfilled	Quantity Cancelled	Quantity Returned	Refundable Amount	New Quantity Return	Refund Amount	Accounting Code
Donation	0421046	1	0	0	0	$25.00	1	$ 5.00	MISC

To refund one or more of each item, enter the quantity returned and/or refund amount.

Refund Reason: Testing the refund function.

Process Refund

Enter the desired refund amount

6 Enter the applicable reason for the refund in the Refund Reason field.

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7 Click the Process Refund button. If the refund was processed successfully, a "Refund issued" message displays at the top of the page.

The single refund is completed. You can return to the Search Results page to select another single refund.

Creating a Batch of Refunds

From the Batch of Refunds view you can search for groups of orders to include in a batch refund using a variety of search options. Once you have selected the desired payments, you can create the refund batch and define the refund parameters for the batch.

Search results will display whether the order is already included in a pending batch of refunds.

Note: Orders that have a $0 remaining balance will be displayed in the search results but will not be included in the batch creation step, as they cannot be refunded.

Important Notes about Batch Refunds

- Cash payments, Paper Checks, Invoice Me and OneCard payments cannot be refunded via batch refunds.
- Administrators must consider how the Refund Item(s) and Refund Amount criteria work together. For instance:
  - If an administrator chooses to refund all product and associated modifiers on an order along with refunding a specified quantity and/or amount then the quantity and amount will be applied sequentially.
    - Order has 3 items for sale: product A is $10, product B is $10 and product C is $5. If refund all items plus refund specified quantity/amount of 1/$13.00 is entered in the batch then product A will be fully refunded and part of product B will be refunded. Product A and B will both have the 1 quantity returned to inventory.
  - If an administrator chooses to refund a selected product or item for sale along with refunding a specified quantity and/or amount then

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the quantity and amount will be applied to only the selected item, no matter it's sequence in order history.

- If an administrator chooses to refund recurring donation products the quantity field will not apply.

- Administrators must consider how Refund specified quantity and/or amount will affect their inventory. The specified quantity will be returned to inventory for each item selected to refund.
- Administrators must consider how Refund specified quantity and/or amount is applied when taxes are included. The amount entered is inclusive of taxes.
  - If a partial amount is entered the refund amount will be applied to the item and its taxes before it is applied to item modifiers and taxes.
    - For instance: a $5.00 refund could be applied:
    - Item A is $10.00 plus $.20 tax. A $5.00 refund will be applied as $4.91 to the item and $.09 to taxes.
    - Item A is $2.50 plus $.05 tax. Item A modifier is $7.50 plus $.15 tax. A $5.00 refund will be applied as item A $2.50, item A tax $.05, Item A modifier for $2.40 tax and item A modifier tax of $.05.
- Administrators must consider how Refund specified quantity or amount will affect items with modifiers. The item and its tax will always be refunded prior to the item modifier(s) and their taxes. Item modifiers will be refunded sequentially; exhausting one before moving on to the next.
  - For instance: a $5.00 refund could be applied:
    - Item A is $2.50 with no tax. Item A Modifier 1 is $2.50 with no tax. Item A Modifier 2 is $5.00 with no tax. A $5.00 refund will apply to Item A for $2.50 followed by Item A Modifier 1 for $2.50. No portion of Item A Modifier 2 will be refunded.
- Administrators must consider how Refund other shipping amount is applied when taxes are included. The amount entered is inclusive of taxes. Shipping charges and their associated taxes are refunded separately from items and their associated taxes.
- When a batch includes orders with different shipping methods and Refund other (shipping) amount is selected each order in the batch must have a remaining shipping balance equal to the specified amount of the batch cannot be created.
  - Orders with shipping charges and orders without shipping charges would need to be separated into 2 batches, if shipping charges are to be refunded.
- If a refund amount/quantity is specified that is more than one of the ordered items selected for a batch an error message will be displayed

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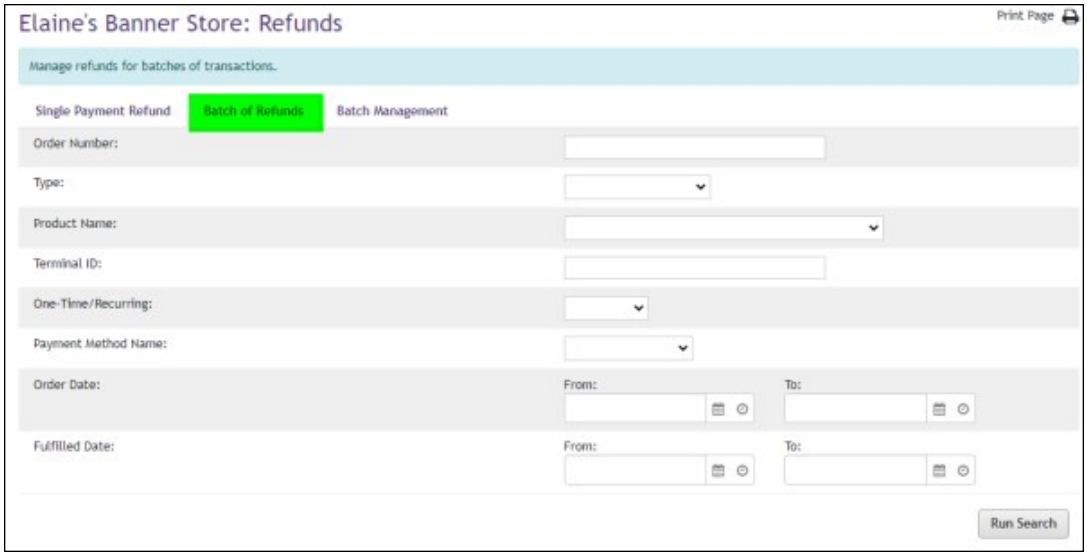
to the administrator stating "Order Number(s) with Order Amounts less than specified refund amount. Please correct." or "Order Number (s) with Quantity less than specified quantity to be returned. Please correct."and the batch will not generate. Administrators can then alter the refund amount and/or quantity or remove those orders from the batch by deselecting them.

- If a shipping refund amount is specified that is more than one of the orders selected for a batch an error message will be displayed to the administrator stating "Order Number(s) with Shipping Amounts less than specified refund shipping amount. Please correct." and the batch will not generate. Administrators can then alter the refund shipping amount or remove those payments from the batch by deselecting them.
- For recurring donations the batch will only include completed payments at the time the batch is created. Subsequent completed recurring payments will not be recognized in that batch.
- If the Refund Recurring Payments parameter is set to No the recurring payments initially included in the batch will be hidden from the display and not included in the batch generation step.
- Once a batch is created, payments cannot be added to the batch. Payments can be removed from the batch once it is created via the edit batch process.
- Once a batch is created, the "Refund item(s)" and "Refund recurring payments?" setting cannot be altered because it could cause payments to be added to a batch.
- If a single payment refund is completed against an order included in a pending batch and the pending batch is subsequently submitted, the batch will try to process using the batch parameters. If the batch specified a refund amount/quantity that is now greater than the remaining balance/quantity, the refund will fail. If the batch is to refund the full amount/quantity, it will refund the updated remaining balance/quantity.
- If an administrator wishes to look at the details of a specific order to determine if it should be included in a batch they can click on the Order Number hyperlink and a pop-up modal will appear with the order details.

Follow these steps to create a batch refund:

1 Click the Batch Refunds tab to display the search criteria page for a batch of Refunds.

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uStores Batch of Refunds tab

2 To create the desired refund batch, you will first need to search for the payments to include in the batch. Just like single payment refunds, you are able to search for orders using a variety of filters. To search for orders to include in the batch of refunds, enter the desired search criteria in these fields.

Order Number

If you know the order number you would like to include in the batch, enter it in the Order Number field.

Type

Select the desired uStores type from the dropdown menu.

Product Name

Select the desired product name from the dropdown menu.

Terminal ID

Enter the terminal ID for the Marketplace Point-of-Sale device that was used to process the transaction.

One-Time/Recurring

Select to search for a one-time payment or a recurring payment from the dropdown menu.

Payment Method Name

Select the desired payment method from the dropdown menu.

Order Date

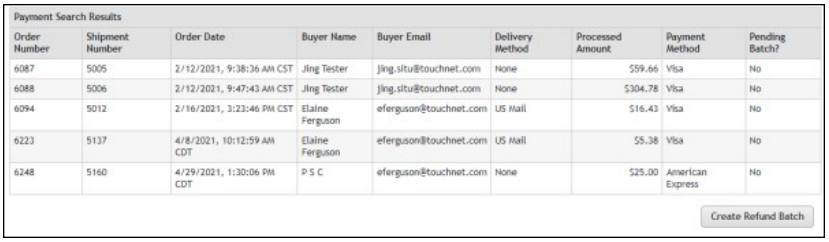
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The date and time that the customer submitted the order. If you search by Order Date and Time, you must enter a date range by using the From and To fields. You can select a date and time by selecting the calendar or clock icons.

Fulfilled Date

The date and time that the order was fulfilled. If you want to search by Date and Time, you can enter a date range by using the From and To fields. You can select a date and/or time by selecting the calendar or clock icons.

3 Once you have entered all the desired search criteria, click the Run Search button. The Payment Search Results display at the bottom of the page.



Payment Search Results

Order Number	Shipment Number	Order Date	Buyer Name	Buyer Email	Delivery Method	Processed Amount	Payment Method	Pending Batch?
6087	5005	2/12/2021, 9:38:36 AM CST	Jing Tester	jing.situ@touchnet.com	None	$59.66	Visa	No
6088	5006	2/12/2021, 9:47:43 AM CST	Jing Tester	jing.situ@touchnet.com	None	$304.78	Visa	No
6094	5012	2/16/2021, 3:23:46 PM CST	Elaine Ferguson	eferguson@touchnet.com	US Mail	$16.43	Visa	No
6223	5137	4/8/2021, 10:12:59 AM CDT	Elaine Ferguson	eferguson@touchnet.com	US Mail	$5.38	Visa	No
6248	5160	4/29/2021, 1:30:06 PM CDT	P S C	eferguson@touchnet.com	None	$25.00	American Express	No

Create Refund Batch

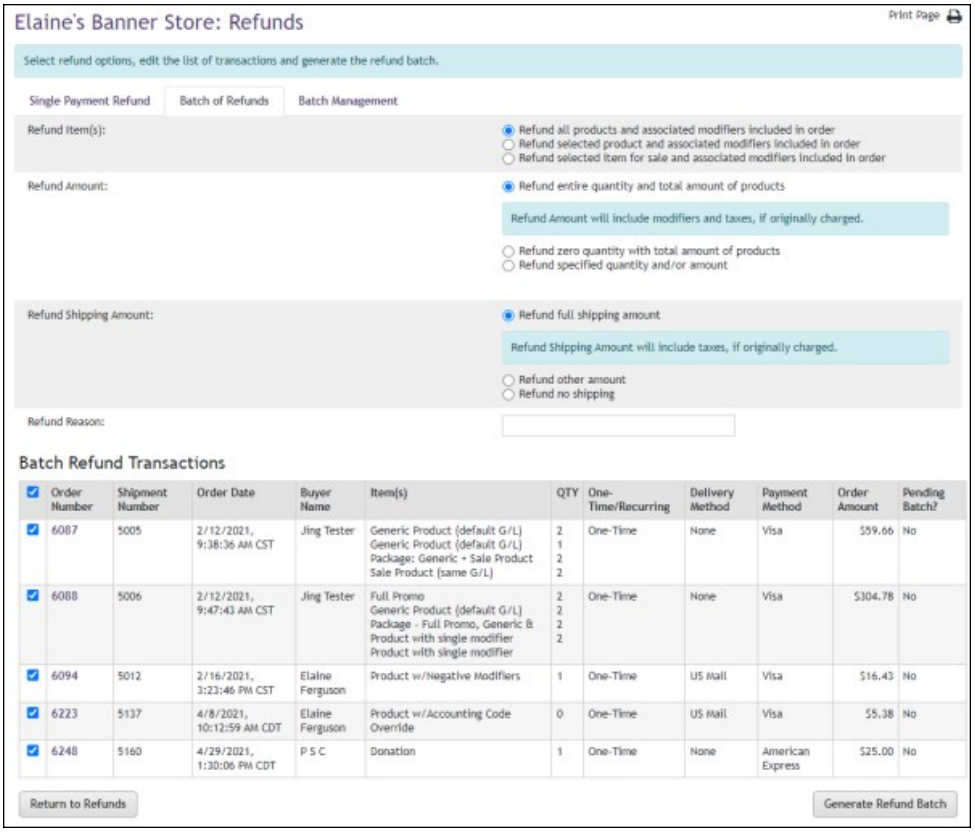
Batch of Refunds Payment Search Results

Note: Payments that have a $0 remaining balance will be displayed in the search results but will not be included in the batch creation, as they cannot be refunded.

4 Review the payments in the search results. Click the Create Refund Batch button.

When the Create Refund Batch button is clicked the display will be refreshed with a view that allows the administrator to set the refund parameters, select or deselect orders from the batch, and generate the batch.

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uStores Batch Refund Transactions view

The parameters that can be set on uStores refund batch include:

Refund Item(s)

Administrators will be able to choose between refunding all products (and associated modifiers) included on the other, Refund selected product (and associated modifiers) included in the order or Refund selected item for sale (and associated modifiers) included in the order.

- When refund selected product or refund selected item for sale is chosen a dropdown select will appear with a list of products or items for sale associated to the orders in the batch.
- If an order does not have the selected package, product or item for sale it will be deselected from the batch and hidden from display.
- Only one product or one item for sale can be chosen for an individual batch.

Refund Amount

Administrators will be able to choose between Refund entire quantity and total amount of products, Refund zero quantity with total amount of products or Refund specified quantity and/or amount.

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- When a store does not allow partial refunds the third option will be for Refund specified quantity; the amount option will not be available.
- If a recurring donation order is included in the batch, the quantity to return to inventory value will not apply.
- Shipping charges and their associated taxes are refunded separately from the items and their taxes.

Note: See the ***Important Notes about Batch Refunds*** section for more information about how Refund Item(s) and Refund Amounts settings work together.

Refund Shipping Amount

Administrators will be able to choose between Refund full shipping amount, Refund other amount or Refund no shipping.

- For a store that does not allow shipping refunds this criteria will not be displayed.
- Shipping charges and their associated taxes are refunded separately from the items and their taxes.

Refund Recurring Payments

Administrators will be able to select whether recurring payments should or should not be included in the batch. If recurring payments are to be included, the administrator can decide whether to refund all completed recurring payments or just the most recent recurring payment ***at the time the batch is created***.

Refund Reason

Administrators can enter an optional refund reason to be associated with each refund included in the batch.

5 Once you have selected all the desired batch refund parameters, click the Generate Refund Batch button.

Note: All batches are generated in a Pending status.

6 A message displays at the top of the Refunds page indicating the batch was generated successfully. The message includes the batch number. The Batch Management view is displayed.

Important! The batch will be created in a **Pending** status and will not be automatically run. You will need to Schedule or Submit the batch using the Action dropdown menu.

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Viewing and Managing Batches

From the Batch Management tab administrators will be able to search for and manage batches. Batches can have statuses of pending, cancelled, scheduled, processing and completed. The batch search results table will display the number of payments included in the batch, number in error, number completed and the approximate revenue to be refunded, including shipping and taxes.

Pending batch actions include editing the batch, canceling the batch, scheduling the batch to process at a later date/time, submitting the batch immediately and viewing a batch history.

1 Select the Batch Management tab. The Batch Management view displays.



The Batch Management view

2 To search for a refund batch, enter your selection(s) in the following fields.

Select batch generation date

Use the From and To fields to locate the desired batch(es) by the date it was generated. You can select a date and time by selecting the calendar and/or clock icons.

Select batch status

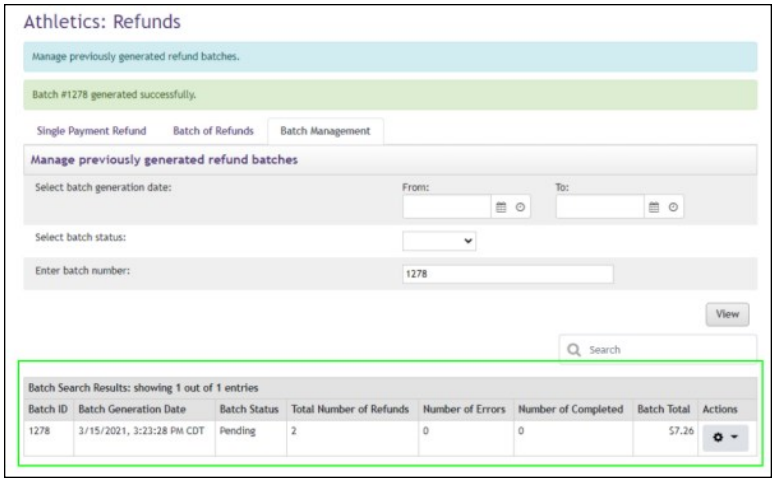
Use the dropdown to select the desired status. You can search for all refund batches that have been created or you can narrow your search by one of the following statuses: Pending, Processing, Completed, Scheduled, Cancelled.

Enter batch number

To search for a specific batch, enter the desired batch number.

3 Once you have selected all the desired batch refund search parameters, click the View button. The Batch Search Results display at the bottom of the page.

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The Batch Search Results section

The Batch Search Results include information based on your search selections. The search results include the following details about each refund batch:

- Batch ID
- Batch Generation Date
- Batch Status
- Total Number of Refunds
- Number of Errors
- Number of Completed
- Batch Total
- Actions - the Actions that can be performed for a batch depend on the status of the refund batch.

Performing Actions for a Refund Batch

From the Batch Search Results section, you can also perform a number of actions on a refund batch, based on the Batch Status. The following table lists the applicable Batch Status and the associated actions that can be performed for the batch.

Batch Status	Actions
Pending	• Edit • Cancel • Schedule • Submit • Batch History

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Batch Status	Actions
Processing	• Processing Status • Batch History
Completed	• Batch History • Batch Success Report • Batch Errors Report
Scheduled	• Unschedule • Batch History
Cancelled	• Batch History

Actions

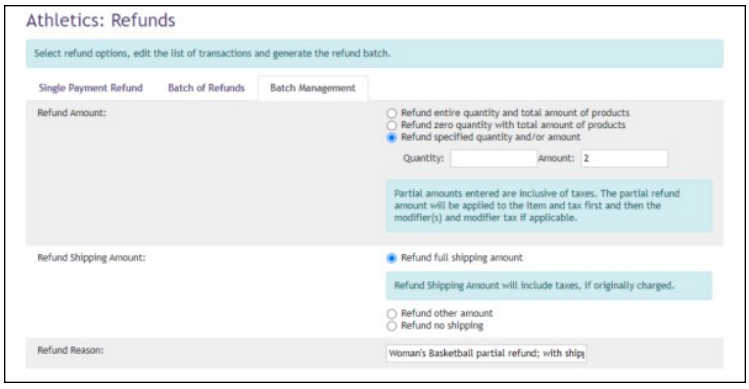
The following describes the actions that are available for refund batches, based on the Batch Status.

Edit

The edit batch action displays the batch details view with the previously set parameters.

Reminders:

- Refund item(s) setting cannot be edited.
- Refund recurring payment setting cannot be edited.
- Orders can be removed from a batch but they cannot be added to a batch.
- Payments at the time the batch was created are included (not at the time it was edited).



Cancel

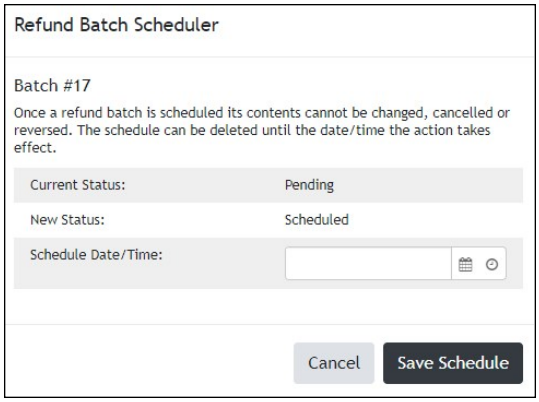
If you select the Cancel action for a Pending refund batch, a popup window displays to confirm that you wish to cancel the pending refund batch.

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If Yes is selected, a message displays at the top of the Batch Management view indicating the batch was cancelled. No additional action can be taken on this batch.

Schedule

If you select the Schedule action for a Pending refund batch, the Refund Batch Scheduler window displays. Select the desired date and time that you wish the refunds to be processed and click the Save Schedule button.



The batch status will be changed to Scheduled.

When the specified date and time occur, Marketplace will kick off the batch, moving the batch to Processing status and submitting the refunds to the appropriate payment gateway for processing.

Important! **Notes about the Schedule Action**

• Once a batch has been scheduled, you can Unschedule it if you no longer wish to process the refund at the date and time you previously scheduled it.

• Unschedule – The action dropdown will include the Unschedule option once you Schedule the refund batch. If you select the Unschedule action, a popup window displays to confirm the batch is being removed from a schedule.

• Unscheduling a batch will return it to Pending status.

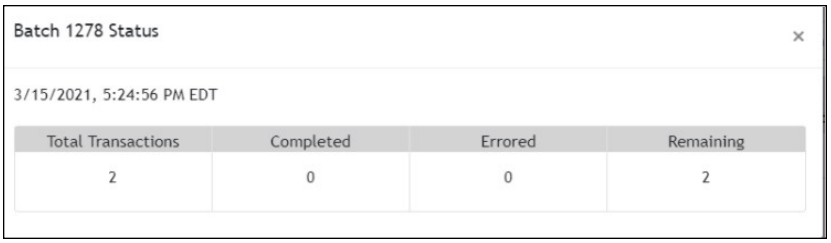
Submit

The Submit action displays a popup window to confirm you want to submit the refund batch. Once you confirm the submit action, no changes can be made to the batch and it cannot be cancelled or reversed. Confirming the submit action moves the batch to a Processing status. Marketplace will begin to submit the refunds to the appropriate payment gateway for processing.

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Note: When a batch has been submitted, either by a schedule or by the submit action, it will be moved to Processing status.

Important! To see an updated status the administrator can re-execute the Batch Processing Status action or they can return to the Batch Management page and click View to refresh the batch status.



When a batch has been completed (and the page refreshed/re-accessed) the search table will be updated with the number of errors and completed refunds. Completion of a batch means that each payment in the batch:

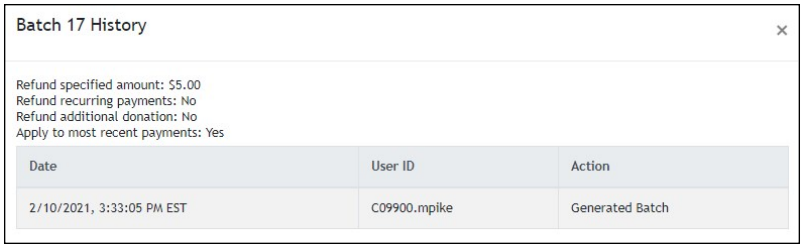
- Has been submitted to the correct payment gateway
- Success or failure of the refund recorded
- Marketplace fulfillment has been completed
- General Ledger has been updated, if applicable
- Emails have been sent
- Order history has been updated
- Batch status has been updated.

A new refund email has been created for batch refunds in uStores. This email contains most of the same elements in the single refund email, including the store's Refund Announcement, Store and Order details, amounts and items refunded.

Batch History

Batch History reporting can be accessed for any batch, regardless of status. The history lists the parameters of the batch as well as each action taken on the batch by user and date and time.

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Processing Status

While in Processing status, you can check the Processing Status via the action dropdown. A pop-up window displays showing the total number transactions, how many are completed, in error, and remain to be submitted. To get updated statuses you can re-execute the submit action.

Batch Error Report

The Batch Error report can be downloaded as a .CSV file and will include details about orders that could not be refunded. If errors were not encountered during the processing of a batch this report will not display in the Action dropdown menu.

Batch Success Report

The Batch Success report can be downloaded as a .CSV file and will include details about orders successfully refunded. If no payments were successfully refunded during the processing of a batch this report will not display in the Action dropdown menu.

About Refunds & ACH

ACH transactions must be “settled” in Payment Gateway before they can be refunded in Marketplace. For schools that use Heartland Payment Systems as the processor, TouchNet automatically marks ACH batches as settled.

However, schools that originate their own ACH batch files should ensure that either …

- Payment Gateway has been configured to automatically settle ACH batches after the ACH wait days period has expired

  OR

- a Payment Gateway administrator periodically logs into the Payment Gateway Operations Center and manually marks ACH batches as settled (typically after the school’s bank has completed processing of all transactions in a batch).

If you do not know how ACH transactions are handled regarding batch settlement, we recommend you contact your Payment Gateway administrator.

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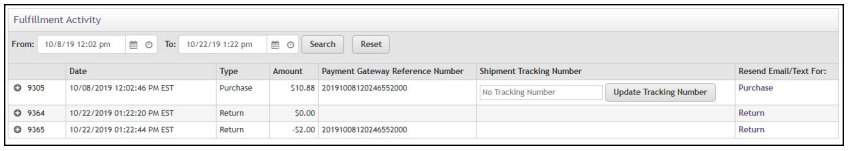
7.7 Resending Fulfillment Messages and Receipts

A fulfiller can resend fulfillment messages and resend purchase or refund receipts when necessary. To resend a fulfillment message or receipt, follow these steps:

1. Navigate to Marketplace Home > [merchant name] > Stores > [store name] > Fulfill Orders. The Store Fulfillments page appears.
2. Select Fulfilled Date or Ordered Date from the filter dropdown list, and then select a date range to search. Click the Search button. The Fulfillments page is updated to display the orders that meet the criteria that you entered.

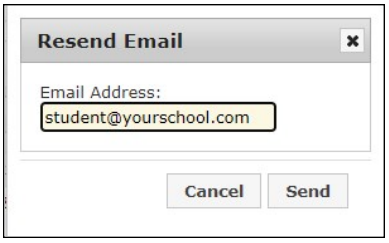
   Note: If you know the specific order number, you can alternately enter the order number in the "Order Number" field and then click the "Search by Order Number" button.

3. Locate the order in the displayed list and select its View link in the Action column. The fulfillment details page for that order is then displayed. Look for the Fulfillment Activity table.



The Fulfillment Activity table

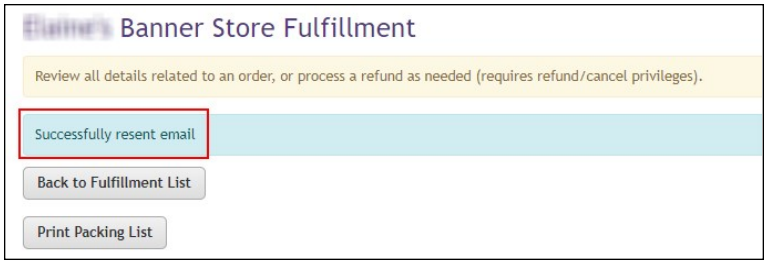
4. The Fulfillment Activity table shows all fulfillments for the order. The "Resend Email/Text For" column lists messages that can be resent as well as purchase and refund receipts. To resend a message or receipt, click the text link for the desired message/receipt type.
5. A resend Email popup box displays. Enter the applicable email address to resend the message of receipt and click Send.



The Resend Email popup box

6. A "Successfully resent mail" message displays at the top of the Fulfillment page.

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7.8 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.

7.9 About Authorizing Payment Cards at Order Time

A Marketplace merchant (and all the stores under that merchant) can be set to use Marketplace's "Authorize credit card for full amount 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 payment card for payment, the customer's payment card is *encumbered* at the time an order is submitted. If the payment 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 payment card is encumbered, a hold is placed on the customer's payment card. The transfer of funds does not take place until a subsequent

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settlement request is received by the payment card processor. Until then, however, the customer's payment 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 payment card settlement takes place, the original authorization is used for the payment 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 payment 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 payment 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 payment 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 for full amount 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 payment 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 payment card. As a result the payment card will be encumbered again (briefly), and immediately afterwards, the authorization will go through the settlement process.

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8.0 Automatic E-mail Messages

This section is about the e-mail messages that are sent to customers, as well as e-mail messages that are sent to Marketplace users who are monitoring store and product transactions.

8.1 Monitoring Store and Product Transactions

Store managers, merchant managers, and fulfillers can be notified by e-mail when orders are placed for specific stores. Configuration for store-level notifications is located on the Update Profile page for each user. This configuration allows each user with the store manager, merchant manager, or fulfiller role to choose which stores they would like to receive notifications. For details about how these users can set themselves up for notifications, see **"Your User Profile" on page 26**.

In the Store General Settings, e-mail addresses can be entered so that notifications will be sent when donation transactions take place. When any donation is accepted for any donation in the store, an e-mail message will be sent to all the configured e-mail addresses. This configuration is located in the Donation Notifications section of the Store General Settings page. For details about how to set up these users for notifications, see **"General Settings" on page 152**.

In addition, each product can be configured with a list of e-mail addresses. When that product is purchased, e-mail notifications will be sent to all the configured e-mail addresses. The configuration for product-level e-mail notifications is located on the Product Settings page for each product. For details about the configuration setting for product-level notifications, see **"Editing Products" on page 306**.

Each item for sale can be configured to send a low inventory notification e-mail message when the product inventory hits a threshold value for that item. Another low inventory message will be sent when the inventory reaches zero. Low inventory notifications are sent to the e-mail addresses entered in the Low Inventory Product Notification field on the Store General Settings page.

If there are errors with recurring payments, an error message is sent to the e-mail address is configured in the *tmsrecur.prp* file and was established when Marketplace was installed. If you need to change this e-mail address, please contact TouchNet Customer Care.

Note: E-mail notification messages sent from the TouchNet Data Center's test environment include the word "TEST" in the message subject.

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8.2 E-mail Notifications for Customers

When each customer submits 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 payment 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. And yet another type of message is sent when a refund is processed. The announcement section of these message types can be customized as described in **"Editing E-mail Messages" on page 471**. These e-mail messages are sent in HTML format.

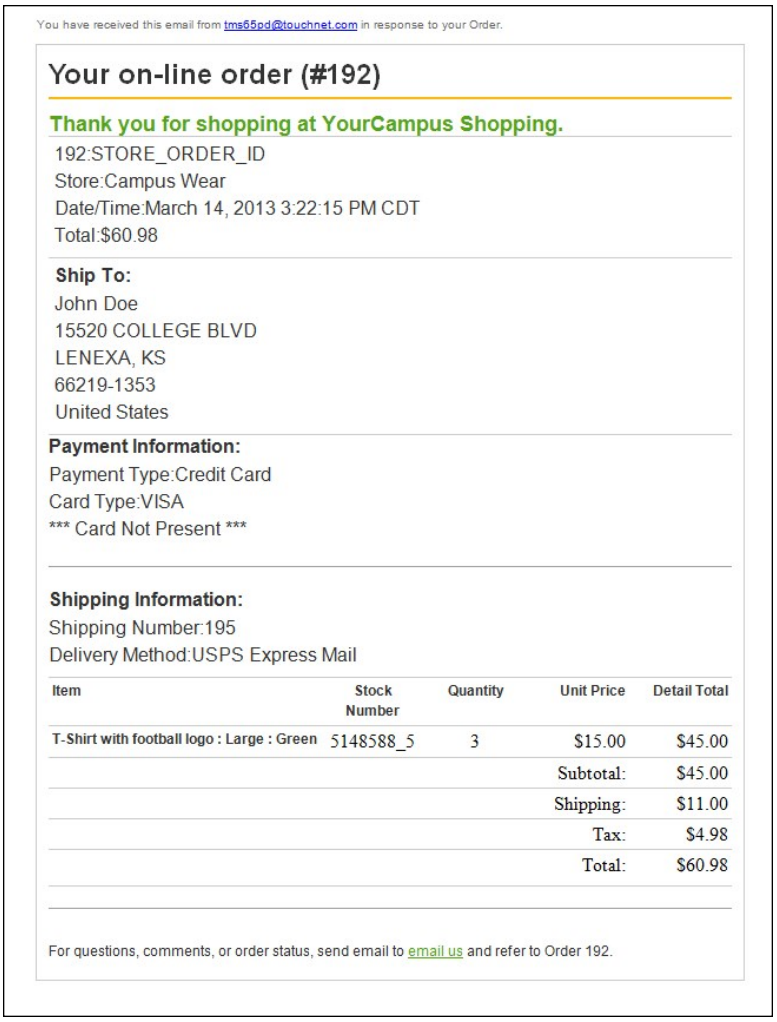
In addition to editing the messages described above, confirmation messages for recurring payments can be customized. These messages include reminder messages that can be sent a particular number of days before each scheduled recurring payment.

Note: E-mail notification messages sent from the TouchNet Data Center's test environment include the word "TEST" in the message subject.

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Examples of E-mail Messages for Customers

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 ***

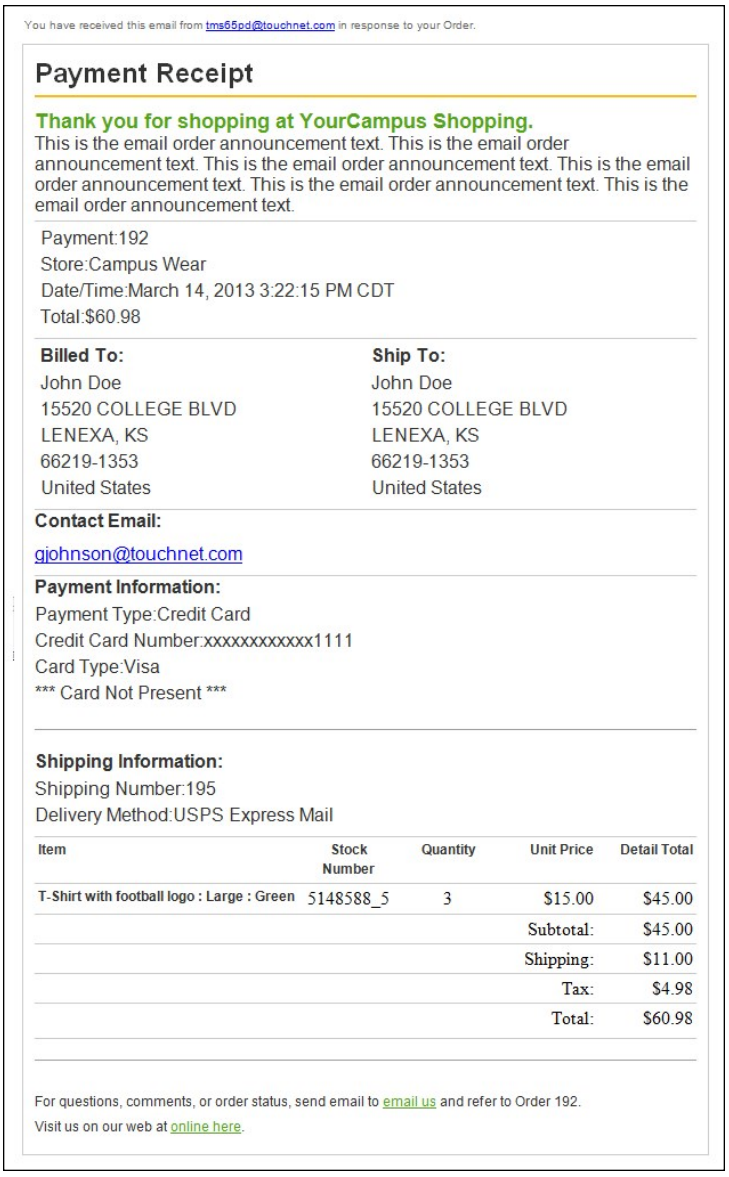
Shipping Information:
Shipping Number:195
Delivery Method:USPS Express Mail

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.

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Here is an example of a fulfillment e-mail message:



You have received this email from tms65pd@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. This is the email order announcement text. This is the email order announcement text. This is the email order announcement text. 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:xxxxxxxxxxxx1111
Card Type:Visa
*** Card Not Present ***

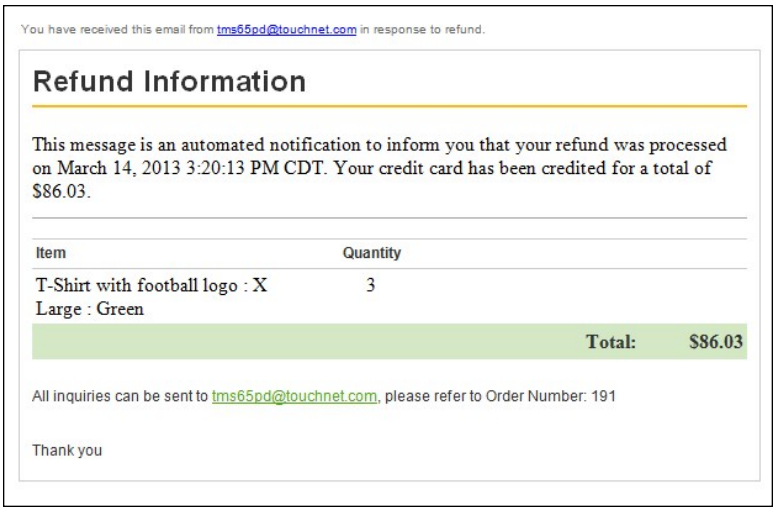
Shipping Information:
Shipping Number:195
Delivery Method:USPS Express Mail

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.

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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.

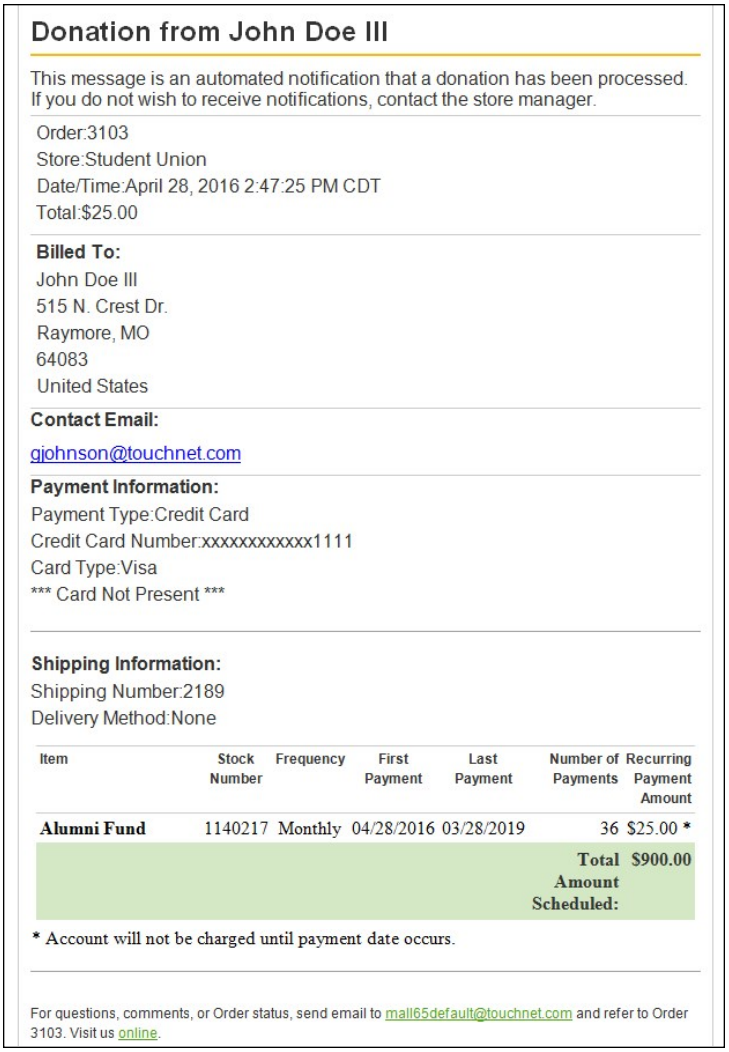
Item	Quantity
T-Shirt with football logo : X Large : Green	3
	Total: **$86.03**

All inquiries can be sent to tms65pd@touchnet.com, please refer to Order Number: 191

Thank you

Here is an example of a confirmation message after recurring payments have been established:

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Donation from John Doe III

This message is an automated notification that a donation has been processed. If you do not wish to receive notifications, contact the store manager.

Order:3103
Store:Student Union
Date/Time:April 28, 2016 2:47:25 PM CDT
Total:$25.00

Billed To:
John Doe III
515 N. Crest Dr.
Raymore, MO
64083
United States

Contact Email:
gjohnson@touchnet.com

Payment Information:
Payment Type:Credit Card
Credit Card Number:xxxxxxxxxxxx1111
Card Type:Visa
*** Card Not Present ***

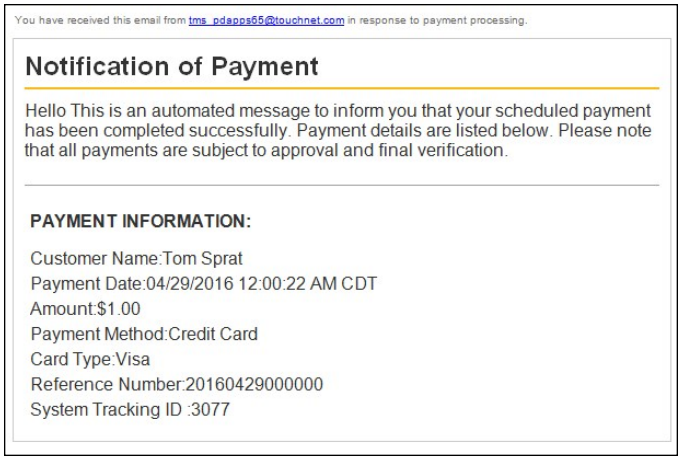
Shipping Information:
Shipping Number:2189
Delivery Method:None

Item	Stock Number	Frequency	First Payment	Last Payment	Number of Payments	Recurring Payment Amount
Alumni Fund	1140217	Monthly	04/28/2016	03/28/2019	36	$25.00 *
					Total Amount Scheduled:	**$900.00**

* Account will not be charged until payment date occurs.

For questions, comments, or Order status, send email to mall65default@touchnet.com and refer to Order 3103. Visit us online.

Here is an example of a recurring payment message:



You have received this email from tms_pdapps65@touchnet.com in response to payment processing.

Notification of 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 INFORMATION:

Customer Name:Tom Sprat
Payment Date:04/29/2016 12:00:22 AM CDT
Amount:$1.00
Payment Method:Credit Card
Card Type:Visa
Reference Number:20160429000000
System Tracking ID :3077

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Editing E-mail Messages

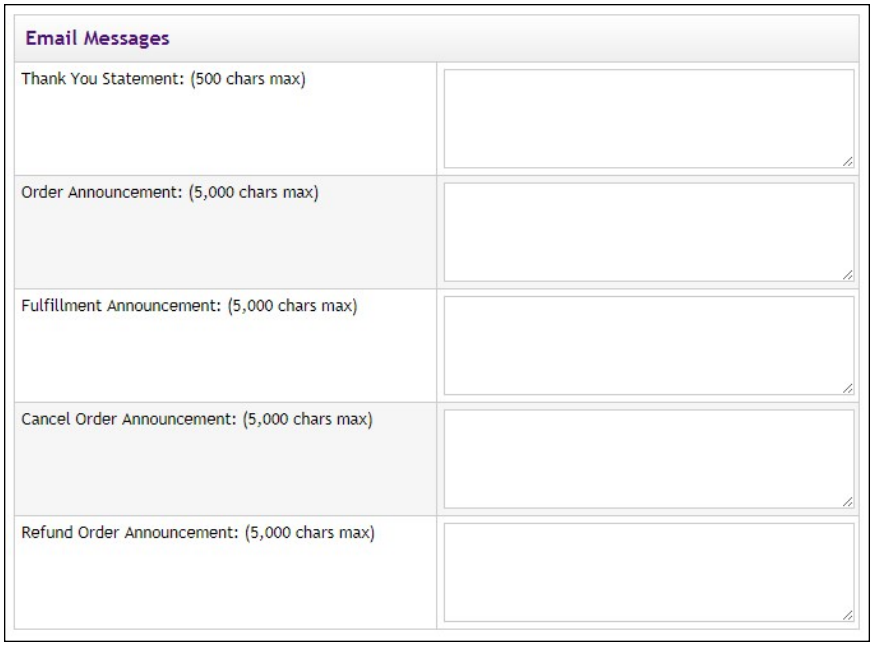
You can add text to several types of store e-mail messages: order confirmations, fulfillment confirmations, cancellation confirmations, and refund confirmations. In addition, your can add text to Invoice Me e-mail message and recurring payments e-mail messages.

The Email Thank You Statement that you configure on the Store Email Messages page is used with all store e-mail messages. In addition, each message type has its own announcement field, so you can customize a message based on the needs of each message type.

Note: These fields do not accept HTML. Your entries must be text only.

You likely already entered text for the E-mail Order Announcement, the E-mail Fulfillment Announcement, the E-mail Cancel Order Announcement, and the E-mail Refund Order Announcement when you established your store. However, you can edit text used in these e-mail messages (as well as the Invoice Me and the recurring payments messages) by using the following instructions:

1. From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Email Messages. The Email Messages page appears.



These fields appear at the top of the Email Messages page.

2. The text that you enter in the Email Thank You Statement field will appear immediately below the message heading in all mail messages placed at this store. This text will appear as bold text and should be a short, simple statement thanking the customer for placing an order (or making a donation). The text you enter in this field will override the Thank You Statement configured for the entire mall (on the

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Marketplace General Settings page). If you do not make an entry in this field, the mall-level Thank You Statement will be used. For an example of the order confirmation e-mail message, see **"Examples of E-mail Messages for Customers" on page 467**.

3. The text that you enter in the Email Order Announcement field will appear near the top (below the Thank You Statement) of order confirmation e-mail messages for this store. This text can serve as a short message from your store to the customer. All customers who place orders at this store will 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 for Customers" on page 467**

4. 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 to let them know their order has been fulfilled and (if applicable) shipped). 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 for Customers" on page 467**

5. 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 by a fulfiller with cancel/refund rights. 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 for Customers" on page 467**

6. The text that you enter in the Email Refund Order Announcement field will appear near the top of refund e-mail messages. These messages are sent to customers after a refund has been processed by a fulfiller with refund/cancel rights. The Email Refund Order Announcement can serve as a short message from your store to the customer. All customers receive this same announcement in refund e-mail messages. The order details appear after the Email Refund Order Announcement text. For an example of a refund e-mail message, see **"Examples of E-mail Messages for Customers" on page 467**

7. The fields described above are the basic fields that should be configured for all stores. In addition, if your store offers Invoice Me as a payment method, you should complete the Invoice Me field. And if

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your store accepts recurring payments with donations, you should complete the Recurring Payments fields.

8 Click the Save button.

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 "Contact Us" field in the Store Template Setup (for the Designer template, see Store Layout tab > Curtain Nav. If this field has not been configured for the store, then this value comes from the "Contact Us" setting in Mall Template Setup (for the Designer template, see Mall Layout tab > Curtain Nav. If the "Contact Us" field has not been configured for both the store and the mall, then the "from" e-mail address comes from the email.FromAddress parameter in the uStores *critical.prp* file. (The e-mail address in the *critical.prp* file was named when Marketplace was set up. If this address must be changed, you should contact your Marketplace administrator.)
Fulfillment confirmation	
Cancellation confirmation and refund confirmation	
Message generated by clicking the "Contact Us" link while viewing any store page	
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 *critical.prp* file was named when Marketplace was set up. If this address must be changed, you should contact your Marketplace administrator.)
Recurring payment confirmation (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 *tmsrecur.prp* file.

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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.

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Part 4:

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 payment card number and an expiration date (or a bank routing number and a bank account number). After the payment is

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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

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uPay User Roles

User Role	What They Can Do
Site Manager	• Manage the allowed payment methods • Configure the site to accept recurring payments • Configure site links and URLs • Configure e-mail announcement text • Configure layout templates • Configure additional donation offerings • Take uPay sites online or offline • Search for payments • Cancel/refund payments • Review Marketplace financial reports for the uPay site • Refund a single payment, or a group of payments
Payment Clerk	• Search for payments • Cancel/refund payments
Accountant	• View Marketplace financial reports for the uPay site. **Note:** Accountants cannot make any changes to uPay site settings or assign user roles.

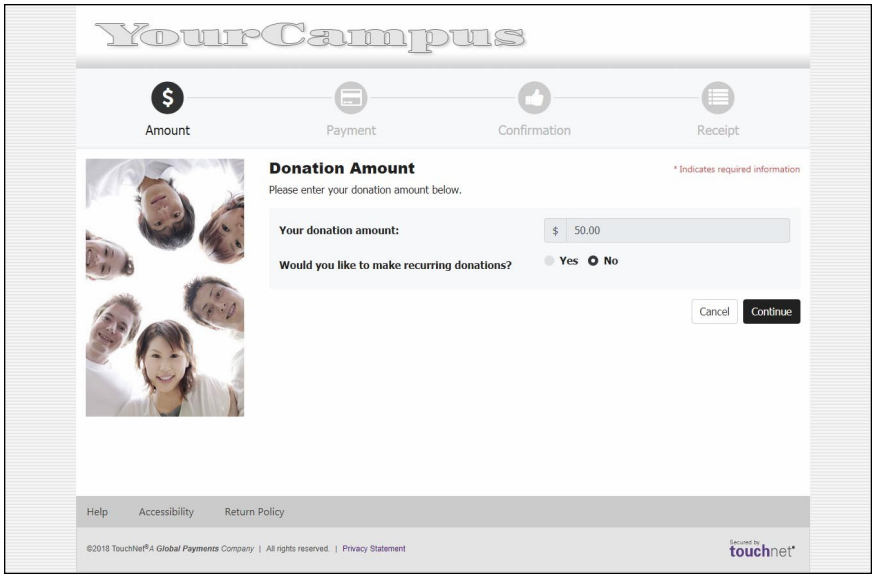
9.2 What uPay Customers See

This section describes what customers see as they proceed through the uPay payment process. These examples show the Designer template.

Payment Amount

The first thing customers see when they come to uPay is the Payment Amount page.

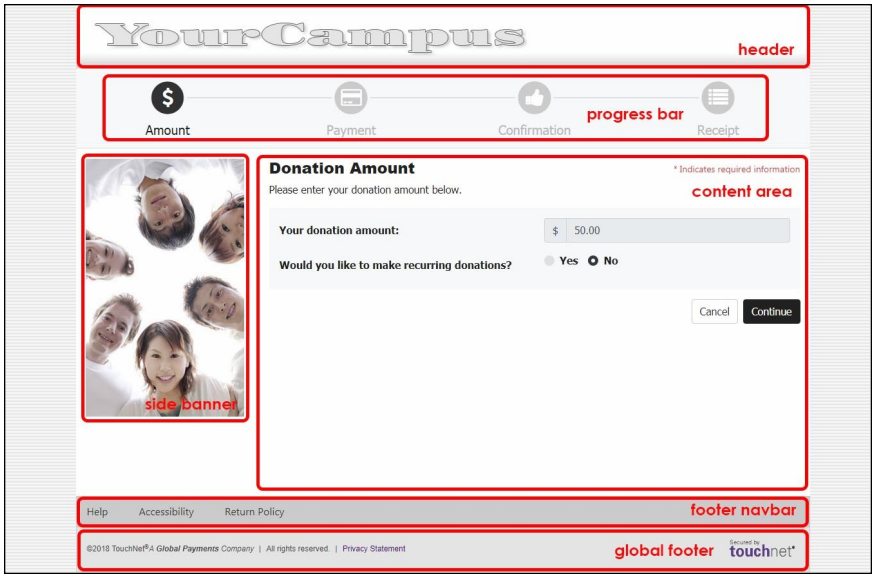
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The uPay Payment Amount fields.

The amount field may have been populated with a value from the campus web application that launched the uPay site. The recurring donations prompt is optional and depends upon how the uPay site was configured.

The following illustration shows the main areas of a uPay site.



The main content areas of a uPay payment page.

Many of the elements in the content area can be configured:

- **header**—You can upload a header image.
- **progress bar**—You cannot modify the progress bar.
- **side banner**—You can upload a side banner image.

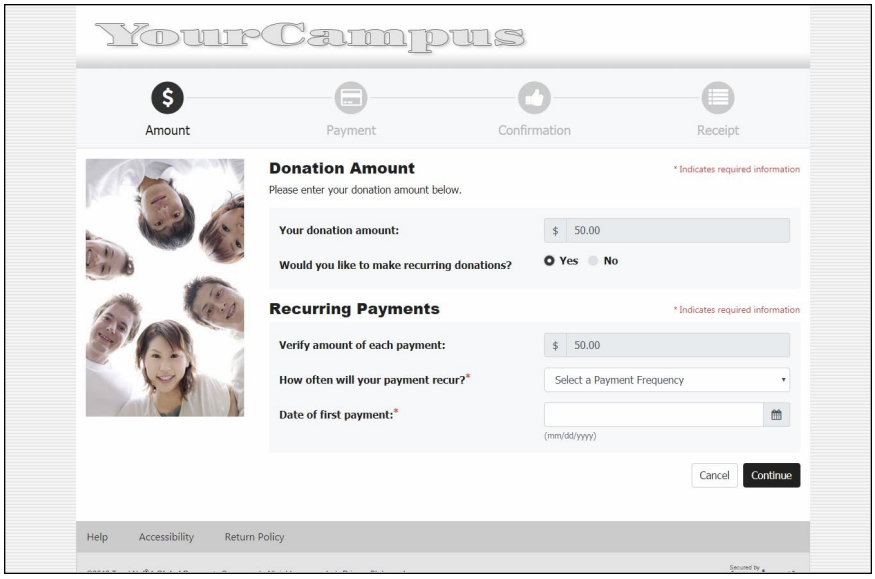
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- **content area**—You can modify several elements that appear in this area, such as the text that is used for the headings and the description text. You can also modify the font attributes and button colors.
- **footer navbar**—You can choose which links to include in the footer navbar, as well as the background color and border color.
- **global footer**—This area displays TouchNet information; however, you can modify the text color, link color, and background color.

Note: The background colors of the body and main content area can also be modified, and background images can be uploaded. For details on background modifications, see **"The Layout Tab" on page 1**.

Recurring Payments

If the uPay site was configured to accept recurring payments and the customer chose Yes for the recurring payments prompt, the recurring payments fields are added to the Payment Amount page:



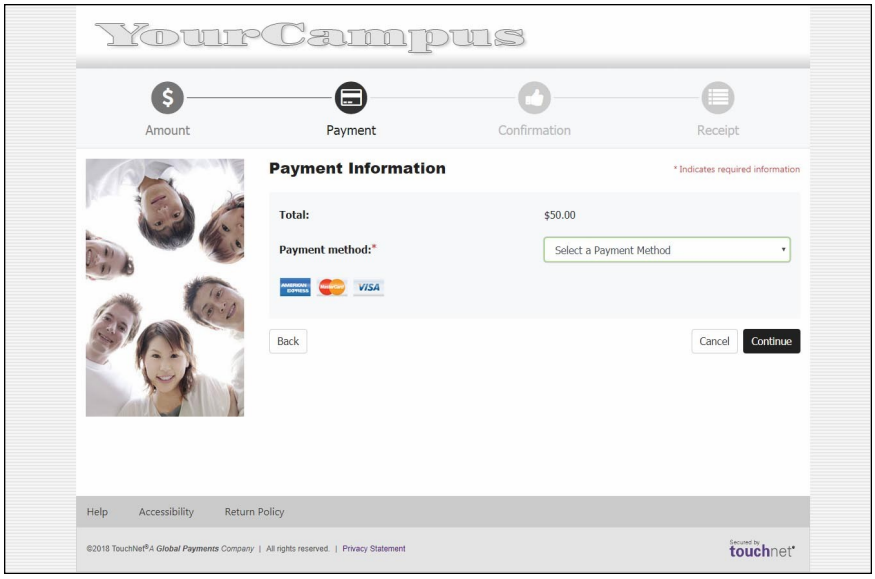
The recurring payments fields appear on the Payment Amount page.

Note: If the uPay site is configured to offer an Additional Donation, the Additional Donation page appears before the Payment Information page. However, if the uPay site is configured for recurring payments, the Additional Donation page is not displayed.

Payment Information

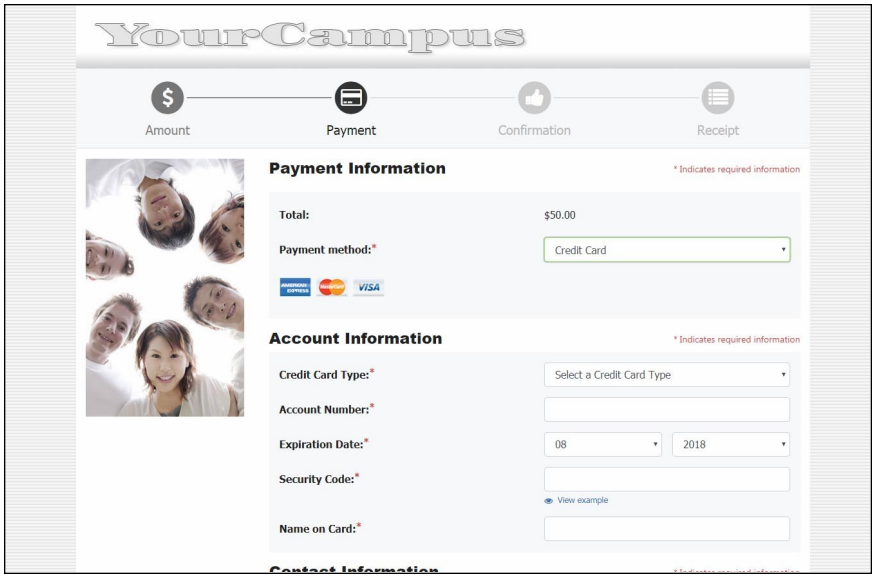
The Payment Information fields allow the customer to choose a payment type and enter the corresponding payment information.

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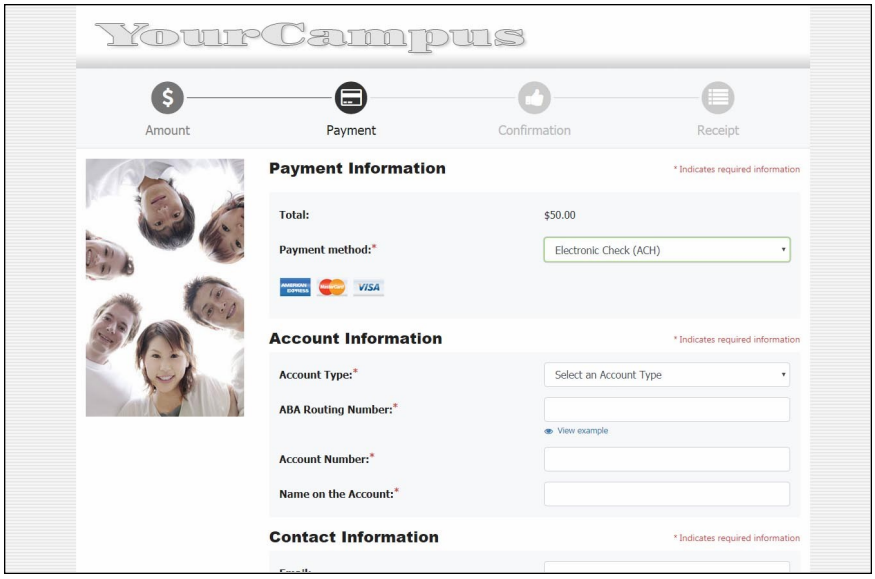
The customer chooses a payment method on the Payment Information page.

After the customer chooses a payment method, the corresponding fields for that payment method are then displayed.



If the customer chooses Credit Card as the payment method, the credit card fields are displayed.on the Payment Information page.

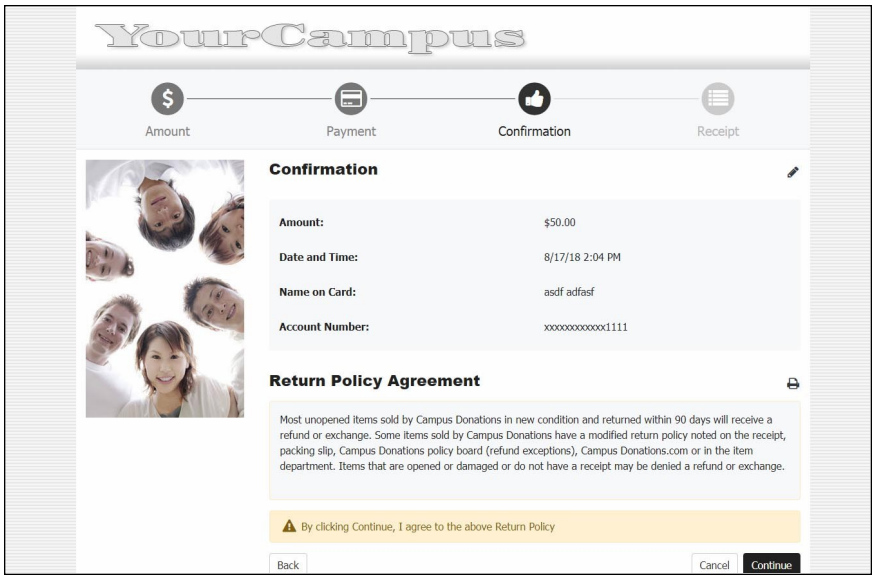
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If the customer chooses Electronic Check (ACH) as the payment method, the bank information fields are displayed.on the Payment Information page.

The Confirmation Page

The Confirmation page allows the customer to review the payment amount and payment information. Then the customer can approve the transaction.



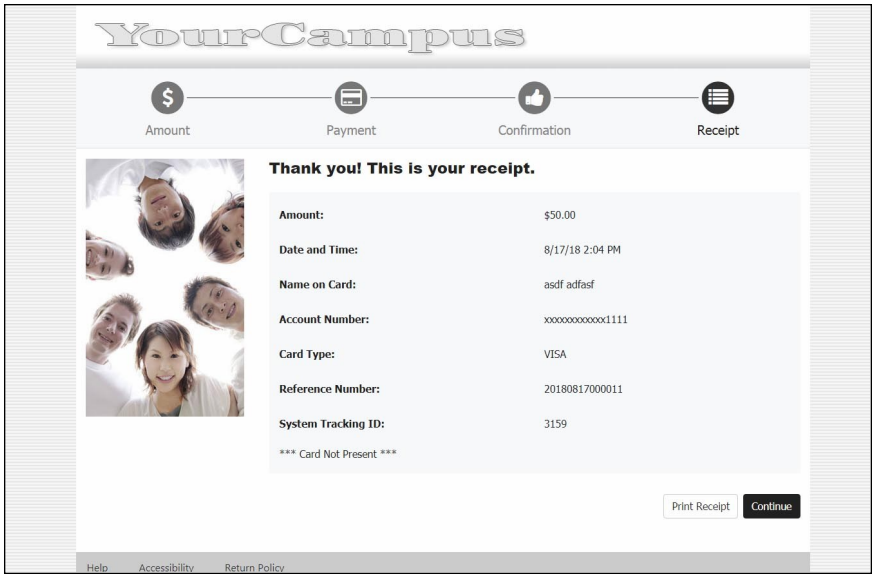
The customer can review the payment amount and payment information.

The Return Policy Agreement section only appears if the uPay site has been configured to display a return policy agreement.

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The Receipt Page

After the transaction has completed, the Receipt page is displayed.



A receipt is displayed to the customer after the transaction is finalized.

The customer can select the Print Receipt button to print the receipt.

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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 **"What uPay Customers See" on page 479**.)
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 486**.)
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 526**.)
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 555**.)
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 **"Using a Posting URL" on page 562**.)
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 552**.)

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

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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 payment cards, and it determines whether ACH payments can be 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 **"Merchant Accounting Codes" on page 120**.

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.

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 526** and **"Using a Posting URL" on page 562**.

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.

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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" on page 487**
- **"General Settings" on page 498**
- **"uPay Recurring Payments" on page 505**
- **"uPay E-mail Addresses" on page 606**
- **"Assign Site Manager" on page 511**
- **"Validate Settings" on page 511**

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 Visit the Site Template Setup pages to configure the layout for your uPay site, including the addition of images and the selection of colors for various page elements. See **"Layout Templates" on page 1**.

4 Visit the Form Parameters page to add parameters that will be passed to the uPay site from your campus web application, as well as learning about the standard form parameters. See **"Passing Parameters to Your uPay Site" on page 526**.

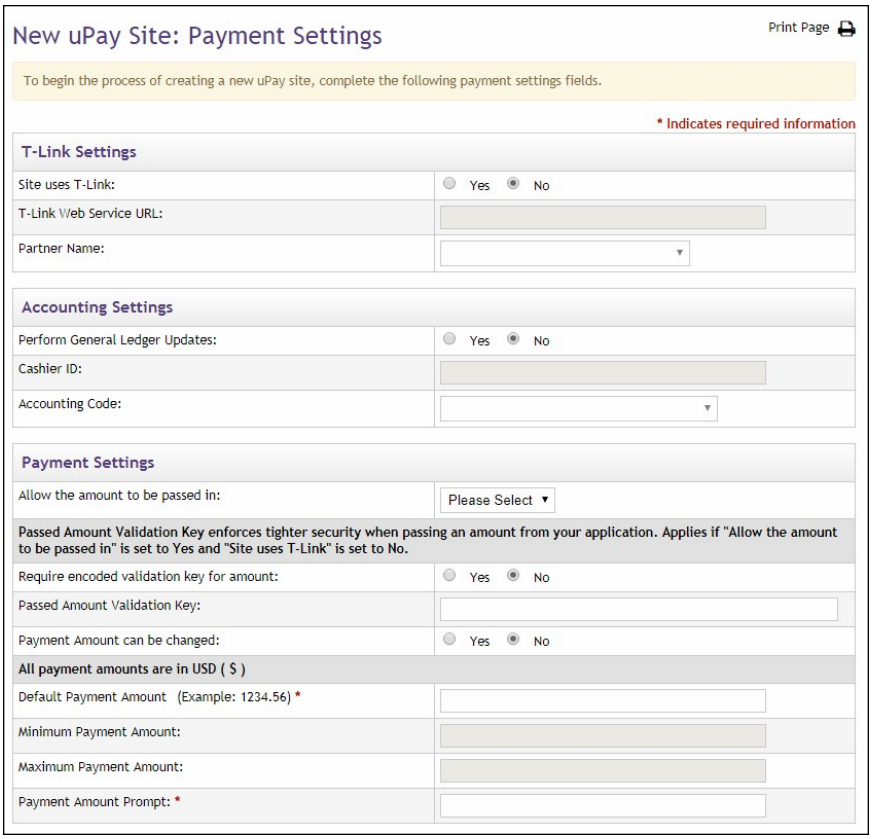
5 Visit the Additional Donations page to add an additional donation that will be offered to the customer during the uPay payment process. See **"Additional Donations" on page 543**.

6 After you have made all the necessary modifications to the uPay site, you can bring the site online, as described in **"Bringing Your uPay Site Online" on page 552**.

Payment Settings

The first 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.

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Field Definitions:

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.

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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 609 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 627.

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 662.

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, PeopleSoft, or Workday.

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Payment Settings

Allow the amount to be passed in

Marketplace requires that you make a selection for this field. 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. If you select No, uPay will not accept a transaction amount passed by the campus web application. If the uPay site has been configured with a Default Payment Amount, that amount will be used, although this amount can be changed if the Payment Amount Can Be Changed option is set to Yes.

Important! If you select Yes for this option, TouchNet recommends you also use the encoded validation key described below. For more information, see **"Using the VALIDATION_KEY Option" on page 555**.

Note: For more details about passing data to uPay, see **"How to Configure Parameters" on page 526**.

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 558** 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.

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- The campus web application must pass a dollar amount as an input parameter. (For more information, see **"uPay Parameter Details" on page 529**.)
- 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 529**.)
- 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 558**)

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 555**.

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.

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Minimum and Maximum Payment Amounts

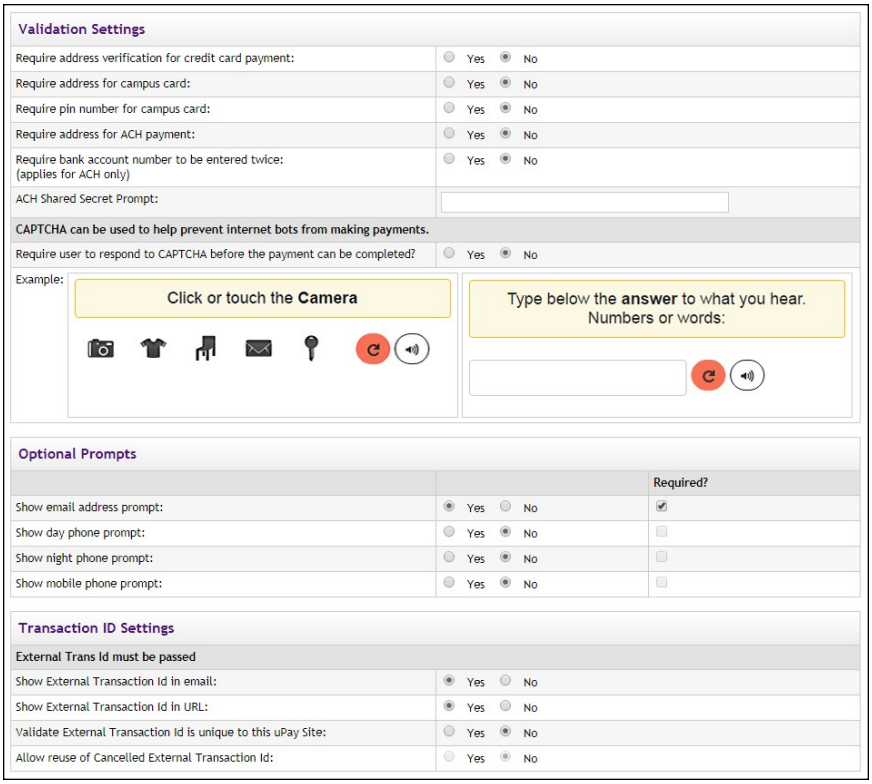
You can set minimum and maximum payment amounts. These amounts only apply if the "Allow the user to edit the payment amount" field is set to "Yes." If the user is not allowed to edit the payment amount, the Minimum Payment Amount field and the Maximum Payment Amount field have no affect.

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."



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Validation Settings

Require address verification for payment 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 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 payment 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 **"How to Configure Parameters" on page 526**.

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 **"How to Configure Parameters" on page 526**. 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

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Continue button. In either case, uPay treats clicking Continue as an agreement to the terms.

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 **"How to Configure Parameters" on page 526**.

Show day/night/mobile phone prompt?

If you select Yes, customers will see a prompt for the corresponding phone number types: day, night, and mobile. By default, these fields are set to Yes, but you can turn off the display of these fields if desired.

["Required?" column]

By default, the email address and phone fields are not required; however, you can make these fields required by selecting the corresponding checkboxes in the Required column.

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.

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.

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Show External Transaction ID in URL?

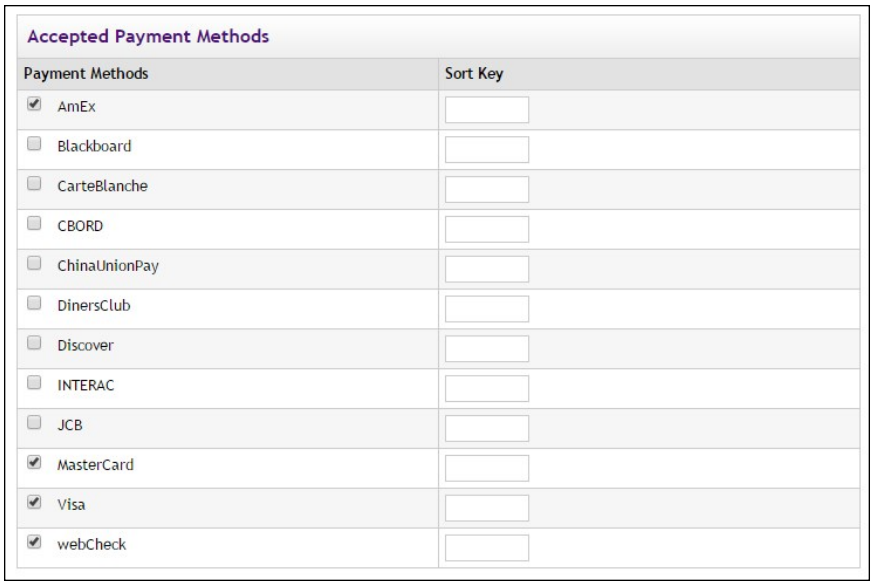
If you select Yes, the customers will see the external transaction ID as part of the URL for the cancel button, the success link, and the error link.

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.



You can establish the order that payment methods will be offered to customers by using the Sort Key fields.

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.

Campus cards and Interac can be used as payment methods for uPay sites; however, campus cards and Interac are not available with T-Link.

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You can determine the order that these payment methods will appear to customers by entering a sort order in the Sort Key fields.

Note: If Yes is selected for Site Uses T-Link in the T-Link Settings section of the uPay Payment Settings page, then campus cards are not available as payment methods.

Notes on Payment Methods

Marketplace uPay accepts payment cards, campus cards, Interac Online, and electronic check (ACH). In addition, Marketplace uPay accepts the digital wallet service Apple Pay. 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.

Payment cards accepted by Marketplace:

Payment Card Name	Name Displayed to Buyers
Mastercard	Mastercard
Visa	Visa
American Express	American Express
Discover Card	Discover
JCB	JCB
Diners Club International	DinersClub
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 payment 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.

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Important! The Discover Network requires that all merchants that accept the Discover Card must also accept Diners Club, JCB, 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	
OneCard	

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.

Note: If Yes is selected for Site Uses T-Link on the uPay Product Settings page, campus cards are not available as payment methods.

Other payment methods accepted by Marketplace:

Payment Method	Name Displayed to Buyers
ACH	Buyers see the name "Electronic Check (ACH)" while Operations Center users see the name "webCheck."
Interac Online	Online Payment via INTERAC.

Note: 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.interaconline.com.

Digital Wallets supported by Marketplace:

Name of Digital Wallet	Name Displayed to Buyers
Apple Pay	Apple Pay appears as a payment method option on the Payment Method page of uPay. Apple Pay only appears as an option for buyers who are using the Safari browser on an Apple device.

Buyers can select Apple Pay from the Payment Method dropdown list. When Apple Pay is selected, a pop-up window appears in which the buyer's Apply Pay profile is opened from the configuration on the Apple

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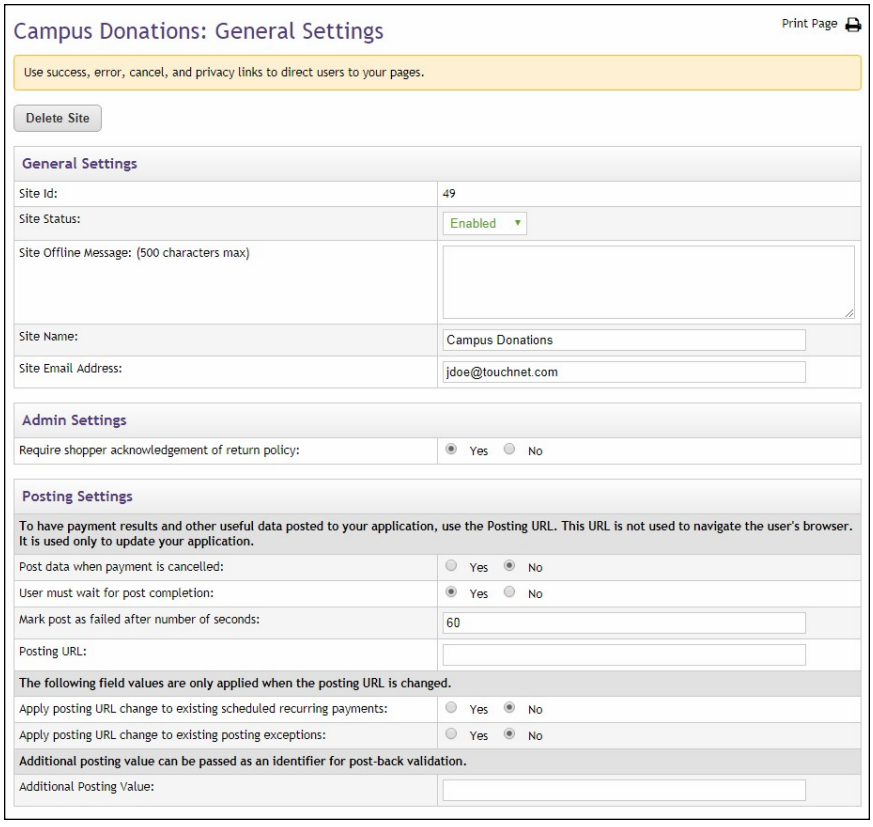
device. This profile on the Apple device must already exist in order for Apple Pay to be available as a payment method.

Also, in order to be available as a payment method, the Payment Gateway host system account for the Marketplace merchant must have been configured to include Apple Pay. There is no configuration within Marketplace that determines whether Apple Pay will be available beyond the selection of the Payment Gateway host system account.

Apple Pay does not appear as a payment method in the following situations: 1) when the user's shopping cart contains multiple items and two or more of those items have a different set of available payment methods, and 2) when the customer has chosen to use recurring payments.

General Settings

The next uPay setup screen is the General Settings screen, where you enter the site name, a contact e-mail address, posting settings, and other important information about your uPay site.



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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. Only enter one e-mail address in this field.

Admin Settings

Require shopper acknowledgment of return policy
Once this setting is turned on, a checkbox appears on the Confirmation page of the payment process. This checkbox says “By checking this box, you are agreeing to the Return Policy Agreement.” This configuration setting was added to fulfill a Visa/Mastercard regulation regarding return policies. Display of this checkbox is optional.

Posting Settings

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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 responded 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 enter the URL for that destination in the "Posting URL" field. For more information, see **"Using a Posting URL" on page 562**.

Note: TouchNet strongly recommends use of https with the Posting URL.

Subsequently, if you change the Posting URL, the following two fields become available.

Apply Posting URL Change to Existing Scheduled Recurring Payments

This option becomes availabe if you edit the Posting URL field. If you select Yes for this option, the posting URL saved for all existing scheduled recurring payments will be changed to your new entry. If you select No, the posting URL originally saved with each transaction will continue to be used when any currently scheduled recurring payments are processed (however, the new posting URL that you entered will be used with newly scheduled recurring payments).

Apply Posting URL change to Existing Posting Exceptions

If you select Yes for this option, the posting URL saved with posting exceptions will be updated with the new URL that you entered. Using this

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option can be especially valuable if posting exceptions exist because a campus web application started using a new posting URL—without the uPay site manager being notified. After you choose Yes, you can subsequently repost the posting exceptions. If you select No for this option, the posting URL originally saved with any existing posting exceptions will continue to be used.

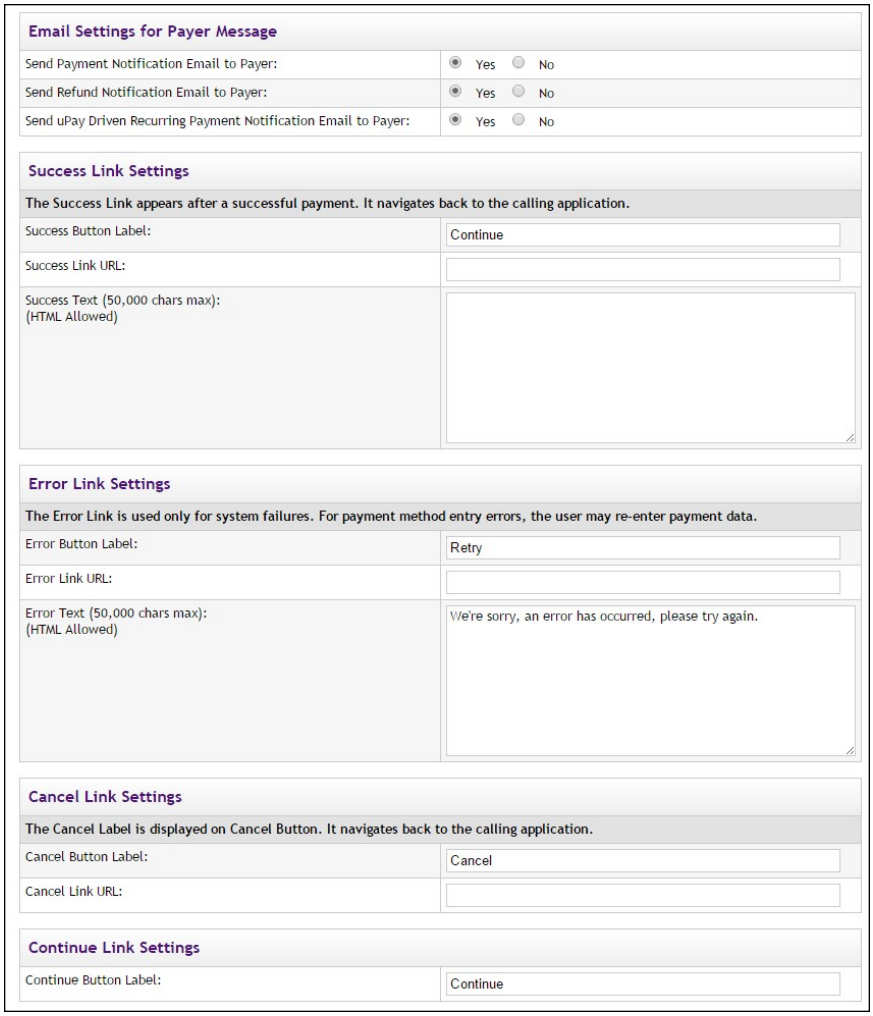
Additional Posting Value

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. In contrast, 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 555**.

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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. Set to Yes by default.

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Send Refund Notification Email to Payer

This field is very similar to the discussion above for the Send Payment Notifications Email to Payer field; however, this field is for refund notifications. Set to Yes by default.

Send uPay Driven Recurring Payment Notification Email to Payer

This field is very similar to the discussion above for the Send Payment Notifications Email to Payer field; however, this field is for recurring payment notifications. Set to Yes by default.

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. 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 usesT-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).

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 562**.

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.

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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.

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

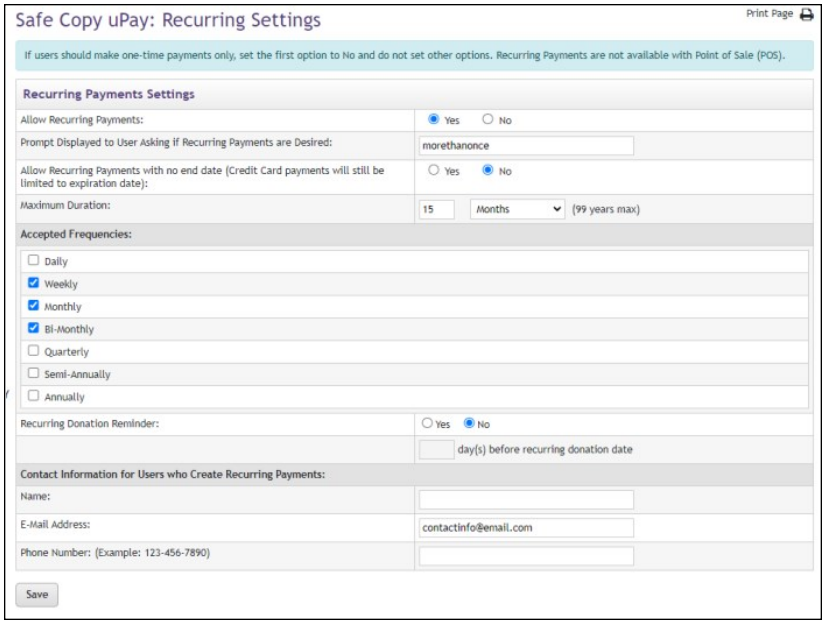
A "Continue" button appears throughout the uPay payment pages. Customers will select this button to record their entries on each page. You can modify the text that appears on this button by changing the value in this

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field. By default, this field originally contains the word "Continue"; however, you are in control of this value and can modify the button text.

uPay 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.



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.

About Passed Parameters for Recurring Payments

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 payment 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

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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.

Allow Recurring Payments with no end date

If you select Yes for this setting, customers will not be prompted for an end date when setting up recurring payments. The applicable end date will be the Maximum Duration or (if the customer is using a payment card) the payment card's expiration date.

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.

Note: Values passed with the RECURRING_NUMBER_OF_PAYMENTS parameter or the RECURRING_END_DATE parameter will override the value specified in the Maximum Duration field."Passing Parameters with an HTML Form" on page 540

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.

Recurring Donation Reminder

Your customers may appreciate receiving a recurring donation reminder message before each recurring payment is processed. To turn on recurring payment reminders, select Yes for Recurring Donation Reminder. Once you select Yes, you must also enter a number in the "day(s) before recurring donation date" field.

Note: The announcement message that appears in these recurring donation reminder messages can be configured on the Email Messages page, as described in **"Email Messages for uPay Sites" on page 507**. Make sure you

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have considered what this announcement will say before you select Yes for the Recurring Donation Reminder field.

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.

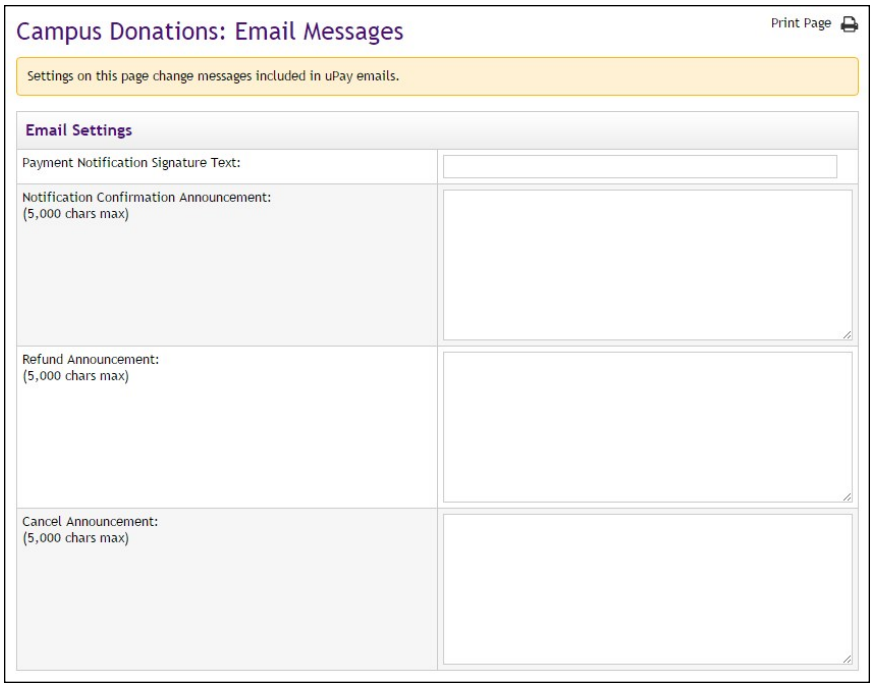
Note: This information is important for users because it provides them with a contact if they want to change or cancel recurring payments. uPay does not provide self-service options where users can change or cancel their own recurring payments.

Note: Saved payment profiles are used in uStores and uPay for recurring payments, delayed fulfillments, and for registered users. Marketplace will alert shoppers when a saved payment profile is being used for processing.

Email Messages for uPay Sites

The Email Messages page allows you establish the announcement statements that will appear on each e-mail message type.

To view the Email Message page, go to Marketplace Home > [Merchant] > uPay Sites > [uPay Site] > Email Messages. The Email Messages page then appears.



E-mail message announcements can be configured by using these fields.

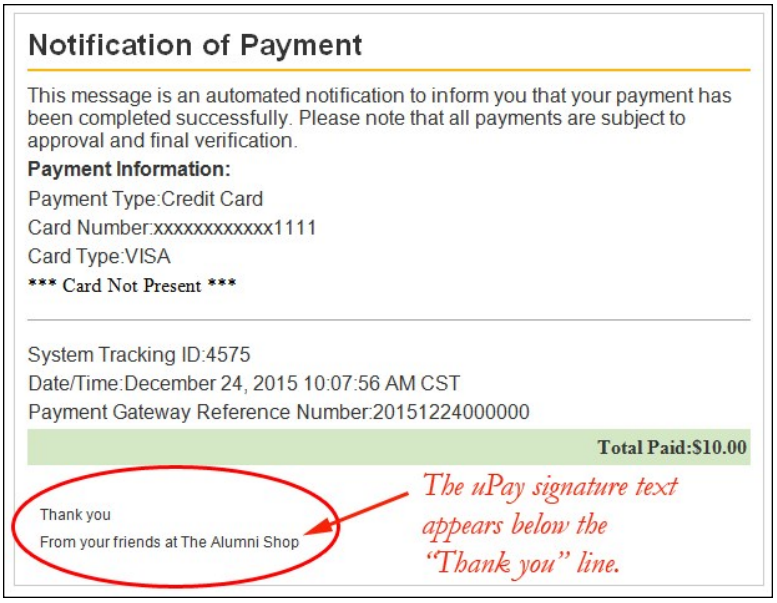
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Field Definitions:

Email Settings

Payment Notification Signature Text

The Payment Notification Signature Text appears as a single line at the bottom of uPay notification e-mail messages, immediately below the words "Thank you." If you make no entry in this field (the field is empty by default), then the uPay site name appears.

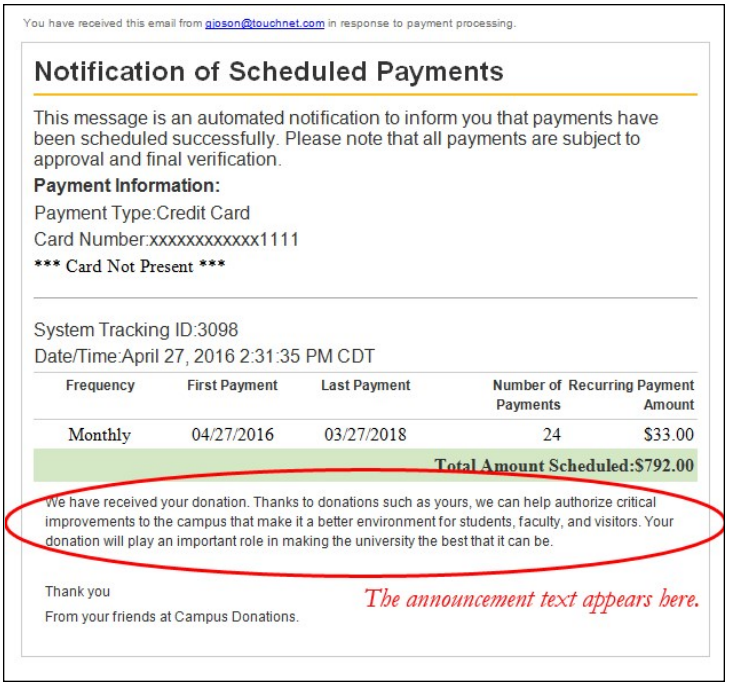


An example of a uPay payment notification e-mail message.

In the above example the uPay site name is "Alumni Shop"; however, the uPay site manager has configured the signature text to say "From your friends at The Alumni Shop" instead.

This field does not accept HTML. Your entry will appear as a single line without any formatting or line breaks. (100 characters max.)

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An example of an announcement in a uPay e-mail message.

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. This field accepts a maximum of 5,000 characters. HTML is not allowed in this field. Your entry will appear as a single line without any formatting or line breaks.

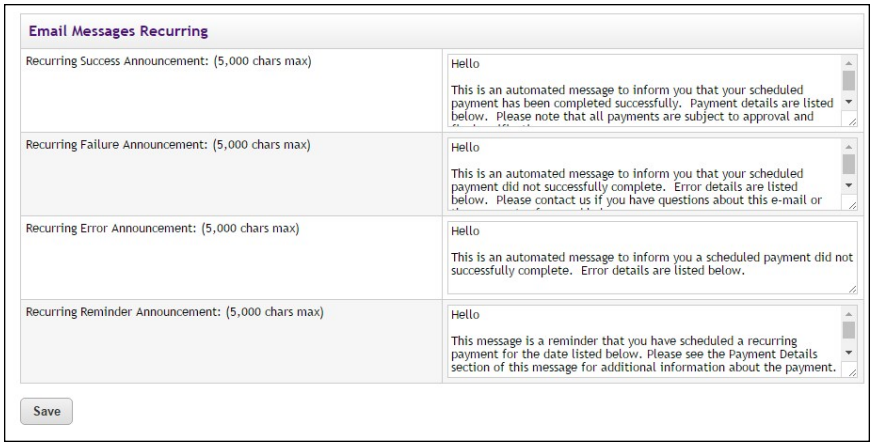
Refund Announcement

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.

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Separate announcements can be configured for uPay recurring payments.

Email Messages Recurring

Recurring Success Announcement

This announcement text appears in e-mail confirmation messages when a uPay recurring payment was processed successfully. Use this announcement field to enter a paragraph that tells customers their recurring payment was received. This field accepts a maximum of 5,000 characters. HTML is not allowed in this field. Your entry will appear as a single line without any formatting or line breaks.

Recurring Failure Announcement

This announcement text appears in e-mail confirmation messages when Marketplace attempts to process a recurring payment and the payment fails. Use this announcement to enter a paragraph that tells customers their recurring payment was not successfully processed. This field accepts a maximum of 5,000 characters. HTML is not allowed in this field.

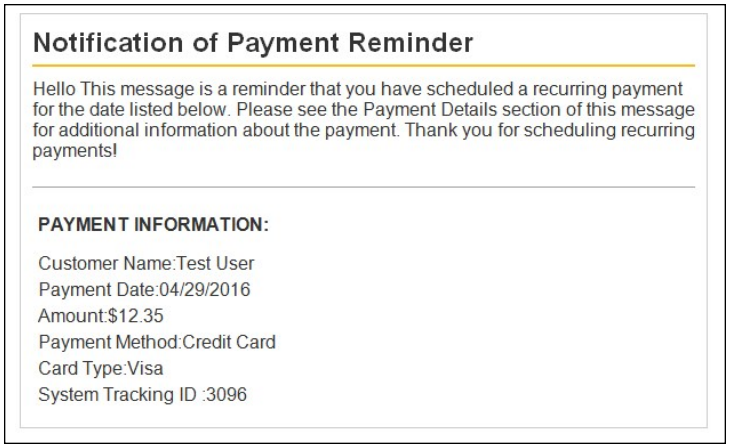
Recurring Error Announcement

This announcement text appears in e-mail confirmation messages when Marketplace encounters an error regarding a recurring payment. This message is NOT sent to the customer. Instead, this message is sent to a Marketplace administrator. The destination e-mail address for these mesages is configured in the *tmsrecur.prp* file and was established when Marketplace was installed. If you need to change this e-mail address, please contact TouchNet Customer Care. This field accepts a maximum of 5,000 characters. HTML is not allowed in this field.

Recurring Reminder Announcement

This announcement text appears in recurring payment reminder messages (which can be turned on by using the the Recurring Donation Reminder field, as described in **"uPay Recurring Payments" on page 505**).

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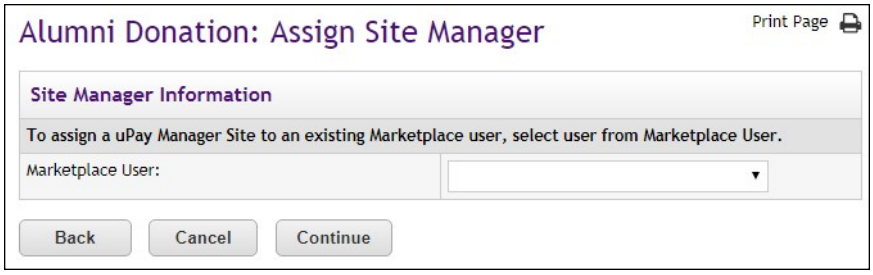


An example of a recurring payment reminder message.

Use this announcement field to enter a paragraph that tells customers that they have a recurring payment scheduled to take place. This message appears directly below the message heading. The customer name, payment date, and the payment amount appear in the Payment Information section. This announcement field accepts a maximum of 5,000 characters. HTML is not allowed in this field.

Assign 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.Commerceuser as the uPay site manager.

Validate Settings

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.

A "uPay Site Creation Successful" page then appears, and this page offers users the ability to continue with additional site configuration settings. The following options are displayed:

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- **Site Template Setup**
  For more information, see **"Layout Templates" on page 1**.
- **Add Form Parameters**
  For more information, see **"Passing Parameters to Your uPay Site" on page 526**.
- **Create Additional Donation**
  For more information, see **"Additional Donations" on page 543**.

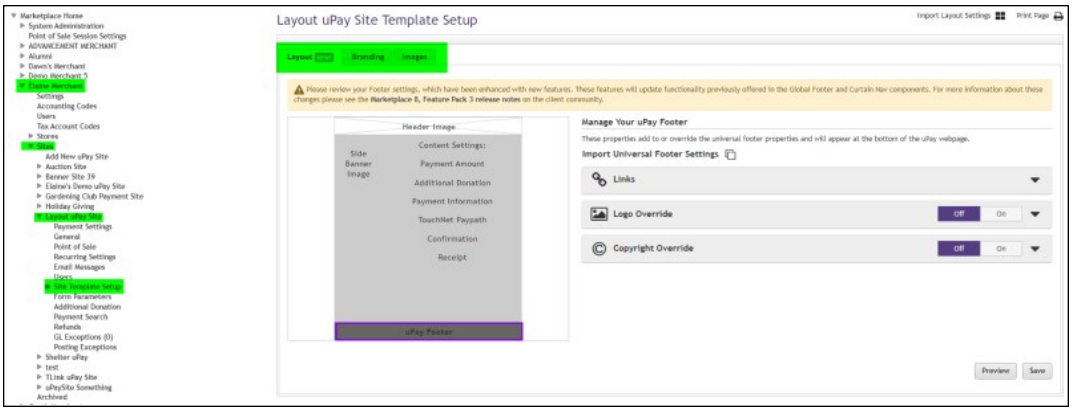
10.3 uPay Layout Templates

For the uPay Site Template setup, you can choose background colors, font sizes, font families, border colors, and other attributes; plus, you can upload images, add custom content (HTML), and add custom styles (CSS).

Marketplace allows you to take control of how your uPay site is branded. uPay layout templates break down the layout into the various components that appear on site pages—such as the Header Image, the Side Banner Image, the Content area, and the uPay Footer—and then provide configuration settings for each component.

With Marketplace Feature Pack 8.3, the uPay Site's Layout and Branding tabs allow the configuration of a site specific footer component, that overrides the Universal or Mall template, or the creation of a custom template for Marketplace uPay Sites.

To access the uPay Site Template Setup select the desired Merchant, click Sites > [desired site] > Site Template Setup. The Site Template Setup page appears. The New Layout tab, Branding tab and Images tab appear.



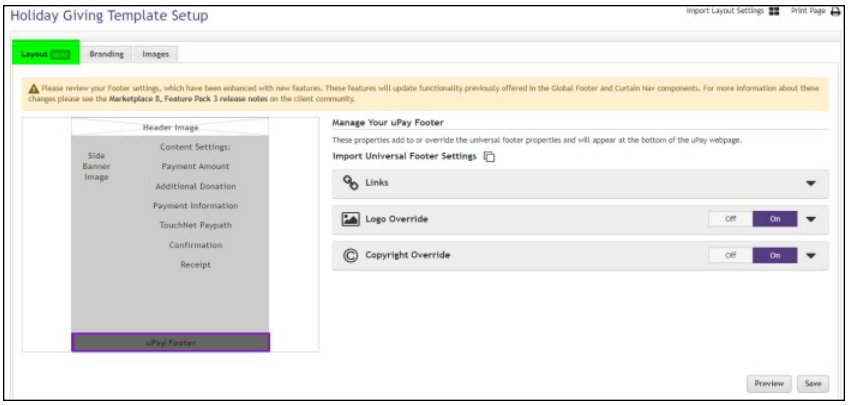
Selecting a Template

uPay site managers (and merchant managers) can configure the layout templates for a uPay site. To get started using a layout template (or to modify an existing template), a user with the site manager or merchant manager role can navigate to the following destination in the Operations Center:

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[Merchant Name] > uPay Sites > [uPay Site Name] > Site Template Setup

The uPay Site Templates page then appears.



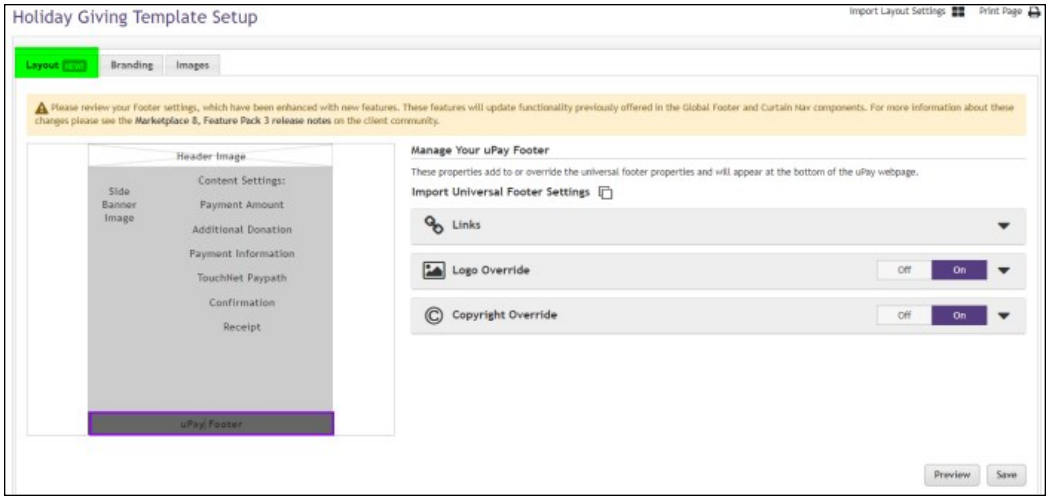
Layout Tab (New): Managing your uPay Footer

Settings that can be configured for uPay are:

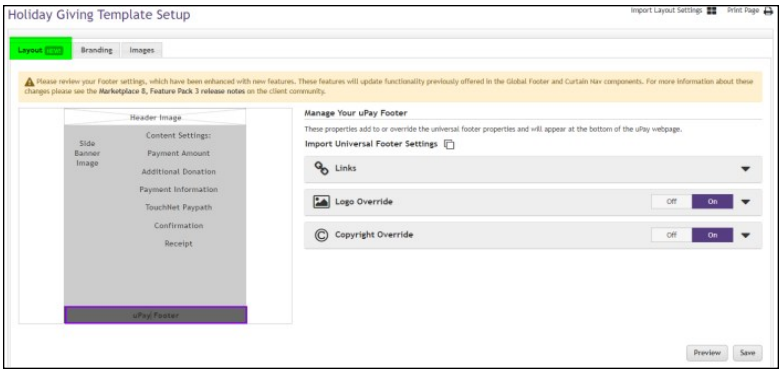
- Overrides for the Mall (or Universal, whichever is enabled) footer's privacy policy and miscellaneous policy links.
- Override for the Mall (or Universal, whichever is enabled) footer's logo and copyright statements. Note: if these properties are turned "off" on the layout tab then they will not be displayed on the uPay site, even if a logo or copyright statement is loaded for the universal layout or mall layout.
- Links for Return Policy Content and Help will be moved from the footer navbar to the footer. When configured these links will appear in the footer component.
- New "Contact Us" link will be available for uPay sites. This email address will be used for customer questions generated from the uPay site only.
- Sort order of these links will be set at the uPay site level using drag and drop.

Note: Footer navbar settings for the stores will be automatically transferred and enabled as a Custom uPay template upon FP8.3's installation for existing schools. Schools will be able to access and update these controls after implementation as they desire.

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This tab contains a graphical representation of the Designer layout. As you move your mouse over each component, a black outline will appear around each component that can be configured.



The Layout tab

Provides the ability to import layout settings from other uPay sites, including uPay sites from other merchants and uPay sites that use the Classic template. The option is available on the Marketplace Template Setup page for the Designer: Fixed Width Layout. Look for the "Import Layout Settings" option.

You can click on the various components to see the related configuration settings—which appear to the right of the clickable graphical representation. The following sections describe the various components that can be configured by using the Layout tab.

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The Layout Tab: Import Layout Settings

The Import Layout Settings link can be found in the upper right corner of the template setup page. This link provides you with a means for taking the layout of an uPay site and importing that layout into another store. This layout can come from any uPay site that the user has access to, not just the uPay sites for the same merchant.

It allos you to import layout settings from other uPay sites, even from sites that use the Classic template.

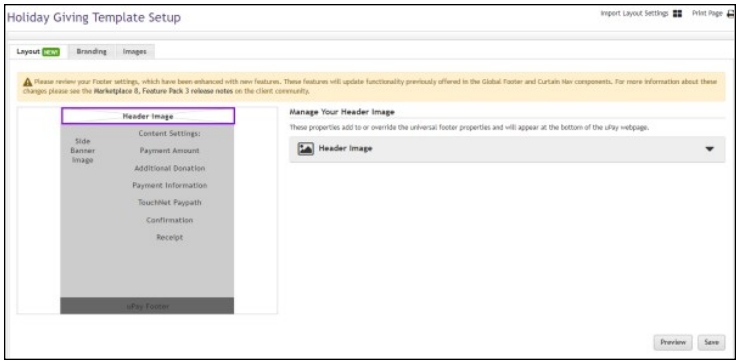
When you click the Import Layout Settings icon, a list of the available uPay sites appears in a dropdown menu. The top of the list shows all uPay sites with Designer Template. If any uPay sites use the Classic Template, those uPay sites are listed in the second part of the dropdown menu.

Remember to select the Save button to save the imported settings.

Important! When you import layout from uPay sites that use the Classic layout template, not all portions of the classic template are applicable to the Designer template. You should review the imported settings to determine if the settings are still relevant and provide the desired result.

The Layout Tab: Managing Your Header Image

This panel contains functionality that allows you to upload an image that will be displayed in the header area for your uPay site. All uPay sites should use a header image.



A header image can be uploaded.

Select the Upload Image button to launch the Image Upload dialog, from which you can choose an image file from a local or network location. After the image file is uploaded, the image will appear in the Image Preview area. (You can delete the uploaded image, if necessary, by selecting the trash can icon.)

Additional setting:

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- **Alternate Text**—This field is required after you upload an image. Your entry in this field will be displayed to customers in those cases in which the image cannot be displayed. For example, a sight-impaired user with a screen reader would hear the Alternate Text entry read to them.

The Layout Tab: Managing Your Side Banner Image

This panel contains functionality that allows you to upload an image that will be displayed on the left side of the main content area, below the header and above the footer. Use of a side banner is optional.

Otherwise, this panel is very similar to the Header Image panel, so please see that description above for more information about the other fields.

The Side Banner image may be a maximum of 400 pixels wide by 400 pixels high.

The Layout Tab: Managing Your Content Settings

These fields exist so that you can customize text that appears on the uPay site pages. By customizing this text you can create messaging that better fits the needs of your customers. Each of the content areas has the following fields:

- **Heading**—This entry will appear at the top of the corresponding content area as a heading.
- **Enter [content area name] Content**—This entry will appear immediately below the heading for the corresponding content type. You can use this field to enter additional information that your customers may need. (See the description below regarding how to use the Custom Content field.)
- **Enter [content area name] Styles**—This entry allows you add CSS that will be used by the Content field described above.

Each "Enter [content area name] Content" field includes a large text entry area and a toolbar with various buttons that can be used for adding formatting. You can use the buttons to add styling, images , tables , horizontal lines  , hyperlinks  , numbered lists  , bulleted lists  , or block quotes  .

Note: When you select the image  button, you will be asked for the URL for the image. This URL can reference an image on an external server, or it can point at an image that you have already uploaded for use with Marketplace. See **"The Images Tab" on page 525** for more information about URLs/paths.

You can use the Source button  to view the HTML code that will be used for the message. You can edit this HTML or add new HTML. The HTML that

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you enter can reference images. You can upload images by using the Images tab of the Designer template.

Any HTML entered in the Custom Content field can utilize CSS that you enter in the "Enter [content area name] Styles" field.

The Enter Custom Content field accepts up to 50,000 characters.

When you select the Save button, a validation process takes place. Any HTML code that Marketplace considers to be invalid will not be accepted. A list of errors will be returned. You must fix these errors (or allow the suggested changes) before Marketplace will accept your entry in the Enter Custom Content field. We recommend you become proficient in authoring HTML before you attempt to enter HTML is this field.

For more information about the allowed HTML code, see the *Security Validation Guide*.

The following message areas can be edited for your uPay site:

- **Payment Amount**—These fields will be used with the payment amount fields. Enter values in these field that will be appropriate for your audience. For example, if your uPay site is for donations, you might write "Your Donation" for the Heading field and "Please enter your donation amount" in the "Enter Payment Amount Content" field.
- **Additional Donation**—This message will appear as a section title above the Additional Donation fields, if you have configured an additional donation to be used with your uPay site. You might write, "An Additional Donation Offer" in the Heading field and "Please consider the following offer" in the "Enter Additional Donation Content" field.
- **Payment Information**—This message will appear above the fields that ask for the customer to enter their payment information (such as credit card information or bank account information) for the customer's selected payment method. You might write "Your payment information" in the Heading field and "Please enter your payment information" in the "Enter Payment Information Content" field.
- **TouchNet PayPath**—These fields with be used with the Terms & Conditions for PayPath (if PayPath has been licensed and if the PayPath payment method is avaible with the Host System Account). The Link Label field provides the text that will be used with the link to the Terms & Conditions page, while the Link URL provides the URL for the Terms & Conditions web page.
- **Confirmation**—This message will appear above the fields that ask for the customer to confirm to donation amount and payment information. You might write "Confirmation" in the Confirmation field and "Please confirm your donation amount and payment information" in the "Enter Confirmation Content" field.
- **Receipt**—This message will appear on the receipt page. You might write, "Thank you. Please print this receipt for your records." The receipt settings also include a "Success Message" and an "Error

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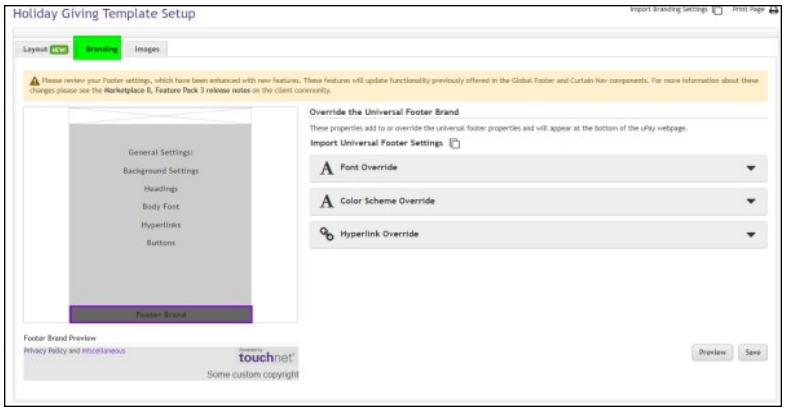
Message."The Success Text appears in a box near the top of the uPay receipt page.You can use this text to convey a message to the customer. The Success Text field does not appear if you selected Yes for "Site uses T-Link" on the uPay Payment Settings page. By default, this field originally contains the following text: "Thank you for your payment."; however, you are in control of this value and can modify the text. Likewise, the Error Message 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.

The Branding Tab

With Feature Pack 8.3, the branding tab allows you to override the Universal Footer properties that appear at the bottom of the uPay webpage. Settings that can be configured are:

- Overrides for the Mall (or Universal, whichever is enabled) footer's font family, color schemes and hyperlink color schemes.
  - **Existing customers as of FP8.3**: If Mall footer and/or branding layout is desired then remove the site layout and branding configurations or import the universal footer settings so that the Mall or Universal footer layout and branding links will be used. ***Note:*** when the universal footer settings are used instead of the uPay site, you will need to re-import anytime the universal footer changes.
  - If "custom" settings are desired then update the settings with custom content, URLs or logos.

This tab contains a graphical representation of the Designer layout. As you move your mouse over each component, a black outline will appear around each component that can be configured. You can click on the various components to see the related configuration settings.



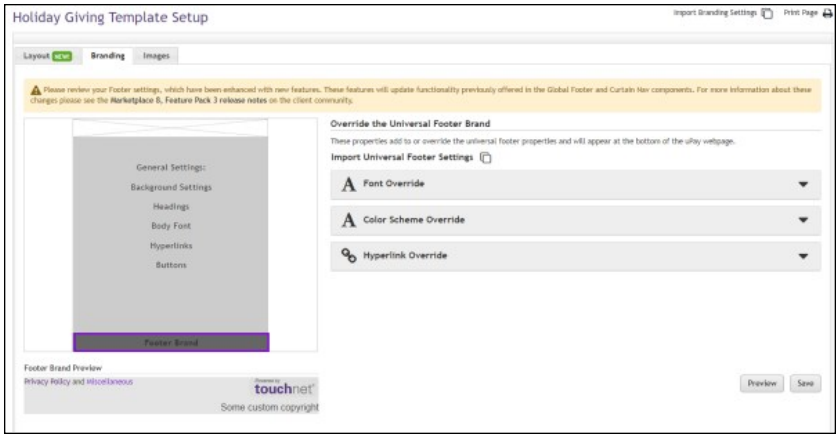
The Branding tab.

After you click a component, the options for that components appear on the right side of the tab. Plus, a Preview image appears below the graphical representation of the template on the left.

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The Branding Tab: Override the Universal Footer Brand

The Footer Brand options allow you to add to or override the Universal Footer properties that appear at the bottom of the uPay webpage.



The Footer Brand options

The Branding Tab: Import Branding Settings

The Import Branding Settings option is available from the upper right corner of the uPay Template Setup page when the Branding tab is selected.

When you select the Import Branding Settings icon, a dropdown list appears that lists all the uPay sites that use the Designer template for which the user has access. When you select one of these uPay sites, the settings on that site's Branding tab will be imported to the active uPay site. (You can also use the Restore Default Branding to reset branding settings.)

Remember to select the Save button to save the imported settings.

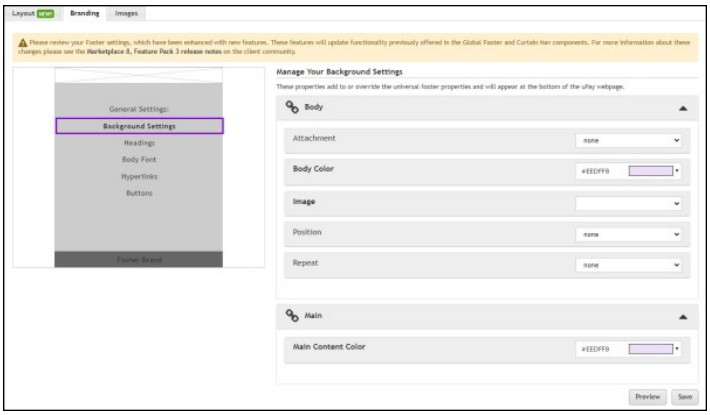
Note: The background image (as configured in the Background Settings) will be copied to the destination uPay site unless a file with the same filename has already been uploaded. In this situation, the existing file will be retained.

The Branding Tab: Managing Your Background Settings

The Background Settings affect the background color and image that are used with your uPay site. The "Body" area spans the entire width of the browser while the "Main Content" area is a fixed 1170 pixels wide and centered horizontally on the page.

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To add or edit the Background settings, select the Background Settings area on the Branding tab. The Build Your Background Settings options then appear.



The Build Your Background Settings options.

The following options are available:

- **Body Attachment**—This option determines how the Body Image (optional) will be attached to the page. Of the options available, "none," "scroll," "inherit," "local," and "initial" typically have the same affect: the background image will scroll with the rest of the page. However, "fixed" causes the background image to stay in the same position regardless of whether the page is scrolling (so the page contents will scroll over the "fixed" background image). For people familiar with CSS, this option is the same as "background-attachment" on the Body element.
- **Body Color**—You make your Body Color selection by using a color picker tool. This tool is activated when you choose the down arrow. The color picker tool also allows you to enter colors in hexadecimal format (e.g., #FFFFFF for white or #E6E6E6 for grey). For people familiar with CSS, this option is the same as "background-color" on the Body element.
- **Body Image**—Click this field to see a list of your uploaded images. Select the image that you would like to use as the background image. For people familiar with CSS, this option is the same as "background-image" on the Body element. (If you have not yet uploaded an image, go to the Images tab and upload your background image. Then return to the Branding tab.)
- **Body Position**—This option determines where the Body Image (optional) will be attached to the page.
  - **none**—Same as "left top."
  - **left top**—The left edge of the image is placed against the left ledge of the browser window. The top of the image is placed against the top edge of the browser window.

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- **left center**—The left edge of the image is placed against the left ledge of the browser window. The vertical center of the image is placed at the vertical center of the browser window.
- **left bottom**—The left edge of the image is placed against the left ledge of the browser window. The bottom of the image is placed against the bottom edge of the browser window.
- **right top**—The right edge of the image is placed against the right ledge of the browser window. The top edge of the image is placed against the top edge of the browser window.
- **right center**—The right edge of the image is placed against the right edge of the browser window. The vertical center of the image is placed at the vertical center of the browser window.
- **right bottom**—The right edge of the image is placed against the right edge of the browser window. The bottom of the image is placed against the bottom edge of the browser window.
- **center top**—The horizontal center of the image is placed at the horizontal center of the browser window. The top of the image is placed against the top edge of the browser window.
- **center center**—The horizontal center of the image is placed at the horizontal center of the browser window. The vertical center of the image is placed at the vertical center of the browser window.
- **center bottom**—The horizontal center of the image is placed at the horizontal center of the browser window. The bottom edge of the image is placed against the bottom edge of the browser window.
- **initial**—Same as "left top."
- **custom X-axis & Y-axis**—You can enter a location with a pixel value or a percentage. The top left corner of the browser window is considered 0 on the X-axis and 0 on the Y-axis. The distance is figured from the default "left top" location.

For people familiar with CSS, this option is the same as "background-position" on the Body element.

- **Body Repeat**—This option determines how the Body Image (optional) will be attached to the page.
  - **none**—Same as "repeat."
  - **repeat**—The image will repeat in both the x (horizontal) and y (vertical) directions and therefore tile across the entire browser window.
  - **repeat-x**—The image will repeat only in the x (horizontal) direction.
  - **repeat-y**—The image will repeat only in the y (vertical) direction.
  - **no-repeat**—The image appears only once and will not repeat in either the x (horizontal) or y (vertical) directions.

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- **initial**—Same as "repeat."
- **inherit**—Same as "repeat."

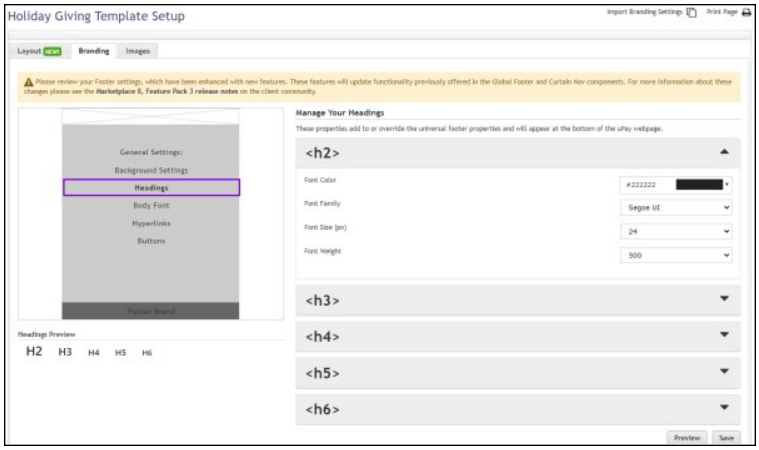
For people familiar with CSS, this option is the same as "background-repeat" on the Body element.

- **Main Content Color**—You make your Main Content Color selection by using a color picker tool. This tool is activated when you choose the down arrow. The color picker tool also allows you to enter colors in hexadecimal format (e.g., #FFFFFF for white or #E6E6E6 for grey).

The Branding Tab: Managing Your Headings

The Headings options affect text in the main content area. These settings affect all pages in the uPay site.

Separate sections appear for headings <h1> through <h6>. Heading <h1> is the largest heading and <h6> is the smallest. For each heading size that you would like to edit, select the down arrow to the right of the corresponding option name. The available options then appear.



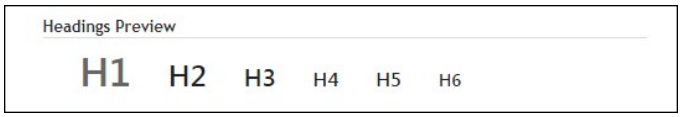
The Build Your Headings settings.

The following options are available for each heading size:

- **Font Color**—You make your Font Color selection by using a color picker tool. This tool is activated when you choose the down arrow to the right of the displayed color. The color picker tool also allows you to enter colors in hexadecimal format (e.g., #FFFFFF for white or #E6E6E6 for grey).
- **Font Family**—Choose a font from the drop-down list.
- **Font Size**—Choose a font size from the drop-down list. The sizes are in pixels, from 1 to 48.
- **Font Weight**—Choose a font weight from the drop-down list. Choices include normal, bold, bolder, and lighter. Numeric font weights are also available for greater control. For example, 400 is normal and 700 is bold.

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As you make changes to the Headings options, the Preview image will show you the result of the changes that you have entered.



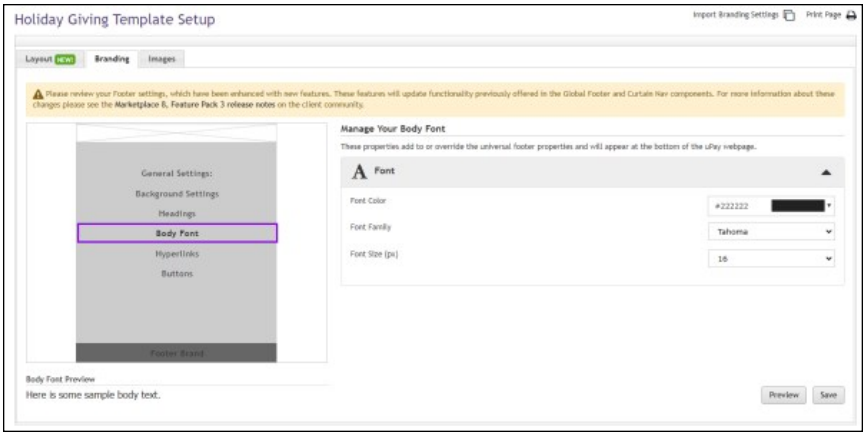
The Headings Preview.

Note: Your uPay site uses the <h2> heading for its page headings. The other headings (<h1> & <h3> through <h6>) can be used by your entries in the custom content fields.

The Branding Tab: Managing Your Body Font

The Body Font options affect the standard body text in the main content area. These settings affect all pages in your uPay site.

To edit the Body Font, select the Body Font area on the Branding tab. The Build Your Body Font options then appear.



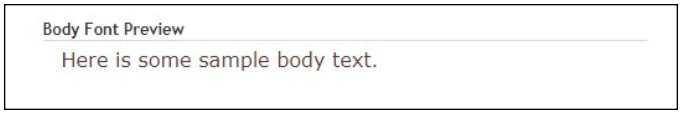
The Build Your Body Font options.

The following options are available:

- **Font Color**—You make your Font Color selection by using a color picker tool. This tool is activated when you choose the down arrow to the right of the displayed color. The color picker tool also allows you to enter colors in hexadecimal format (e.g., #FFFFFF for white or #E6E6E6 for grey).
- **Font Family**—Choose a font from the drop-down list.
- **Font Size**—Choose a font size from the drop-down list. The sizes are in pixels, from 1 to 48.

As you make changes to the Body Font options, the Preview image will show you the result of the changes that you have entered.

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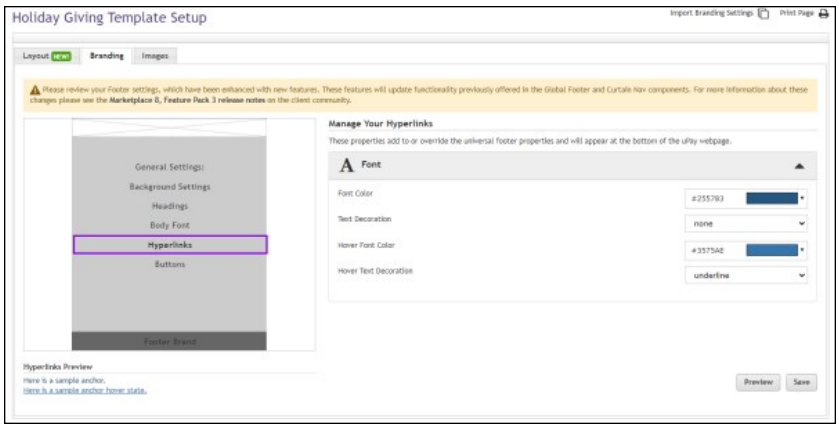


The Body Font Preview.

The Branding Tab: Managing Your Hyperlinks

The Hyperlinks options affect hyperlinks on pages throughout your uPay site. (Hyperlinks can be added through customization of the content fields on the Layout tab.)

To edit the Body Font, select the Hyperlinks area on the Branding tab. The Build Your Hyperlinks options then appear.



The Build Your Hyperlinks options.

The following options are available:

- **Font Color**—You make your Font Color selection by using a color picker tool. This tool is activated when you choose the down arrow to the right of the displayed color. The color picker tool also allows you to enter colors in hexadecimal format (e.g., #FFFFFF for white or #E6E6E6 for grey).
- **Text Decoration**—This option can be used to determine whether hyperlinks should be underlined.
- **Hover Font Color**—You make your Hover Font Color selection by using a color picker tool. This tool is activated when you choose the down arrow to the right of the displayed color. The color picker tool also allows you to enter colors in hexadecimal format (e.g., #FFFFFF for white or #E6E6E6 for grey).
- **Hover Text Decoration**—This option can be used to determine whether the hover state for hyperlinks should be underlined.

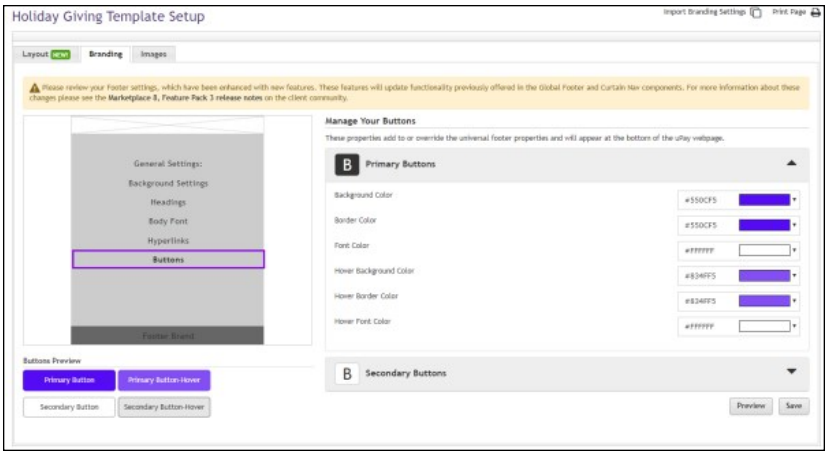
As you make changes to the Hyperlinks options, the Preview image will show you the result of the changes that you have entered.

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The Branding Tab: Managing Your Buttons

The Buttons options determine how buttons are displayed on pages throughout your uPay site. Options are available for two types of buttons: Primary Buttons and Secondary Buttons. For example, the Continue button is a Primary Button. Meanwhile, the Back, Cancel, and Print Receipt buttons are Secondary Buttons.

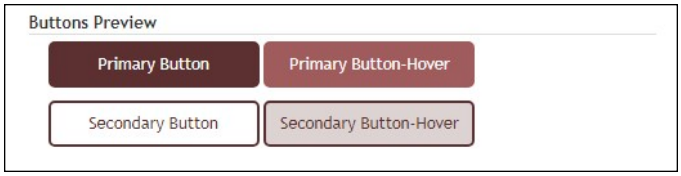
To edit the display options for buttons, select the Buttons area on the Branding tab. The Build Your Buttons options then appear.



The Build Your Buttons options.

The button options affect the color of the button—its background, its border, and the button text. Separate colors are available for the normal state and the hover state. You make your color selections by using a color picker tool. This tool is activated when you choose the down arrows beside each corresponding button part. The color picker tool also allows you to enter colors in hexadecimal format (e.g., #FFFFFF for white or #E6E6E6 for grey).

As you make changes to the Buttons options, the Preview image will show you the result of the changes that you have entered.



In this example, the background color changes for the hover state of both the Primary Button and the Secondary Button.

The Images Tab

This tab allows you to upload, manage, and preview images. These images can be used with fields that support HTML or CSS. Examples of HTML fields: any of the Content Settings fields on the Layout Tab. Examples of

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CSS fields: any of the "Enter [custom content area] Styles" fields on the Layout tab.

To upload an image, select the Upload New Image button .The Marketplace Image Upload window then appears. Select the Choose File button to navigate to a local or network location and select an image. The image must be in JPEG, GIF, or PNG file format. The maximum file size is 500 KB.

After an image is uploaded, it will be listed on the Images tab. You can view an uploaded image by selecting the View button for the corresponding image. The selected image will be displayed in the preview area on the right side of the Images tab.

You can delete an image by selecting the Delete button .

In order to use the images that you upload with HTML entered in the "Custom Content" fields or CSS entered in style sheets, you will need to understand how to construct an image path.

Some browsers can be used to help determine an image URL. To do this, select the View button for an image on the Images tab. Then, for example, with Firefox you can right click on the preview image and choose "Copy Image Location," or with Chrome, you can right click on the preview image and choose "Copy Image Address."

10.4 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 562**).

How to Configure Parameters

The uPay Form Parameters page contains information about the parameters that can be passed to your uPay site. When these parameters are passed, uPay takes actions such as inserting the passed values into the payment information fields of your uPay site.

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The uPay Form Parameters page also lets you configure parameters that otherwise would not be used by Marketplace. Configuration fields let you enter parameter information so that Marketplace will recognize these parameters for use in reports and payment search.

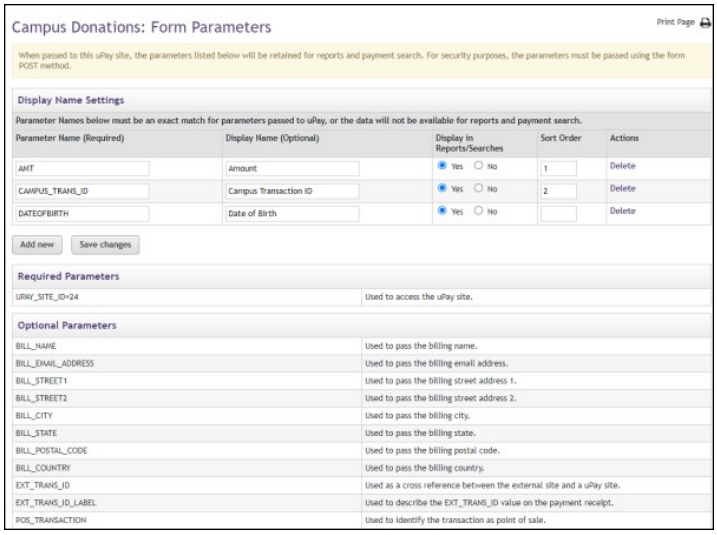
All of these parameters are passed by your campus web application when the customer initiates the payment process.

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.

Note: uPay will pass these parameters back to the posting URL after the transaction has been processed.

Important! Be sure to take note of the UPAY_SITE_ID value. Your campus web application will need this value.

For details on the form parameters, see **"Passing Parameters to Your uPay Site" on page 526**.



Fields for configuring additional parameters are located at the top of the Form Parameters page.

Display Name Settings

The Display Name Settings section displays any parameters that have been configured for use with the Marketplace Operations Center's payment search functionality and for display in Marketplace's uPay Form Parameters Report. These parameters may be part of the Optional Parameters listed lower on this page, OR these parameters may be new parameters that uPay would not otherwise take action upon when receiving. If you need to configure a parameter to be recognized by uPay for searching and reporting, select the Add New button. This will generate a new row of fields that you can use for configuring the passed parameter to be recognized by uPay.

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Note: All parameters passed to the uPay site will be sent back to your campus web application at the conclusion of the payment process, regardless of whether the parameters have been configured with the Display Name Settings fields.

Parameter Name
Enter the name of the parameter as passed by the campus web application.

Display Name
This field is optional. The value that you enter in this field will be used as the alias value that is used with payment search and the Form Parameters report in lieu of the value entered in the Parameter Name field. If you don't make an entry in this field, the Parameter Name value will is used with payment search and reporting.

Display in Reports/Searches
The Yes/No radio buttons let you specify whether the parameter will be available for searching and reporting. Typically, when a parameter is configured, Yes should be selected. However, if data for that parameter needs to be stored in Marketplace but you do not want the data to appear in reports (or be searchable), you can select No.

Sort Order
The sort order entry determines the order for the additional parameters in the Form Parameters Report.

Actions
A delete link appears in this column once a parameter has been configured for display.

Required Parameters

UPAY_SITE_ID parameter must always be passed by the campus web application in order to launch the corresponding uPay site.

Optional Parameters

If the campus web application passes any of the parameters listed in this section, the uPay site will take action based on that input. For example, if any of the BILL_ fields are passed, then the corresponding fields in uPay will be prepopulated with the values passed, making it easier for the customer to proceed through the uPay payment process.

For details on all the optional parameters, see **"Passing Parameters to Your uPay Site" on page 526**.

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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 562**. 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

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Parameters	Description	Field Length	Data Type
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	alphabetic

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Parameters	Description	Field Length	Data Type
EXT_TRANS_ID	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. 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. This field does not appear if you selected Yes for "Site uses T-Link" on the uPay Payment Settings page. 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. 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.	250	alphanumeric
EXT_TRANS_ID_LABEL	Optional. This field can contain a description of the EXT_TRANS_ID value. If this parameter is used *and 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.	unlimited	alphanumeric

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Parameters	Description	Field Length	Data Type
AMT	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. 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. 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 487**. Maximum value: 99999.99.	8 (including 2 characters to the right of the decimal point)	numeric
SSV	This parameter can be used only used if you accept ACH payments. This is the Shared Secret Value that the user enters on the ACH agreement page when paying by checking or savings account. A shared secret value is an alphanumeric value that the user knows, for example, their birth year or their mother's maiden name. While the shared secret value is not required by uPay, it is a requirement of the NACHA rules for web-based ACH payments. Having users enter a shared secret value increases security of payments through electronic bank accounts.	unlimited	alphanumeric

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Parameters	Description	Field Length	Data Type
SSV_PROMPT	This parameter can only be used if you accept ACH payments. The SSV_PROMPT is used when the user pays by checking or savings account. If passed, it overrides your setting for the Shared Secret Value prompt. This is the prompt shown to users so they know what to enter for the Shared Secret value. If the prompt value is not passed, uPay uses the prompt you define in the Payment Method Settings page.	unlimited	alphanumeric
VALIDATION_ KEY	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. In order to pass a VALIDATION_KEY, 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. ● 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 555**. If any part of this configuration has not been completed, uPay will not accept the payment.	unlimited	alphanumeric
ADD_ON_ OFFER_ DISABLED	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.	unlimited	alphanumeric

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Parameters	Description	Field Length	Data Type
RECURRING_ USER_CAN_ CHANGE	Optional. In order to establish recurring payments, this parameter MUST be passed. This parameter determines whether the customer can change the recurring payment values that are passed by the campus web application. Accepted values: True or False. **Note:** If RECURRING_USER_CAN_ CHANGE = false, uPay must receive RECURRING_START_DATE, RECURRING_ FREQUENCY and RECURRING_END_DATE or RECURRING_NUMBER_OF_PAYMENTS. If uPay does not receive these values, uPay will display an error message to the customer.	unlimited	alphanumeric

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Parameters	Description	Field Length	Data Type
RECURRING_CAN_CHANGE_END_DATE_TO_CC_EXP_DATE	If recurring payment parameters are being sent to the uPay site, this parameter determines what happens if the customer enters a payment card expiration date that will occur *before* the projected end date of the recurring payments. Accepted values: Yes or No. If RECURRING_EXP_DATE_CHANGE = Yes and the customer enters a payment 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 payment card expiration date. If RECURRING_EXP_DATE_CHANGE = No and the customer enters a payment card expiration date that will occur before the projected end date of the recurring payments, uPay will prompt the customer to use a different payment card. **Example:** The customer uses the campus web application to make a monthly donation of $100. In the campus web application, the customer enters the following information 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 payment card information. The customer enters a payment 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. **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	unlimited	alphanumeric

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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. Any value passed in this field will override the Maximum Duration as configured in the Recurring Settings for this uPay site. Required date format: mm/dd/yyyy. (Maximum accepted value is 99 years from the start date.)	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), 7 (Annually), and 9 (Daily). **Note:** For RECURRING_FREQUENCY, be sure to use the accepted numerical values. For example, to set up 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. Any value passed in this field will override the Maximum Duration as configured in the Recurring Settings for this uPay site. (Maximum accepted value is 99 years from the start date.) **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

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Parameters	Description	Field Length	Data Type
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
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

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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

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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
[additional parameters]	In addition to the parameters described above, the campus web application can send additional parameters. The campus merchant can configure any of these parameters to be available in Marketplace reports and orders search, as described in **"How to Configure Parameters" on page 526**. uPay will take no additional actions on these parameters other than to return these parameters to the Posting URL, as described in **"Using a Posting URL" on page 562**).		

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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>	action = "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. method = "post" Use the "POST" method. The uPay site will not accept parameters from a "GET" method.
<input> (#1)	type = "hidden" name = "UPAY_SITE_ID" value = "z" 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. Usage: This parameter is required in order to launch a uPay site.

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HTML Element	Attributes
<input> (#2)	type = "hidden" name = "EXT_TRANS_ID" value = "x" 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 characaters. 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).
<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 562**). 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 529**.

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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.

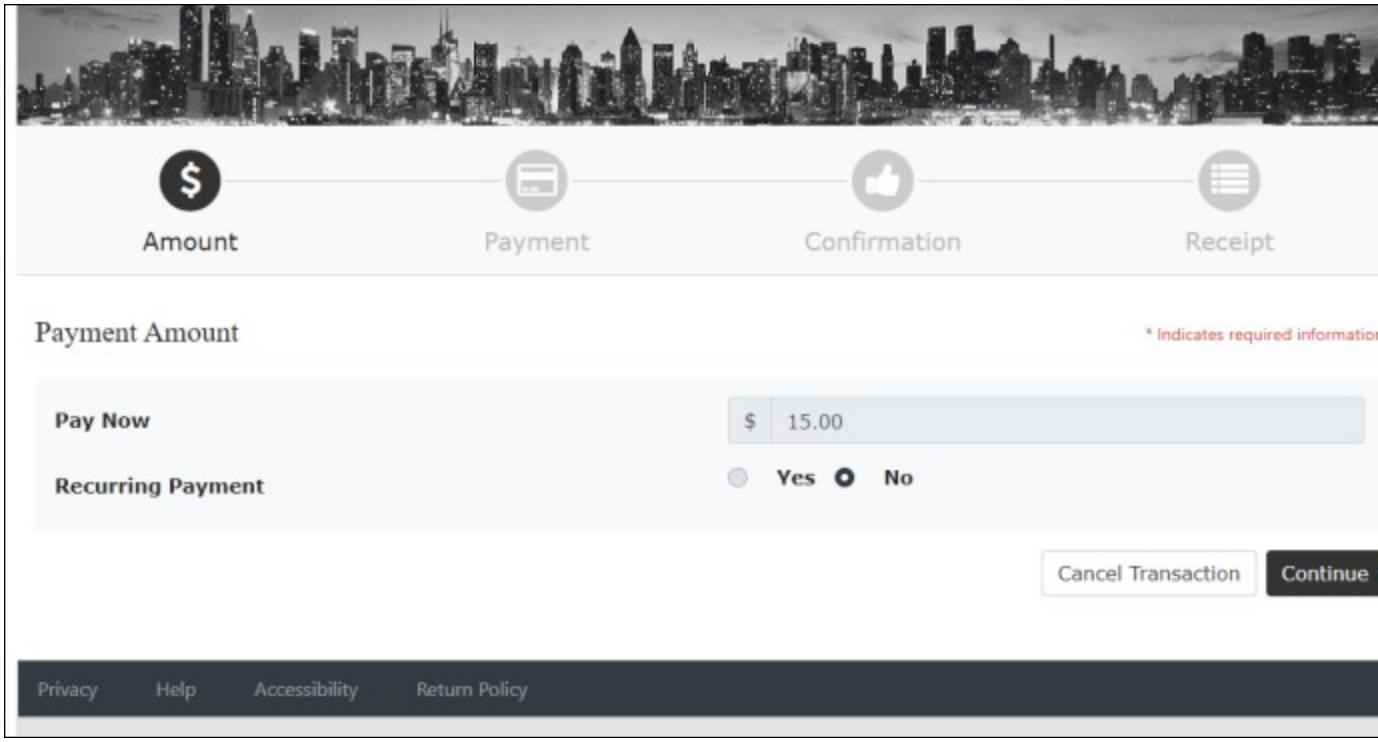
Note: In this example, the UPAY_SITE_ID value can be entered as a static part of the form; however, both the EXT_TRANS_ID value and the AMT value should be determined dynamically. In this way, a unique transaction ID is established for each transaction, and the appropriate dollar amount for the customer's 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:

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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.

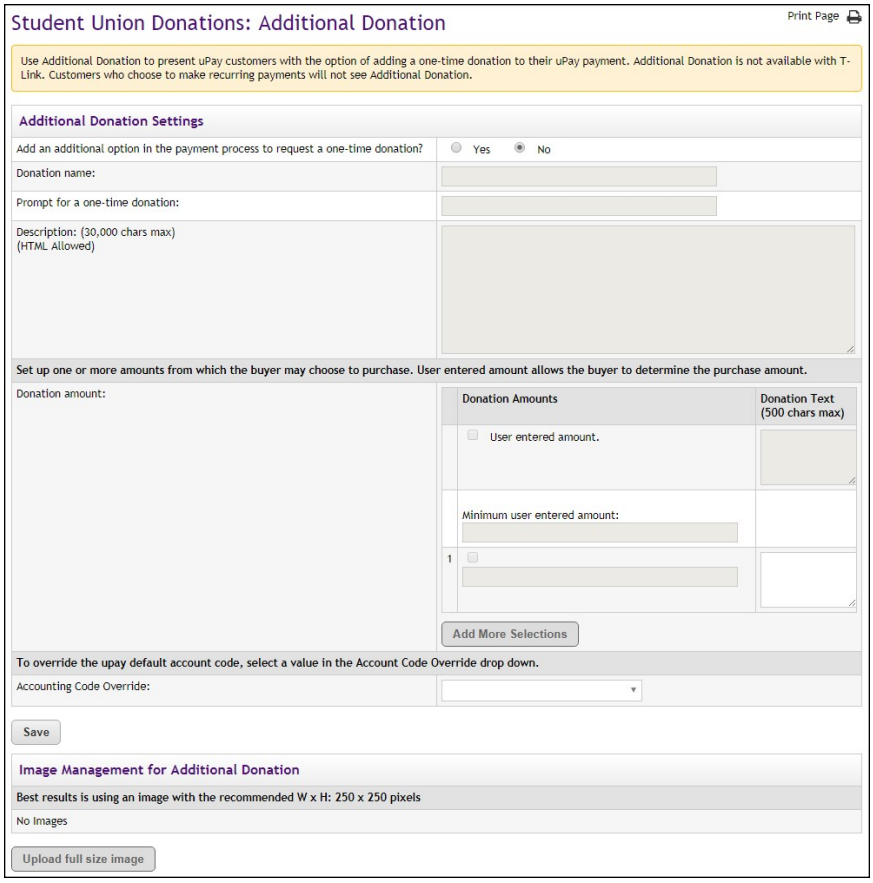
10.5 Additional Donations

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

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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?

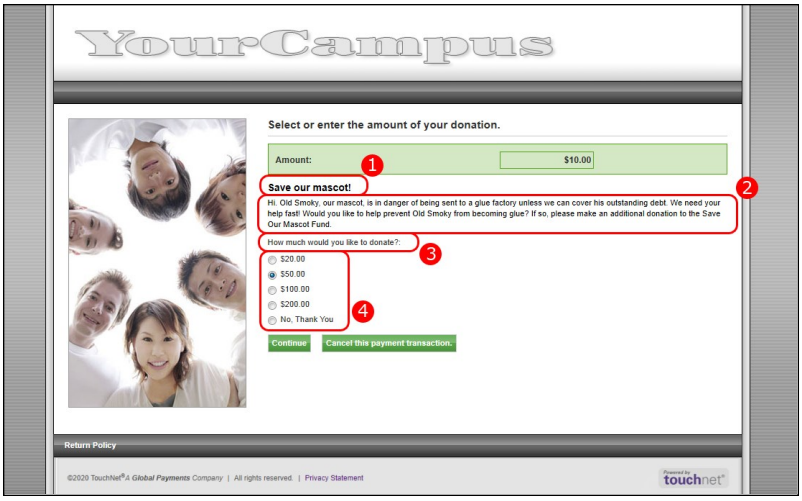
Choose the Yes button to turn on the additional donation option.

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.

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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 buton 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).

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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.

10.6 Using PayPath with uPay

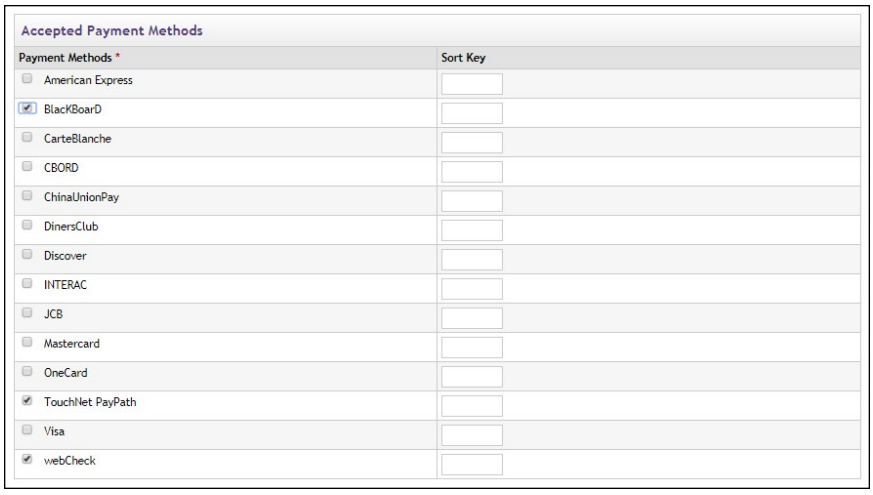
The following sections describe the configuration settings within Marketplace that involve PayPath. These settings involve payment method configuration, payment notification messages, and the use of "Terms and Conditions" statements. The following sections also consider Host System Accounts and other issues.

Note: Most integration for PayPath and uPay takes place outside of Marketplace, and most of this integration is done by TouchNet once the PayPath merchant agreement process has been completed.

Important! If you would like to add PayPath to an existing uPay site, you should contact your campus administrator for TouchNet products (Marketplace, Payment Gateway, and PayPath) to determine if any additional configuration needs to be done. This configuration is done within Payment Gateway and PayPath.

Payment Method Configuration

To configure a uPay site for PayPath, you must choose "TouchNet PayPath" as an accepted payment method on the Payment Settings page.



To establish PayPath as an available payment method for your uPay site, you must select "TouchNet PayPath" on the Payment Settings page.

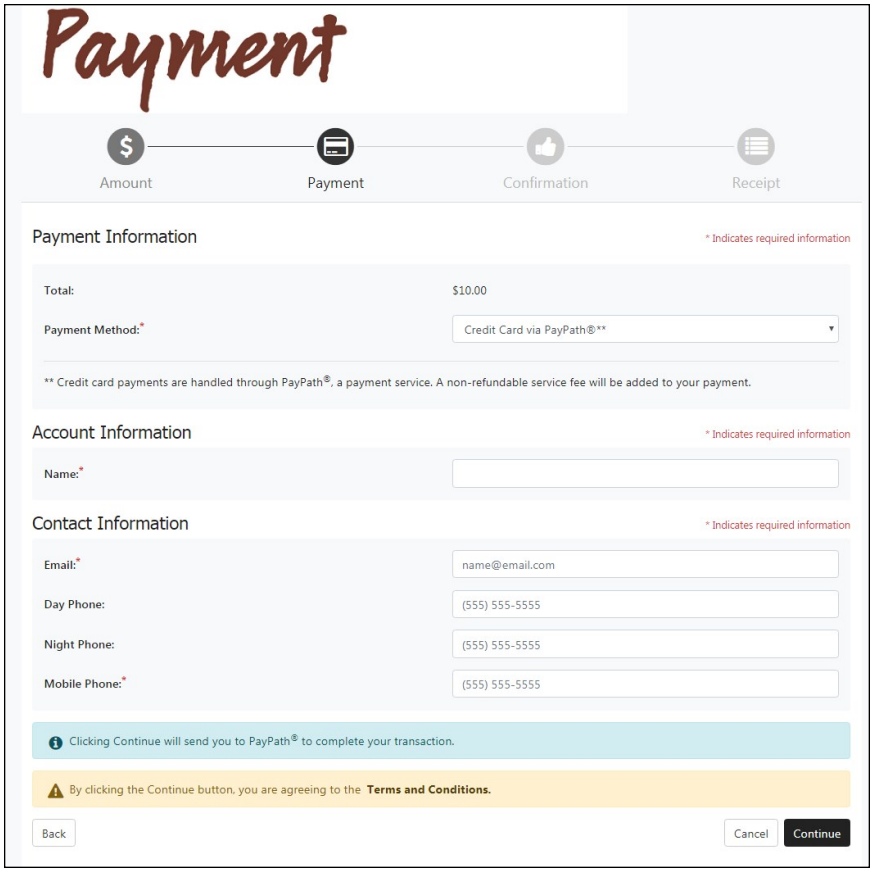
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You cannot configure payment cards as accepted payment methods in addition to PayPath. The associated payment cards for PayPath are configured within Payment Gateway, not Marketplace. (The Payment Gateway configuration for PayPath is typically done by TouchNet.) However, you can choose to accept non-payment-card payment methods, such as ACH or campus cards, in conjunction with PayPath.

Important! If you select payment cards as well as PayPath on the Payment Settings page, Marketplace will prompt you to modify your selected payment methods before the settings can be saved.

The uPay Site Template

You can link from your uPay payment pages to a Terms and Conditions page that you have configured *outside of Marketplace*. By configuring this link to appear, you can provide your customers with a way to get additional information about service fees or convenience fees. This link appears on the same page in uPay where customers select the Payment Method.



The Terms and Conditions prompt appears in the yellow bar near the bottom of the uPay Payment page. Customers can select the "Terms and Conditions" text link to see the web page that you have configured outside of Marketplace.

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To configure the Terms and Conditions prompt to appear, follow these instructions:

1 Go to Site Template Setup for your uPay site in the Operations Center:

[Merchant Name] > uPay Sites > [uPay Site Name] > Site Template Setup

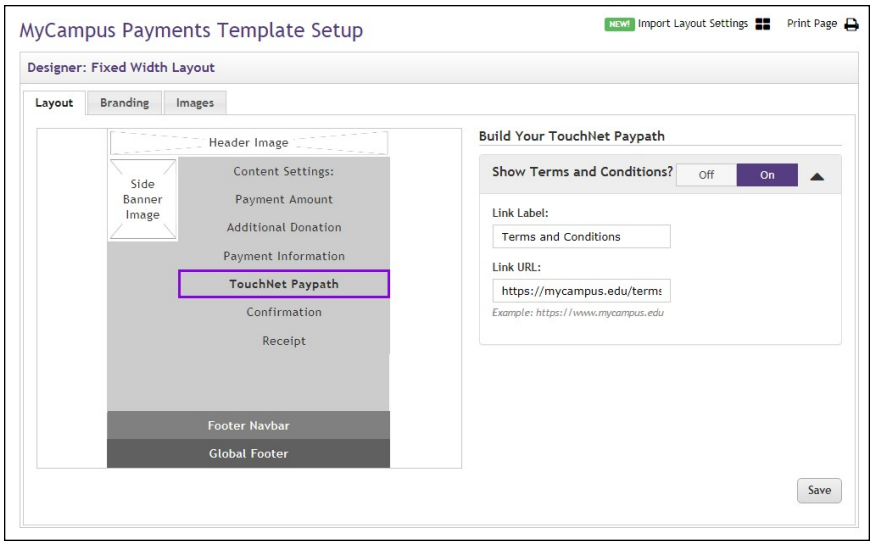
The uPay Site Template Setup page then appears.

2 Select the Edit button for the Designer or Classic template, as appropriate for you uPay site.

A sample uPay site layout page appear.

3 Select the "TouchNet PayPath" section of the sample layout upage.

The "Build Your TouchNet PayPath" settings appear.



The Build Your TouchNet PayPath fields allow you to configure the Terms and Conditions link.

4 Select the On button to show a Terms and Conditions prompt on your uPay site.

5 Enter text for the "Terms and Conditions" link in the "Link Label" field.

Note: This link does not have to say "Terms and Conditions." You can enter text that best fits the needs of your uPay site.

6 Enter a URL for the "Terms and Conditions" page on your campus web site.

Note: The Classic template page for PayPath settings has one additional field: "</> Enter TouchNet PayPath Content" — which can be used to enter text that appears at the top of the Payment Method page for PayPath. The corresponding section in the Designer template is called "Payment

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Information" and the field is called "</> Enter Payment Information Content"; however, this section serves for all payment methods.

Email Settings

When customers use PayPath as the payment method, PayPath sends notification messages to the customer. If you would like for the customer to also receive a message from uPay, you can select Yes for the "Send TouchNet PayPath Payment Notification Email to Buyer" setting on your uPay site's General Settings page.

Note: Keep in mind if you turn on this setting that your customers will receive payment confirmation messages from both uPay and PayPath.

If your customer selects a non-PayPath payment method, such as ACH, then the "Send Payment Notification Email to Payer" settings will be used to determine whether uPay sends a payment notification to the customer. So you should be sure to make selections for both the fields.



Your uPay site can be configured to send notification methods when PayPath transactions take place.

Host System Account Considerations

When a PayPath payment method is added to a Host System Account in Payment Gateway, either a service fee OR a convenience fee can be associated with that PayPath payment method — but not BOTH a service fee and a convenience fee. If a single merchant needs to apply a service fee to some uPay PayPath transactions and a convenience fee to other uPay PayPath transactions, then that merchant must use two different Marketplace merchants so that different Host System Accounts can be utilized.

For more information about PayPath, see the *TouchNet PayPath 7 — Administrator's Guide*.

Additional Parameter for the Posting URL

After a transaction is processed, uPay sends parameters that describe the transaction to the posting URL. One additional parameter is sent for transactions that use PayPath: PAYPATH_TRANSACTION_ID. The value for this parameter contains a reference number that identifies the PayPath transaction.

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Important! Be sure to contact the administrator of the campus web application and let that person know an additional parameter will be sent with PayPath transactions.

Convenience Fees and Service Fees

Marketplace provides the ability to integrate PayPath with uPay and accept service fees and convenience fees when payments are processed. There are specific guidelines to determine when to charge a service fee or a convenience fee. The following sections detail these guidelines.

Please refer to the PayPath Administrator's Guide for more information about convenience fees and service fees.

Note: These service fee and convenience fee guidelines apply to U.S. Merchants.

Service Fees

When can a service fee be charged?

Service Fees can only be assessed by specific merchant groups (including government and education), for both eCommerce (online) and POS (inline) payments. A merchant, third party, or Acquirer that charges a Service Fee must comply with the following requirements.

Important! Service fees can be a percentage fee.

Service Fee Requirements

- Accept the card brand (Visa, MasterCard, etc.) as a means of payment in all channels where payments are accepted (eCommerce, MOTO, and POS)
- Disclose the fee clearly to the Cardholder as a Service Fee, before the transaction is completed and provide the ability for the cardholder to cancel the transaction without incurring a fee or penalty
- Not represent the Service Fee as a fee charged by Visa
- Ensure that the Service Fee amount is
  - A reasonable reflection of the costs associated with completing the Transaction (and capped where possible)
  - A flat, fixed, banded, or proportionate amount, regardless of the value of the payment due, as required by applicable laws or regulations
  - Assessed only on the final Transaction amount, after all discounts and rebates have been applied during the Transaction
  - Not charged in addition to a surcharge or Convenience Fee

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Here is a list of the Applicable Merchant Category Codes (MCCs) for service fees:

- 9311 (Tax Payments)
- 9399 (Government Services Not Elsewhere Classified)
- 9222 (Fines)
- 9211 (Court Costs, Including Alimony and Child Support)
- 8220 (Colleges, Universities, Professional Schools, and Junior Colleges)
- 8211 (Elementary and Secondary Schools)
- 8244 (Business and Secretarial Schools)
- 8249 (Vocational and Trade Schools)

What Type of Payments should a Service Fee be used for?

Service Fees should be used when accepting payments for tuition and related fees. Typically, these are items that could be present on the student bill. For uPay with PayPath items such as tuition, housing, application fees, etc. should leverage a Service Fee.

Convenience Fees

When can a Convenience Fee be charged? (US Merchants)

A Convenience Fee is a fee assessed by a merchant directly on an eCommerce payment, (online in lieu of in person at an office or store). This fee is applied for the convenience of taking a payment online instead of travelling to the physical location and making the payment there.

Important! You can only charge a flat rate for a convenience fee, not a percentage.

What Types of Payments Should a Convenience Fee be used for?

Convenience Fees should be used when accepting payments for non-tuition and related fees. Payments for items such as ticketing, vending, other products an services, should leverage a Convenience Fee. For US customers, the PayPath Convenience Fee option is only available for students leveraging the uPay integration with PayPath.

Here are some other examples of when a convenience fee can be charged:

- For a bona fide convenience in the form of an alternative payment channel outside the Merchant's customary payment channels and not charged solely for the acceptance of a Card (aka - when there is another way to make a payment to the merchant)
- Added only to a Transaction completed in a Card-Absent Environment
- Not charged if the Merchant operates exclusively in a Card-Absent Environment

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- Charged only by the Merchant that provides goods or services to the Cardholder
- Applicable to all forms of payment accepted in the payment channel
- Disclosed early to the Cardholder:
  - As a charge for the alternative payment channel convenience
  - Before the completion of the Transaction the cardholder must be give the opportunity to cancel
- A flat or fixed amount, regardless of the value of the payment due.
- Included as part of the total amount of the Transaction and not collected separately
- Not charged in addition to a surcharge
- Not charged on a Recurring Transaction or an Installment Transaction

Note: Please refer to the PayPath Administrator's Guide for more information about convenience fees and service fees.

Additional Considerations

The transaction amounts for PayPath service fees and convenience fees are not reported to the general ledger system. Marketplace only reports the amount of the original uPay transaction to the general ledger system.

In addition, PayPath has its own functionality for transaction reporting that your school's accounting office may need to use for balancing batches.

Important! Once uPay transactions are processed with PayPath, your school's internal processes may need to change regarding how batches are balanced. If your school used Payment Gateway and/or RECON1 for balancing batches, they will need to consider also using PayPath View Activity reports.

10.7 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:

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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.

10.8 Google reCAPTCHA

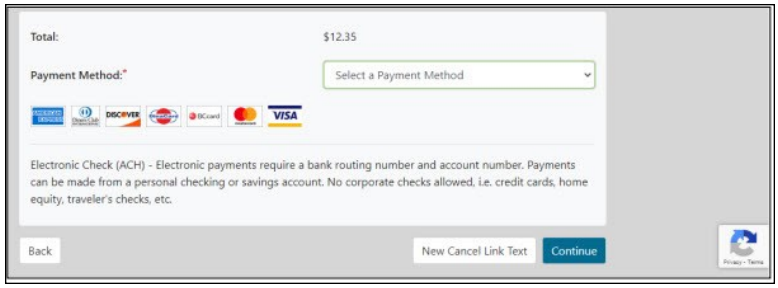
uPay has been upgraded to use Google reCAPTCHA ("invisible" version). This change will also allow reCAPTCHA to be turned on for all uPay sites without individually updating the settings. For schools that do not currently use reCAPTCHA for their uPay sites, this feature will be defaulted off. For those institutions currently using Visual CAPTCHA for a majority of their uPay sites, TouchNet will turn reCAPTCHA on automatically. Institutions should reach out to their Customer Success Manager (CSM) if they would like to alter their reCAPTCHA settings.

Google reCAPTCHA will not be deployed for Point of Sale transactions.

Google reCAPTCHA uses a set of proprietary algorithms to determine when there is suspicious behavior.

- For non-suspicious payments the payer will be allowed to complete the payment without any additional clicks, removing the current visual verification step.
- If suspicious behavior is detected, upon clicking the continue button on the Payment Information page in uPay, an error will be displayed to the user stating they have failed reCAPTCHA. The payer will then be returned to the error link.

A user can verify that reCAPTCHA is engaged by the presence of the Google reCAPTCHA icon in the lower right corner of their browser on the payment method selection page:



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The Marketplace Operations Center control to enable CAPTCHA at the uPay Site level has been removed from the Payment Settings page and from the add new uPay Site workflows.

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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 487**.)
- **Recurring Settings—**Change settings for recurring payments. (See **"uPay Recurring Payments" on page 505**.)
- **Miscellaneous—**Change navigation, privacy, and e-mail contact information. Also, take the site offline or bring it online. (See **"General Settings" on page 498**.)
- **Email Messages—**Change e-mail announcements. (See **"Email Messages for uPay Sites" on page 507**.)
- **Layout Templates—**Change or edit the layout template used by your uPay site. (See **uPay Layout Templates**.)
- **Image Management—**Upload new site images. (See **uPay Site Images**.)

Some additional settings/features are outside of the uPay site creation process:

- **User Maintenance**—Grant uPay user roles and edit existing users. (See **"Adding uPay Site Users" on page 575**, **"Editing uPay Site User Roles" on page 576**, and **"Deleting a uPay Site" on page 572**.)
- **Payment Search**—Search for payments, refund payments, and cancel scheduled payments. (See **"Payment Search, Refunds, and Cancellations" on page 577**.)

11.2 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_

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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 556**.)
- 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 556**.)
- The campus web application must determine the value for the VALIDATION_KEY parameter as described in **"Creating a VALIDATION_KEY" on page 558**.
- The campus web application must pass a transaction amount (AMT) as an input parameter. (For more information, see **"About the AMT Parameter" on page 560**.)
- 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 560**.)
- 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 561**.)

If any part of this configuration has not been completed, uPay will not accept the payment.

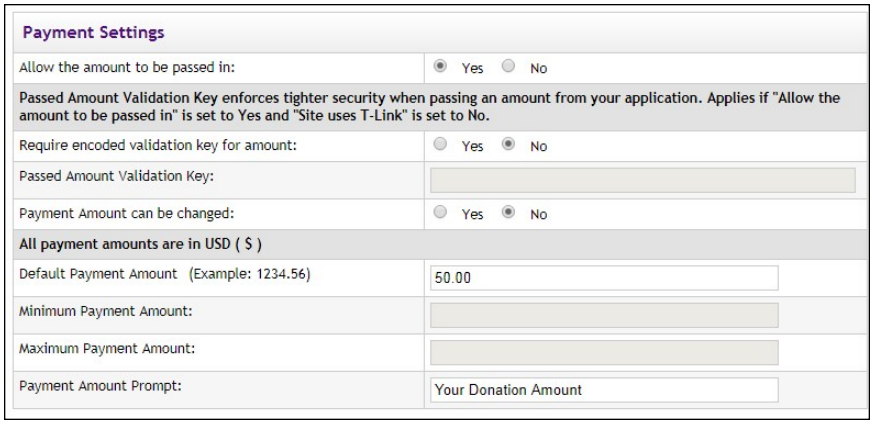
The following subsections provide the details for using the VALIDATION_KEY option.

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

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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 558**).

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).

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- **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 561**.)

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,

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as described in "uPay Site Configuration for the VALIDATION_KEY Option" on page 556. 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 560. 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 560. 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 561 .

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
```


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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 556**.

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,

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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 558**) 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).

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Parameter	Description
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 ecnoded VALIDATION_KEY value that you determined as described in **"Creating a VALIDATION_KEY" on page 558**.

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.

11.3 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 526**. 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.

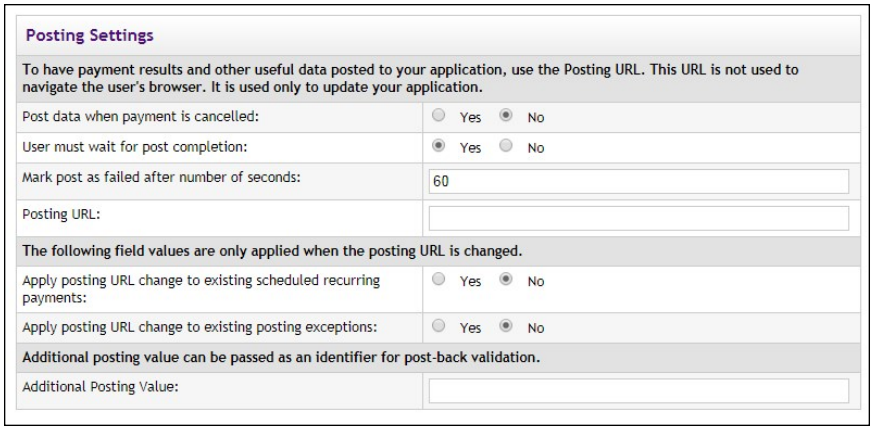
Note: Campus web applications do not necessarily need to pass a transaction ID to uPay; however, without a transaction ID the campus organization will likely have difficulty matching payment information with customer information. We recommend use of the EXT_TRANS_ID parameter, which allows for payment 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.

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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 563**.

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

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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 payment 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 **"General Settings" on page 498**.)	30	alphanumeric
tpg_trans_id	A reference number assigned by Payment Gateway.	unlimited	alphanumeric
session_identifier	Unique code that identifies the session.	maximum of 48	alphanumeric
pmt_status	Status of the transaction as reported by Payment Gateway. Either "success" or "cancelled".	unlimited	alphanumeric

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Parameters	Description	Field Length	Data Type
pmt_amt	Amount of the transaction processed by Payment Gateway. (Maximum value: $99,999.99.) *Forrecurring payments:* 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 payment 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
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

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Parameters	Description	Field Length	Data Type
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

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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 payment card transactions:

Parameters	Description	Field Length	Data Type
card_type	Type of payment card: Mastercard, Visa, American Express, Discover, etc.	unlimited	alphanumeric

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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

Additional parameter for PayPath transactions:

Parameters	Description	Field Length	Data Type
PAYPATH_TRANSACTION_ID	A reference number that identifies the PayPath transaction.	unlimited	alphanumeric

Parameters for cancellations:

Parameters	Description	Field Length	Data Type
posting_key	A security value specified when the uPay site was built. (See **"General Settings" on page 498**.)	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

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- 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

11.4 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.

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3 Click the Save button.

Archiving a uPay Site

Schools have the ability to archive an existing uPay site that is no longer in use, instead of deleting it. The archive option allows you to retain the store's order history for reporting purposes but removes the site. or order search. Once a uPay site is archived it will no longer display in the Marketplace Operations Center.

Users with the Merchant Manager, or uPay Site Manager role will be able to archive a store.

The Archive option will be available if there is payment history but no outstanding recurring payments for the uPay site.

For uPay Sites that interact with TouchNet Ready Partners: when a site is being archived uPay and TLink will work together to identify outstanding Partner driven recurring payments. These payments will be flagged as being for an archived site and the Partner will receive an error if they request subsequent payments.

Important! Administrators should not archive a uPay Site if a TouchNet Ready Partner or uPay has outstanding recurring payments or if refunds could still be issued (1 year from last order/recurring payment). Archiving a uPay Site will prevent future recurring payments and refunds from being completed in Marketplace Operations Center.

Follow these steps to archive an existing uPay Site.

1 From the left navigation menu select the desired merchant > Sites > [uPay site] > Store Settings > General. The General Settings Status page displays.

2 The Archive Site button appear at the top of the page.

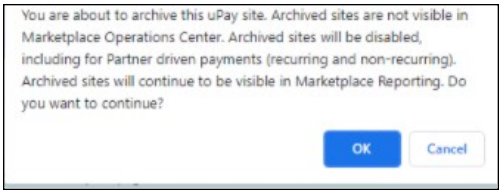
Note: If the uPay Site has payment history but no pending recurring payments the Archive button will be displayed but the Delete button will not. If the uPay site has payment history and pending recurring payments then the Archive button will be displayed in a disabled state.

3 Click the Archive button.

4 A popup window displays for you to confirm you want to continue with archiving this store. Click OK to continue archiving the store.

Note: If a Merchant Manager clicks ok they will be forwarded to the Archived menu item with a success message. If a uPay Site Manager clicks ok they will be forwarded to the Marketplace home page with a success message.

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The Archive Confirmation window

Once a store is archived, it will no longer display in the left navigation menu, Marketplace home page, and lists of available site for Template importing. the uPay site payment history will still be available for reporting and advanced order searches.

When you have archived a uPay Site, an Archived menu option displays in the left navigation menu, under the Merchant. The Archived window displays all stores and uPay Sites that were previously archived.

This Archived menu item will appear only when there are archived stores and/or sites for that merchant. When accessed, this page will display archived site ID & name, by whom and when the site was archived and a Restore link.



The Archived menu option

Restoring an Archived uPay Site

If you need to restore a previously archived uPay Site, you can use the Archived menu option to view all your archived uPay Sites and select the desired site to retrieve. The Restore link will allow the Merchant Manager to restore the uPay site, in a disabled status, should it be needed in the future.

Follow these steps to restore an archived uPay Site.

1. Click the Archived menu option. The Archived store window displays.
2. Click Restore in the Action column. The uPay Site is restored.
3. A message displays at the top of the Archive page indicating the uPay Site is restored successfully.

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When the Restore link is clicked the uPay site will be added back to the left menu and Marketplace home page. A success message will appear with links to the restored uPay site. The uPay site will be restored in a disabled status for web and point of sale. If the uPay site connects to a TouchNet Ready Partner where recurring payments had been archived, the restoral process will also unflag those payments so that the Partner can submit subsequent recurring payments.

11.5 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.

11.6 Copying a uPay Site

You can set up new sites via a copy from an existing uPay site.

Marketplace users can be granted the “Copy Permission” via the System Administrative > User Settings > Users menu item.

Note: This is an existing role that is being expanded from being uStores only to being applicable to both uStores and uPay.

Add New Site without Copy Permission or without using Copy Feature

If a Merchant Manager does not have the “Copy Permission” role when they click on [merchant name] > Sites > Add New Upay Site they will be taken to a page that requests the site name and site manager. If a Merchant Manager has the Copy Permission role, the page will request the site name, site manager and if they would like to copy from an existing site.

After entering the site name and manager the new site will be created. If the site creation fails, the user will be returned to the Add New Site page with

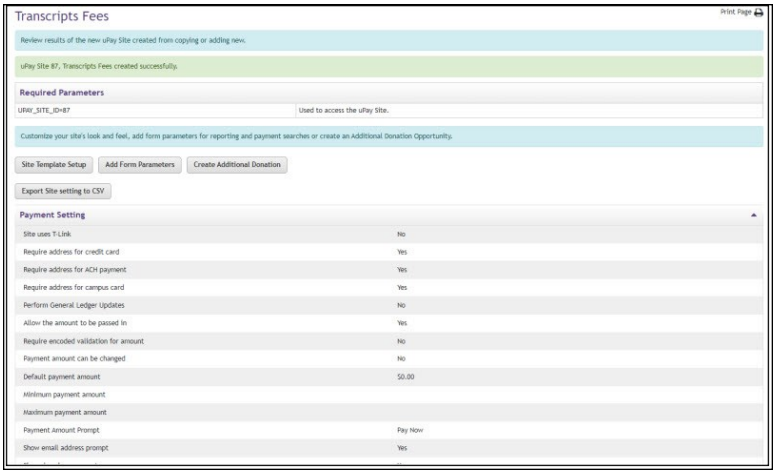
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an error message. If the site creation is successful, the user will be placed on a completion page with a success and any warning messages, summary of the default settings applied and links to further customize the uPay Site.

New sites will be created in a disabled status. Default settings for a site include/do not include:

- Set Use TLink and associated settings to No
- Set General Ledger Integration to No
- Security features (encoded validation, ACH Shared Secret Prompts, etc.) off/empty
- Enables all payment methods that are in the HSA (except TouchNet
- PayPath)
- Success, Error and Cancellation URLs
- Recurring Payments and Additional Donation features turned off

Users will need to complete the site settings to be able to enable and use the site successfully.

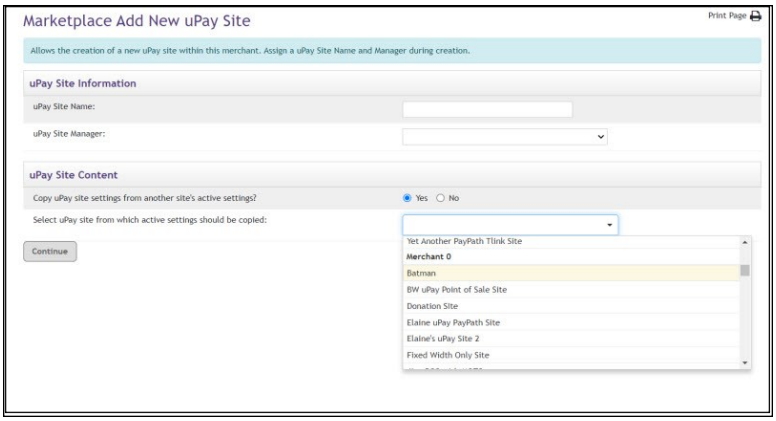


Add New Site with Copy Permission

If a Merchant Manager has the “Copy Permission” role when they click on [merchant name] > Sites > Add New Upay Site they will be taken to a page that requests the site name, site manager and if they would like to copy from an existing site. When copying from an existing site they will be able to see a list of all uPay sites that they currently have access to.

- If the Merchant Manager does not have access to any other Merchant and/or uPay Site then the copy function will be suppressed.

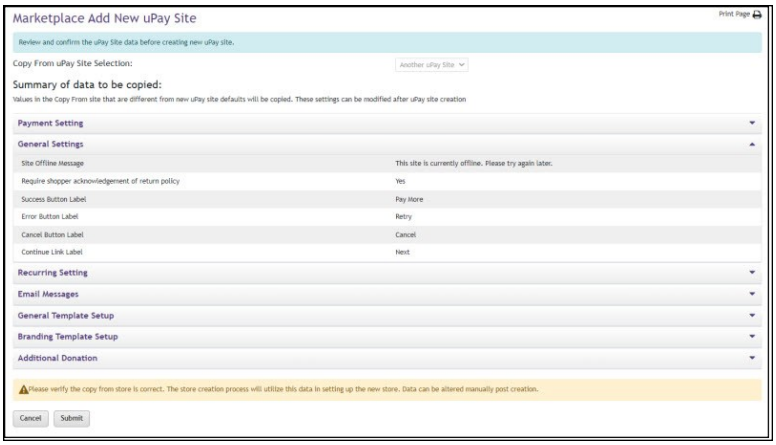
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After entering the site name, manager and copy from site a view will be displayed that shows the settings that will be copied that are different from the default settings. Each section can be expanded to view the line items that are different.

There are certain settings or configurations that will not be copied due to security rules. Those things include:

- Payment Settings > Passed Amount Validation Key and ACH Shared Secret Prompts
- Payment Settings > Passed Amount Validation Key and ACH Shared Secret Prompts
- General Settings > Web and POS Site Status (new sites will be defaulted to disabled), Site Name and Site Email Address, Posting URL value and associated settings, Additional Posting Value and Success, Error and Cancel URL values
- Recurring Settings > Contact Information
- All User Permissions



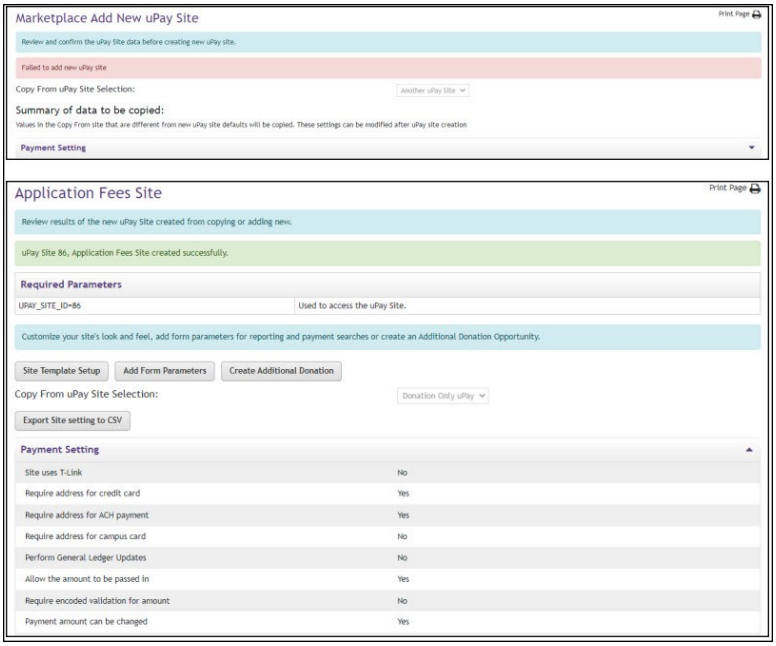
Once a user has reviewed the settings and clicked “Submit” the new uPay Site will be created. If an issue is encountered the user will remain on the same page with a red error message displayed. If successful, the customer

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will be placed on a completion page with a success and any warning messages, summary of the settings copied and links to further customize the uPay Site. New sites will be created in a disabled status.

The following items may cause warning messages to be displayed:

- General Ledger warnings: When the accounting code (or associate values) being copied are not valid for the new site merchant
- Payment Method warnings: When the payment methods being copied are not valid for the new site merchant/HSA



11.7 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.

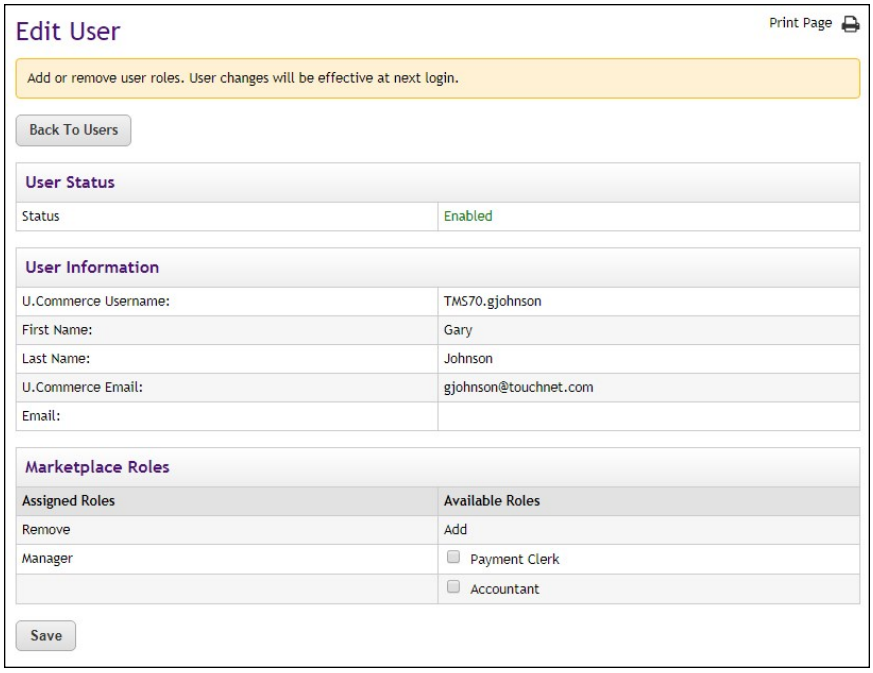
Note: Only a merchant manager or uPay site manager can add uPay site users.

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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.

3 Find the corresponding user and then click the Edit User text link in the Action column. The Edit User page appears.



Note: For more information about the uPay user roles, see **"uPay User Roles" on page 478**.

4 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.

5 Click the Add Roles button.

6 Notify the user that you have given them a new Marketplace role.

11.8 Editing uPay Site User Roles

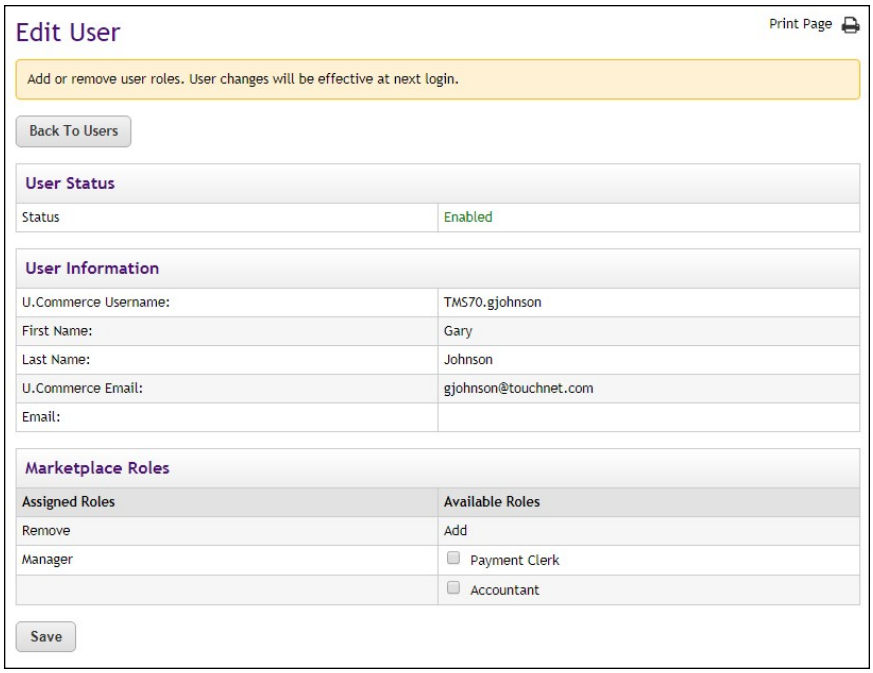
Follow these steps to edit user roles for uPay site managers, payment clerks, and store accountants.

Note: Only uPay site managers can edit these roles.

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1 From the left navigation menu, navigate to Marketplace Home > [merchant] > uPay Sites > [uPay Site] > Users. The [uPay Site] 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.



3 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 12**.

4 Click the Save button.

11.9 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

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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.

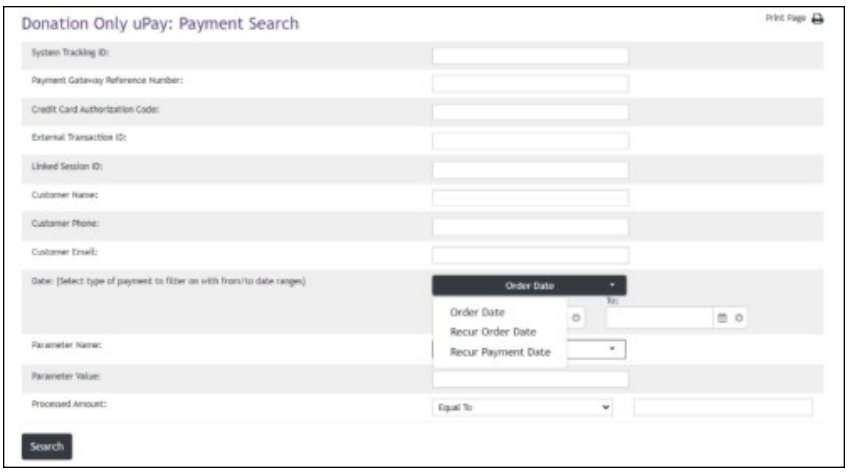
Look Up a Payment

The Payment Search page allows you to search all payments for the specified uPay site.

With Feature Pack 8.3, Administrators can now search based upon the Order Date, Recurring Order Date, or Recurring Date. Both past and future dates can be entered.

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).

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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 payment 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. Select the type of payment to filter on with from/to date ranges. You can search by Order Date, Recurring Order Date, or Recurring Payment Date. Both past and future dates can be entered.

Parameter Name
All additional form parameters configured for this uPay site are listed in this field. If you select one of these parameter names, all search results will include that parameter name. You can hold the CTRL key and click

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multiple items. You can also hold the SHIFT key to select a group of adjacent items.

Parameter Value

For all additional form parameters configured for all uPay sites, you can search for any specific parameter value that was passed to uPay. (For example, if the Parameter Name of CAMPUS_TRANS_ID was passed, you could search for a specific campus transaction ID, such as "345236," or if the Parameter Name of AMT was passed, you could search for a specific amount, such as "50.00."

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.

Partial Entries

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.

Searching With Ancillary Data

When transactions area processed by uPay, ancillary data is passed to Payment Gateway. This data includes External Tracking ID and Sys Tracking ID. The data is labelled within the ancillary data field, so it's easy to identify. If you would like to search in Marketplace for a payment that was received in Payment Gateway, you simply enter either the External Tracking ID value or the Sys Tracking ID value. Ancillary data for uPay recurring payments includes only the Sys Tracking ID.

Search Results

The payment search returns records of any payments that fit the search criteria you entered.

System Tracking ID	Order Date	Type	Customer Name	Customer Email	External Transaction ID	Processed Amount	Payment Method Name
5870	11/3/2020 12:24:31 PM EST	uPay	Test User	eferguson@touchnet.com	A234	$65.00	Visa
5944	12/3/2020 10:27:25 AM EST	uPay	Elane Ferguson	eferguson@touchnet.com	A234	$0.00	MasterCard
5945	12/3/2020 10:29:16 AM EST	uPay	Some Guy	someguy@touchnet.com	A234	$345.00	Visa
5946	12/3/2020 10:33:47 AM EST	uPay	Another Guy	anotherguy@touchnet.com	A234	$45.00	webCheck
5947	12/3/2020 10:34:54 AM EST	uPay	Some Gal	somegal@touchnet.com	A234	$0.00	BlackBoarD
5948	12/3/2020 10:36:56 AM EST	uPay	Another Gal	anothergal@touchnet.com	A234	$110.00	Visa
5949	12/3/2020 10:42:15 AM EST	uPay	anonymous	anonymous@touchnet.com	A234	$0.00	AmEx
6077	2/10/2021 10:26:21 AM EST	uPay	Test User	eferguson@touchnet.com	A234	$14.50	Visa
6078	2/10/2021 10:27:10 AM EST	uPay	Test User	eferguson@touchnet.com	A234	$27.50	MasterCard
6079	2/10/2021 10:28:08 AM EST	uPay	Test User	eferguson@touchnet.com	A234	$0.00	Visa

Results of a payment order search

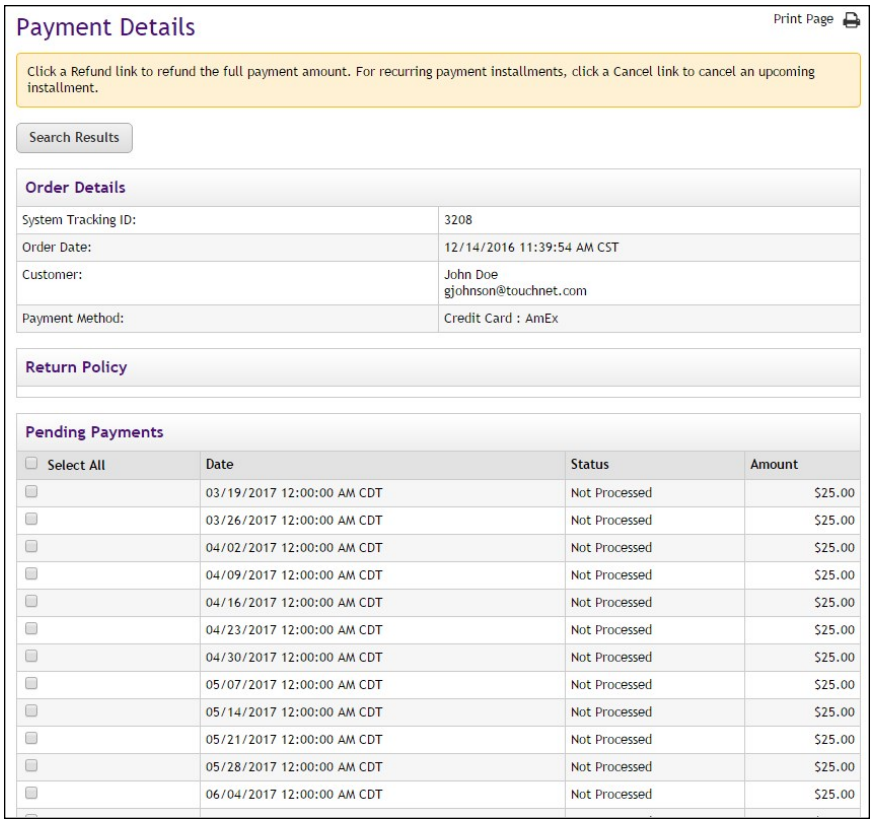
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Click the System Tracking ID to see more detailed information about the payment (or to refund or cancel the transaction). The Payment Details page then appears.

When searching for Recurring Payment Date, a single line item will be returned for each order included in the date range, even if multiple scheduled payments were found. Click the System Tracking ID to review pending and completed payments. The Payment Details page will allow administrators to cancel pending payment, retry failed payment and will link to the Refunds page.

Payment Details

The Payment Details page includes several sections: Order Details, Return Policy, Pending Payments, and Completed Payments.



Payment Details

Print Page

Click a Refund link to refund the full payment amount. For recurring payment installments, click a Cancel link to cancel an upcoming installment.

Search Results

Order Details

System Tracking ID:	3208
Order Date:	12/14/2016 11:39:54 AM CST
Customer:	John Doe gjohnson@touchnet.com
Payment Method:	Credit Card : AmEx

Return Policy

Pending Payments

Select All	Date	Status	Amount
	03/19/2017 12:00:00 AM CDT	Not Processed	$25.00
	03/26/2017 12:00:00 AM CDT	Not Processed	$25.00
	04/02/2017 12:00:00 AM CDT	Not Processed	$25.00
	04/09/2017 12:00:00 AM CDT	Not Processed	$25.00
	04/16/2017 12:00:00 AM CDT	Not Processed	$25.00
	04/23/2017 12:00:00 AM CDT	Not Processed	$25.00
	04/30/2017 12:00:00 AM CDT	Not Processed	$25.00
	05/07/2017 12:00:00 AM CDT	Not Processed	$25.00
	05/14/2017 12:00:00 AM CDT	Not Processed	$25.00
	05/21/2017 12:00:00 AM CDT	Not Processed	$25.00
	05/28/2017 12:00:00 AM CDT	Not Processed	$25.00
	06/04/2017 12:00:00 AM CDT	Not Processed	$25.00

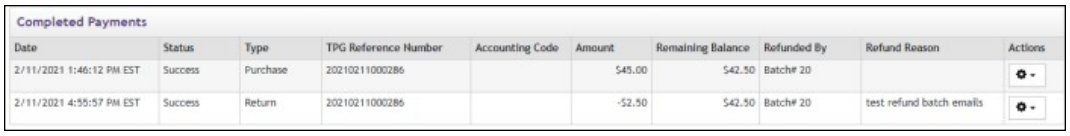
The Payment Details page shows completed payments, as well as pending payments, for the specified time period.

One-time pending payments are shown on a single line in the "Pending Payment" section. However, recurring pending payments are shown on multiple lines—one line for each payment to be made. For recurring payments, the "Order Date" field in the Order Details section indicates when the recurring payments were set up. The first payment will have been scheduled to occur on or after the set-up date.

For recurring payment, the Payment Details page shows Pending and Completed payments. You will be able to cancel pending recurring

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payments. In the Completed Payments you can also select to resend a receipt, retry, and refund option if available from the Action dropdown menu.



Completed Payments

Date	Status	Type	TPG Reference Number	Accounting Code	Amount	Remaining Balance	Refunded By	Refund Reason	Actions
2/11/2021 1:46:12 PM EST	Success	Purchase	20210211000286		$45.00	$42.50	Batch# 20		
2/11/2021 4:55:57 PM EST	Success	Return	20210211000286		-$2.50	$42.50	Batch# 20	test refund batch emails	

The Completed Payments table allows payments to be refund. It also allows payment notification messages to be resent.

In the Completed Payments section you can view the name of the individual who initiated the return (in the Refunded By column) as well as the return reason description (in the Refund Reason column), if the user who initated the refund entered a reason for the refund.

For completed payments, you can select the Refund link in the Action dropdown menu to initiate the refund process.You will be redirected to the Refunds page. You can also select a link in the Resend Email/Text column in order to resend the specificed type of payment notification message.

About Refunds & ACH

ACH transactions must be "settled" in Payment Gateway before they can be refunded in Marketplace. For schools that use Heartland Payment Systems as the processor, TouchNet automatically marks ACH batches as settled.

However, schools that originate their own ACH batch files should ensure that either …

- Payment Gateway has been configured to automatically settle ACH batches after the ACH wait days period has expired

  OR

- a Payment Gateway administrator periodically logs into the Payment Gateway Operations Center and manually marks ACH batches as settled (typically after the school's bank has completed processing of all transactions in a batch).

If you do not know how ACH transactions are handled regarding batch settlement, we recommend you contact your Payment Gateway administrator.

Refunding uPay Payments

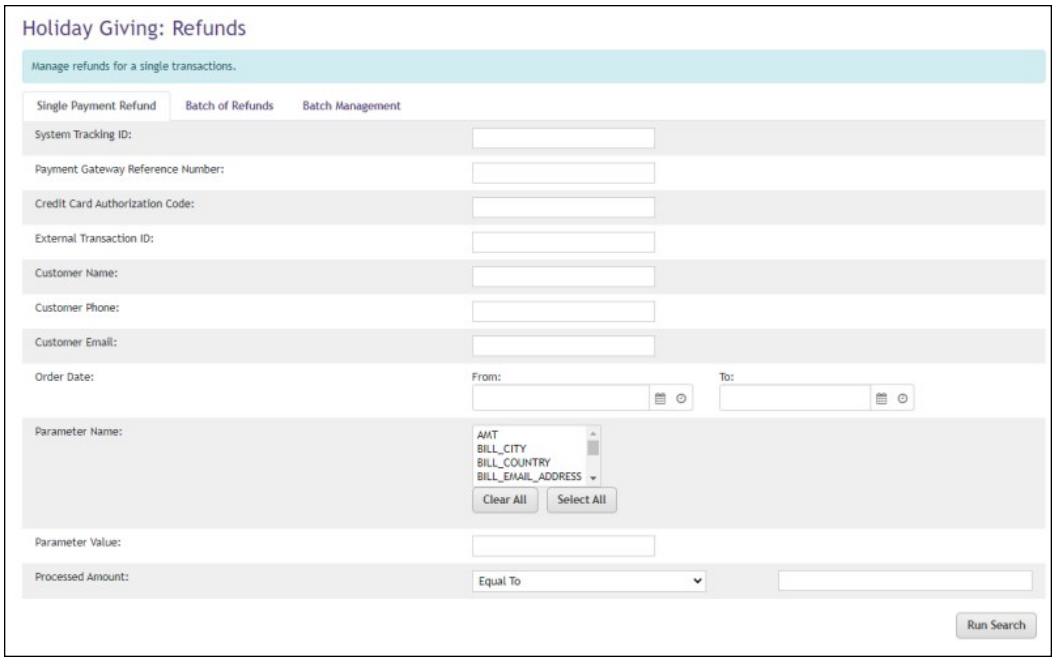
With Marketplace 8, a new Refunds option has been added for uPay. This new feature provides the ability to process single refunds as well as batch uPay payments for refunding. This gives Marketplace administrators the ability to search for and refund a single payment, or a group of payments using a variety of filters that you can select.

There is also a new Batch Management feature for uPay refunds to give administrators the ability to search for a particular batch and manage the refunds within a batch.

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Recurring payments can be refunded. TLink payments (recurring and single payments) can also be refunded (batch or single refunds).

To access the Refunds page: Navigate to Marketplace Home > [merchant name] > uPay Sites > [uPay site name] > Refunds. The Refunds page displays.



The Refunds page. The Single Payment Refund tab is the default view.

The Refunds page has three tabs:

- Single Payment Refund
- Batch of Refunds
- Batch Management

Creating a Single Payment Refund

Using the Single Payment Refund view, you can search for and refund the entire amount or a portion of a uPay payment. Use the search fields to enter a variety of search criteria to help you locate the desired payment. From the Single Payment Refund view you can process refunds either for payment card payments or ACH payments.

Note: uPay site managers and uPay payment clerks can also process refunds.

To refund a single payment, follow these steps.

1. From the Refunds page, verify you are on the default Single Payment Refund view. (The Single Payment Refund is the default view.)
2. Search for the payment you wish to refund by completing the desired search fields. These search fields are not required, but entering search

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criteria will help to narrow your results. Here are the available search fields, including a short explanation for each field.

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 the 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.

Credit Card Authorization Code

The payment 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.

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 paymentusing this value.

Customer Name

The name entered by the customer as the billing name when the payment was submitted.

Customer Phone Number

The phone number entered by the customer during the uPay payment process.

Customer Email

The e-mail address entered by the customer during the uPay payment process.

Order Date

The date and time that the customer submitted the payment. If you want to search by Order Date and Time, you can enter a date range by using the From and To fields. You can select a date and/or time by selecting the calendar or clock icons.

Parameter Name

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All additional form parameters configured for this uPay site are listed in this field. If you select one of these parameter names, all search results will include that parameter name. You can hold the CTRL key and click multiple items. You can also hold the SHIFT key to select a group of adjacent items.

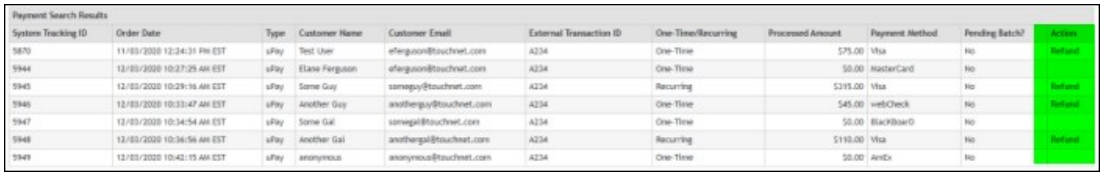
Parameter Value

For all additional form parameters configured for all uPay sites, you can search for any specific parameter value that was passed to uPay. (For example, if the Parameter Name of CAMPUS_TRANS_ID was passed, you could search for a specific campus transaction ID, such as "345236," or if the Parameter Name of AMT was passed, you could search for a specific amount, such as "50.00."

Processed Amount

If you know the exact payment amount you are searching for you can enter it in this field, or you can select a payment range by enter a payment amount and selecting the desired range (less than or greater than) from the dropdown menu.

3 Once you have entered all the desired search criteria, click the Run Search button. The Payment Search Results display at the bottom of the page.


Payment Search Results

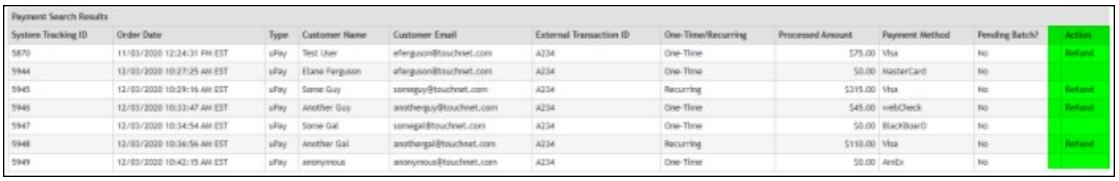
System Tracking ID	Order Date	Type	Customer Name	Customer Email	External Transaction ID	One-Time/Recurring	Processed Amount	Payment Method	Pending Batch?	Action
5870	11/03/2020 12:24:31 PM EST	uPay	Test User	eferguson@touchnet.com	A234	One-Time	$75.00	Visa	No	Refund
5944	12/03/2020 10:27:25 AM EST	uPay	Elane Ferguson	eferguson@touchnet.com	A234	One-Time	$0.00	MasterCard	No	
5945	12/03/2020 10:29:16 AM EST	uPay	Some Guy	someguy@touchnet.com	A234	Recurring	$315.00	Visa	No	Refund
5946	12/03/2020 10:33:47 AM EST	uPay	Another Guy	anotherguy@touchnet.com	A234	One-Time	$45.00	webCheck	No	Refund
5947	12/03/2020 10:34:54 AM EST	uPay	Some Gal	somegal@touchnet.com	A234	One-Time	$0.00	BlackBaud	No	
5948	12/03/2020 10:36:56 AM EST	uPay	Another Gal	anothergal@touchnet.com	A234	Recurring	$110.00	Visa	No	Refund
5949	12/03/2020 10:42:15 AM EST	uPay	anonymous	anonymous@touchnet.com	A234	One-Time	$0.00	AmEx	No	

The Payment Search Results

The payment search results include the Pending Batch field and the Action field. The Pending batch field displays a Yes or No, to indicate if the payment is included in a pending batch. If the payment is eligible to be refunded, the Refund link displays in the Action column.

Note: Refunds for one time or recurring payments can be completed using the refund action.

4 Locate the desired single payment and click the Refund action link.


Payment Search Results

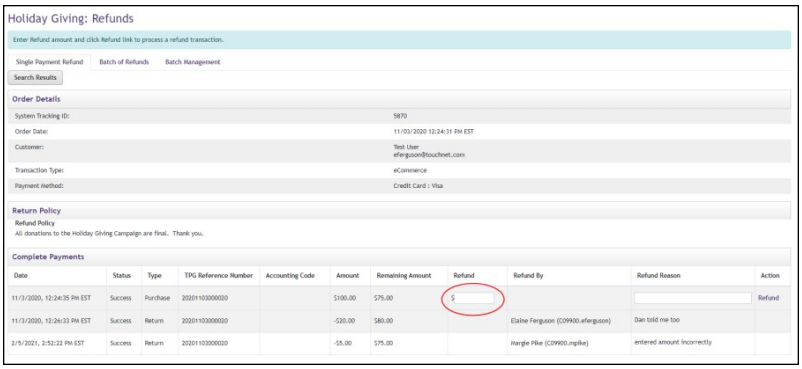
System Tracking ID	Order Date	Type	Customer Name	Customer Email	External Transaction ID	One-Time/Recurring	Processed Amount	Payment Method	Pending Batch?	Action
5870	11/03/2020 12:24:31 PM EST	uPay	Test User	eferguson@touchnet.com	A234	One-Time	$75.00	Visa	No	Refund
5944	12/03/2020 10:27:25 AM EST	uPay	Elane Ferguson	eferguson@touchnet.com	A234	One-Time	$0.00	MasterCard	No	
5945	12/03/2020 10:29:16 AM EST	uPay	Some Guy	someguy@touchnet.com	A234	Recurring	$315.00	Visa	No	Refund
5946	12/03/2020 10:33:47 AM EST	uPay	Another Guy	anotherguy@touchnet.com	A234	One-Time	$45.00	webCheck	No	Refund
5947	12/03/2020 10:34:54 AM EST	uPay	Some Gal	somegal@touchnet.com	A234	One-Time	$0.00	BlackBaud	No	
5948	12/03/2020 10:36:56 AM EST	uPay	Another Gal	anothergal@touchnet.com	A234	Recurring	$110.00	Visa	No	Refund
5949	12/03/2020 10:42:15 AM EST	uPay	anonymous	anonymous@touchnet.com	A234	One-Time	$0.00	AmEx	No	

Click the desired Refund link

5 The Refunds page for the selected payment displays. Review the order details to ensure you are refunding the correct payment. In the

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Complete Payments section, enter the desired refund amount in the Refund field.



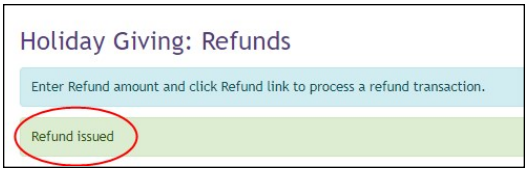
Enter the desired refund amount

6 Enter the applicable reason for the refund in the Refund Reason field.



Enter the applicable refund reason

7 Click the Refund link in the Action column. If the refund was processed successfully, a "Refund issued" message displays at the top of the page.



Refund issued successfully message

The single refund is completed. You can return to the Search Results page to select another single refund.

Important! **Notes about Single Payment Refunds**

- If multiple account codes were passed to uPay, separate amounts can be refunded for each accounting code.

- ACH transaction can only be refunded after these transactions have settled.

- 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. When you process a refund, the money flows from that bank account back to the user's account.

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Creating a Batch of Refunds

From the Batch of Refunds view you can search for groups of payments to include in a batch refund using a variety of search options. Once you have selected the desired payments, you can create the refund batch and define the refund parameters for the batch. You will also be able to schedule a batch refund for a selected date and time in the future.

Important! Notes about Batch Refunds:

• Once a batch is created, payments cannot be added to the batch. Payments can be removed from the batch once it is created via the edit batch process.

• If a refunded amount is specified that is more than one of the payments selected for a batch, an error displays indicating "*System Tracking ID(s) with Processed Amounts less than specified refund amount. Please correct*." and the batch will not generate.

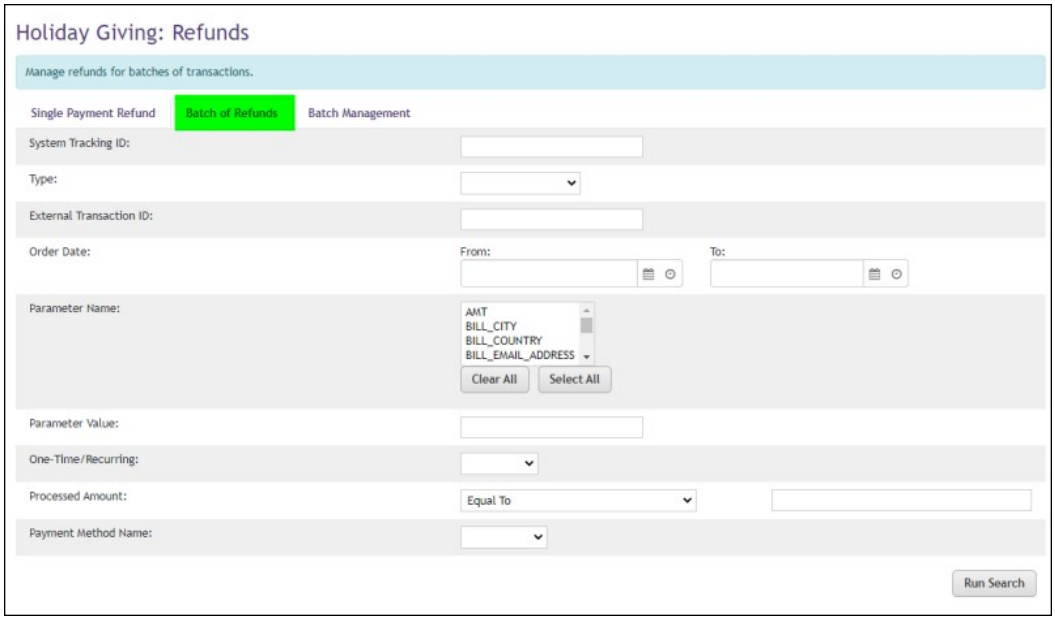
• If a single payment refund is completed against a payment included in a pending batch and the pending batch is subsequently submitted, the batch will try to process using the batch parameters. If the batch specified a refund amount and that is now greater than the remaining balance, the refund will fail. If the batch is to refund the full amount, it will refund the updated remaining balance.

• If you want to look at the details of a specific payment to determine if it should be included in a batch you can click on the System Tracking ID hyperlink and a pop-up window will appear with the order deatils.

To create the desired refund batch, you will first need to search for the payments to include in the batch. Follow these steps to search for the desired payments.

1 Click on the Batch of Refunds tab. The Batch of Refunds view displays.

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The Batch of Refunds view

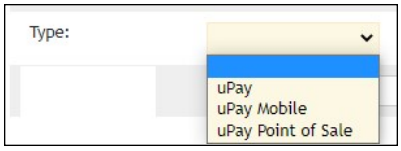
2 Just like single payment refunds, you are able to search for payments using a variety of filters. To search for payments to include in the batch of refunds, enter the desired search criteria in these fields.

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).

Type

Select the desired type of uPay payment from the dropdown menu.



Type field dropdown menu

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.

Order Date

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The date and time that the customer submitted the payment. If you search by Order Date and Time, you must enter a date range by using the From and To fields. You can select a date and time by selecting the calendar or clock icons.

Parameter Name

All additional form parameters configured for this uPay site are listed in this field. If you select one of these parameter names, all search results will include that parameter name. You can hold the CTRL key and click multiple items. You can also hold the SHIFT key to select a group of adjacent items.

Parameter Value

For all additional form parameters configured for all uPay sites, you can search for any specific parameter value that was passed to uPay. (For example, if the Parameter Name of CAMPUS_TRANS_ID was passed, you could search for a specific campus transaction ID, such as "345236," or if the Parameter Name of AMT was passed, you could search for a specific amount, such as "50.00."

One-Time/Recurring

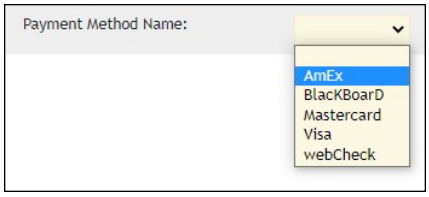
Select to search for a one-time payment or a recurring payment from the dropdown menu.

Processed Amount

If you know the exact payment amount you are searching for you can enter it in this field, or you can select a payment range by entering a payment amount and selecting the desired range (less than or greater than) from the dropdown menu.

Payment Method Name

Select the desired payment method from the dropdown menu.



Payment Method dropdown menu

3 Once you have entered all the desired search criteria, click the Run Search button. The Payment Search Results display at the bottom of the page.

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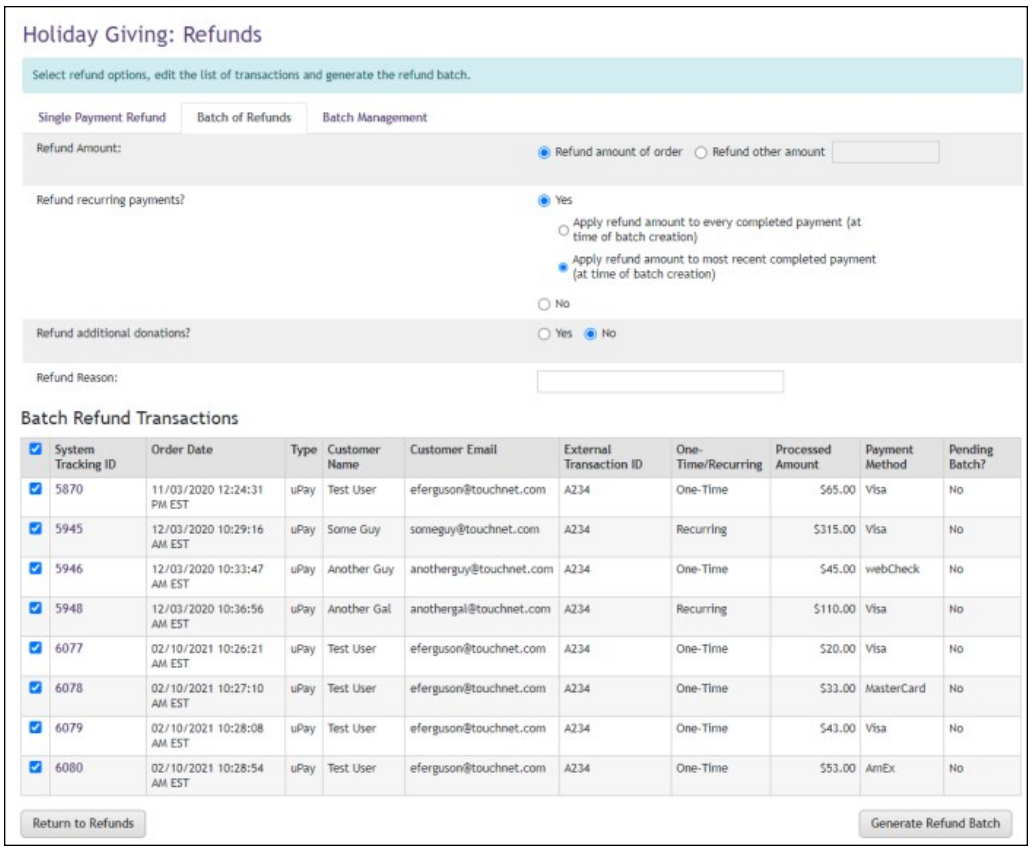
Payment Search Results

System Tracking ID	Order Date	Type	Customer Name	Customer Email	External Transaction ID	One-Time/Recurring	Processed Amount	Payment Method	Pending Batch?
5870	11/03/2020 12:24:31 PM EST	uPay	Test User	eferguson@touchnet.com	A234	One-Time	$65.00	Visa	No
5944	12/03/2020 10:27:25 AM EST	uPay	Elane Ferguson	eferguson@touchnet.com	A234	One-Time	$0.00	MasterCard	No
5945	12/03/2020 10:29:16 AM EST	uPay	Some Guy	someguy@touchnet.com	A234	Recurring	$315.00	Visa	No
5946	12/03/2020 10:33:47 AM EST	uPay	Another Guy	anotherguy@touchnet.com	A234	One-Time	$45.00	webCheck	No
5947	12/03/2020 10:34:54 AM EST	uPay	Some Gal	somegal@touchnet.com	A234	One-Time	$0.00	BlackBoarD	No
5948	12/03/2020 10:36:56 AM EST	uPay	Another Gal	anothergal@touchnet.com	A234	Recurring	$110.00	Visa	No
5949	12/03/2020 10:42:15 AM EST	uPay	anonymous	anonymous@touchnet.com	A234	One-Time	$0.00	AmEx	No

Batch of Refunds Payment Search Results

Note: Payments that have a $0 remaining balance will be displayed in the search results but will not be included in the batch creation, as they cannot be refunded.

4 Review the payments in the search results. Click the Create Refund Batch button. The page is refreshed to show the The Batch Refund Transactions view.



System Tracking ID	Order Date	Type	Customer Name	Customer Email	External Transaction ID	One-Time/Recurring	Processed Amount	Payment Method	Pending Batch?
5870	11/03/2020 12:24:31 PM EST	uPay	Test User	eferguson@touchnet.com	A234	One-Time	$65.00	Visa	No
5945	12/03/2020 10:29:16 AM EST	uPay	Some Guy	someguy@touchnet.com	A234	Recurring	$315.00	Visa	No
5946	12/03/2020 10:33:47 AM EST	uPay	Another Guy	anotherguy@touchnet.com	A234	One-Time	$45.00	webCheck	No
5948	12/03/2020 10:36:56 AM EST	uPay	Another Gal	anothergal@touchnet.com	A234	Recurring	$110.00	Visa	No
6077	02/10/2021 10:26:21 AM EST	uPay	Test User	eferguson@touchnet.com	A234	One-Time	$20.00	Visa	No
6078	02/10/2021 10:27:10 AM EST	uPay	Test User	eferguson@touchnet.com	A234	One-Time	$33.00	MasterCard	No
6079	02/10/2021 10:28:08 AM EST	uPay	Test User	eferguson@touchnet.com	A234	One-Time	$43.00	Visa	No
6080	02/10/2021 10:28:54 AM EST	uPay	Test User	eferguson@touchnet.com	A234	One-Time	$53.00	AmEx	No

The Batch Refund Transactions view

5 From this view you can set the refund parameters and select or deselect the payments from the batch and generate the batch. Select the following parameters.

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Note: The payments information displayed in the Batch Refund Transaction section of the page changes based on the parameters you select.

Refund Amount

You can select to refund the remaining amount of the payment or a specified amount.

Important! If you specify the amount of refund and a selected payment has multiple accounting codes, the batch refund process will credit the accounting codes sequentially; exhausting one before moving on to the next. For example:

•$100 payment split $50 to MISC and $50 to STAX. If a $50 refund was specified then $50 of accounting code MISC would be refunded and none of STAX.

•$100 payment split $50 to MISC and $50 to STAX. If a $75 refund was specified then $50 of accounting code MISC and $25 of accounting code STAX would be refunded.

Refund recurring payment?

Yes – The default selection is Yes (to refund recurring payments in the batch). You can also select to apply the refund amount to every completed payment (as of the time of the batch creation) or only to apply the refund amount to the most recent completed payment (as of the time of the batch creation).

No – Select the NO radio button If you do NOT want to refund recurring payments in the batch.

Important! For recurring payments the batch will only include completed payments at the time the batch is created. Subsequent completed recurring payments will not be recognized in that batch.

If the Refund Recurring Payments parameter is set to No the recurring payments initially included in the batch will be hidden from the display and not included in the batch generation step.

Once a batch is created, the "Refund recurring payments?" setting cannot be altered because it could cause payments to be added to a batch.

Refund additional donations?

Click the Yes radio button if you want to include additional donations associated with a payment to be refunded. The default selection is No.

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Refund Reason

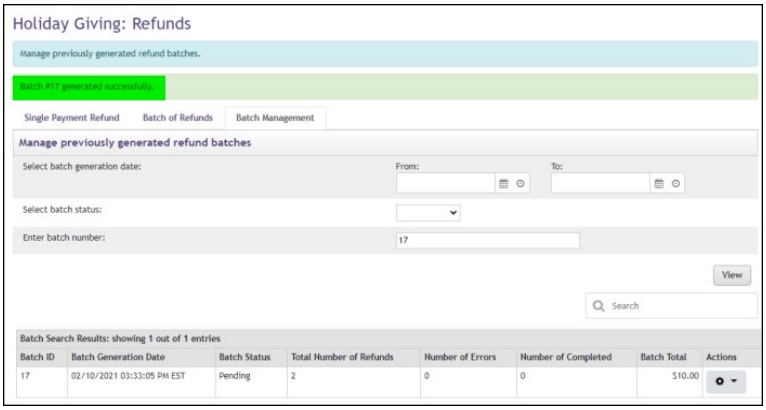
Enter a refund reason that will be associated with each refund included in the batch. This is an optional entry.

6 Once you have selected all the desired batch refund parameters, click the Generate Refund Batch button.

Note: All batches are generated in a Pending status.

7 A message displays at the top of the Refunds page indicating the batch was generated successfully. The message includes the batch number. The Batch Management view is displayed.

Important! The batch will be created in a **Pending** status and will not be automatically run. You will need to Schedule or Submit the batch using the Action dropdown menu.



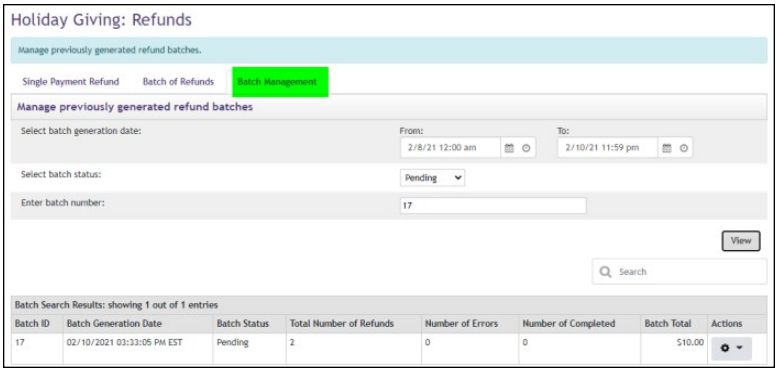
The Batch Successfully generated message

Viewing and Managing Batches

Use the Batch Management view to search for and manage previously generated refund batches. Just like the single and batch refund views, you can search for payments and batches using a variety of search criteria.

1 Select the Batch Management tab. The Batch Management view displays.

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The Batch Management view

2 To search for a refund batch, enter your selection(s) in the following fields.

Select batch generation date

Use the From and To fields to locate the desired batch(es) by the date it was generated. You can select a date and time by selecting the calendar and/or clock icons.

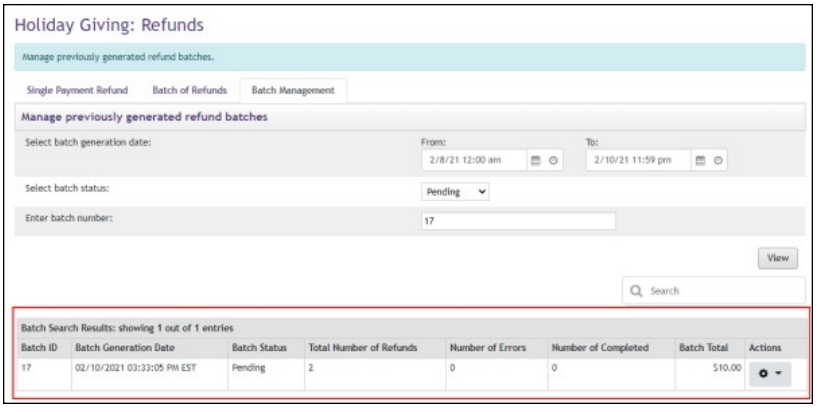
Select batch status

Use the dropdown to select the desired status. You can search for all refund batches that have been created or you can narrow your search by one of the following statuses: Pending, Processing, Completed, Scheduled, Cancelled.

Enter batch number

To search for a specific batch, enter the desired batch number.

3 Once you have selected all the desired batch refund search parameters, click the View button. The Batch Search Results display at the bottom of the page.



The Batch Search Results section

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The Batch Search Results include information based on your search selections. The search results include the following details about each refund batch:

- Batch ID
- Batch Generation Date
- Batch Status
- Total Number of Refunds
- Number of Errors
- Number of Completed (Payments)
- Batch Total
- Actions - the Actions that can be performed for a batch depend on the status of the refund batch.

Performing Actions for a Refund Batch

From the Batch Search Results section, you can also perform a number of actions on a refund batch, based on the Batch Status. The following table lists the applicable Batch Status and the associated actions that can be performed for the batch.

Batch Status	Actions
Pending	• Edit • Cancel • Schedule • Submit • Batch History
Processing	• Processing Status • Batch History
Completed	• Batch History • Batch Success Report • Batch Errors Report
Scheduled	• Unschedule • Batch History
Cancelled	• Batch History

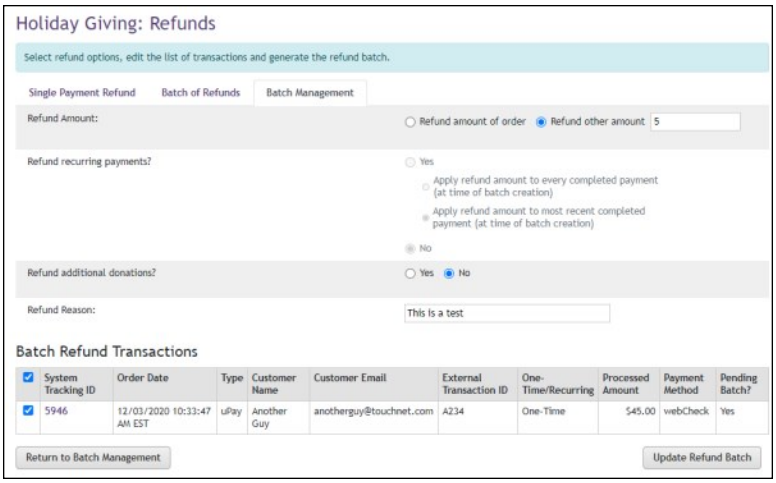
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Actions

The following describes the actions that are available for refund batches, based on the Batch Status.

Edit

If the Edit action is selected for a Pending refund batch, the Batch Refund Transactions display. You can edit the Refund Amount, Refund Additional Donations?, and Refund Reason parameters. You can also uncheck the individual refund transactions to exclude it from the batch. Once you have completed the desired parameters, click the Update Refund Batch button to accept your changes. An "updated successfully" message displays at the top of the page.

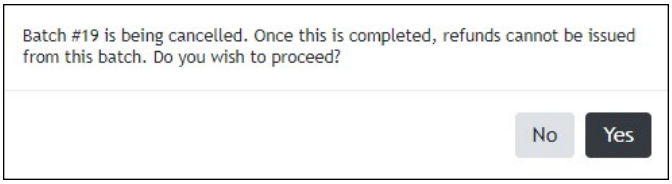


> ***Important!*** **Notes about the Edit Action**
>
> • The Refund Recurring Payment parameter cannot be edited.
>
> • Payments can be removed from a batch, but they cannot be added to a batch using the Edit action.
>
> • Payments at the time the batch was created are included (not at the time it was edited).

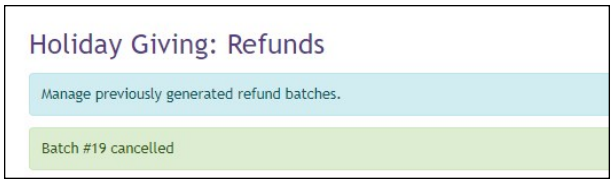
Cancel

If you select the Cancel action for a Pending refund batch, a popup window displays to confirm that you wish to cancel the pending refund batch.

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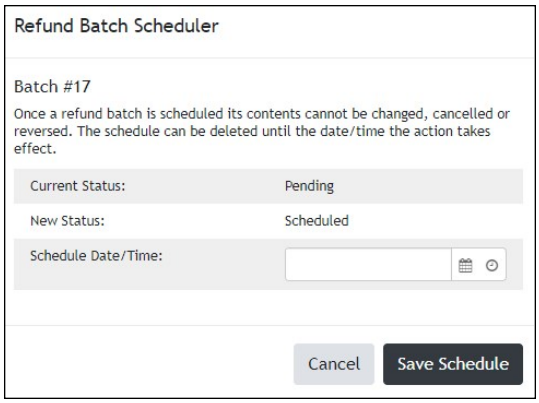


If Yes is selected, a message displays at the top of the Batch Management view indicating the batch was cancelled. No additional action can be taken on this batch.



Schedule

If you select the Schedule action for a Pending refund batch, the Refund Batch Scheduler window displays. Select the desired date and time that you wish the refunds to be processed and click the Save Schedule button.



The batch status will be changed to Scheduled.

When the specified date and time occur, Marketplace will kick off the batch, moving the batch to Processing status and submitting the refunds to the appropriate payment gateway for processing.

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Important! **Notes about the Schedule Action**

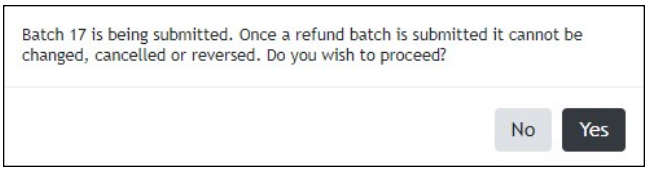
• Once a batch has been scheduled, you can Unschedule it if you no longer wish to process the refund at the date and time you previously scheduled it.

• Unschedule – The action dropdown will include the Unschedule option once you Schedule the refund batch. If you select the Unschedule action, a popup window displays to confirm the batch is being removed from a schedule.

• Unscheduling a batch will return it to Pending status.

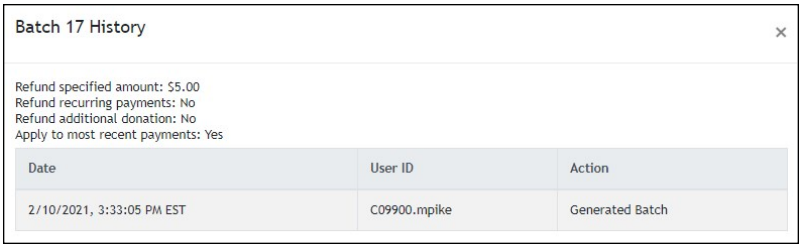
Submit

The Submit action displays a popup window to confirm you want to submit the refund batch. Once you confirm the submit action, no changes can be made to the batch and it cannot be cancelled. Confirming the submit action moves the batch to a Processing status. Marketplace will begin to submit the refunds to the appropriate payment gateway for processing.



Batch History

Batch History reporting can be accessed for any batch, regardless of status. The history lists the parameters of the batch as well as each action taken onthe batch by user and date and time.



Processing Status

While in Processing status, you can check the Processing Status via the action dropdown. A pop-up window displays showing the total number transactions, how many are completed, in error, and remain to be submitted. To get updated statuses you can re-execute the submit action.

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Batch Success Report

The Batch Success report can be downloaded as a .CSV file and will include details about the payment successfully refunded. If no payments were successfully refunded during the processing of a batch this report will not display in the Action dropdown menu.

Batch Error Report

The Batch Error report can be downloaded as a .CSV file and will include details about payments that could not be refunded. If errors were not encountered during processing of a batch, this report will not display in the Action dropdown menu.

11.10 Resending Purchase and Refund Notifications

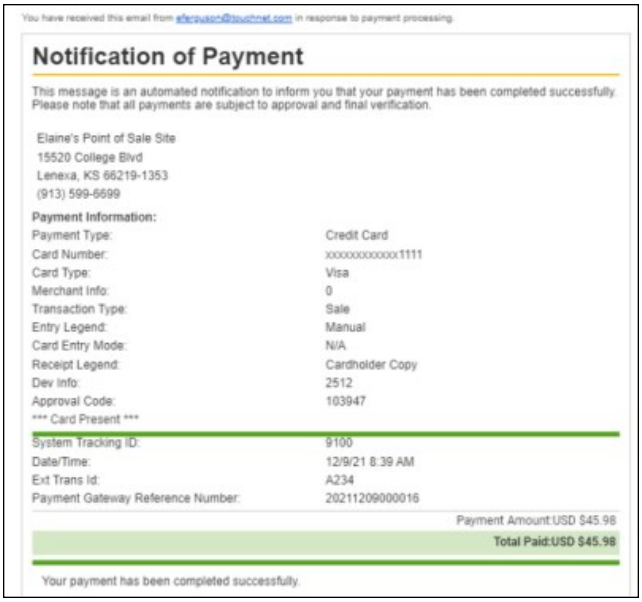
Users with the uPay site manager, merchant manager, and uPay site payment clerk roles can resend purchase (payment) and refund notifications when necessary.

With Feature Pack 8.3, uPay POS receipts for both purchases and refunds, as well as resent receipts, will now include:

- Site Name
- Site Location Address 1
- Site Location Address 2, if populated
- Site Location City, State, and Postal Code
- Site Location Phone Number

Note: If the merchant name and address are not present, those fields will be suppressed on the receipt.

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You have received this email from eferguson@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.

Elaine's Point of Sale Site
15520 College Blvd
Lenexa, KS 66219-1353
(913) 599-6699

Payment Information:

Payment Type:	Credit Card
Card Number:	xxxxxxxxxxxx1111
Card Type:	Visa
Merchant Info:	0
Transaction Type:	Sale
Entry Legend:	Manual
Card Entry Mode:	N/A
Receipt Legend:	Cardholder Copy
Dev Info:	2512
Approval Code:	103947
*** Card Present ***	
System Tracking ID:	9100
Date/Time:	12/9/21 8:39 AM
Ext Trans Id:	A234
Payment Gateway Reference Number:	20211209000016

Payment Amount:USD $45.98

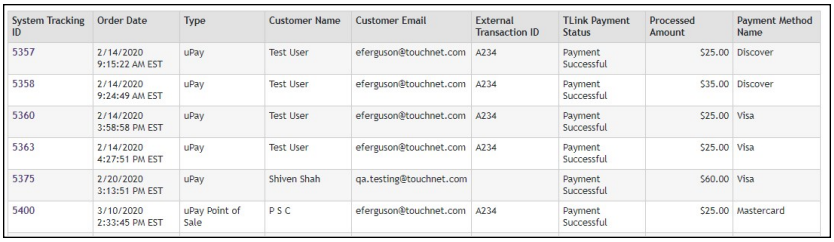
Total Paid:USD $45.98

Your payment has been completed successfully.

Note: For recurring payments you can only resend the refund notification. For one-time payments you can resend both the purchase payment and the refund notification.

To resend a notification, follow these steps:

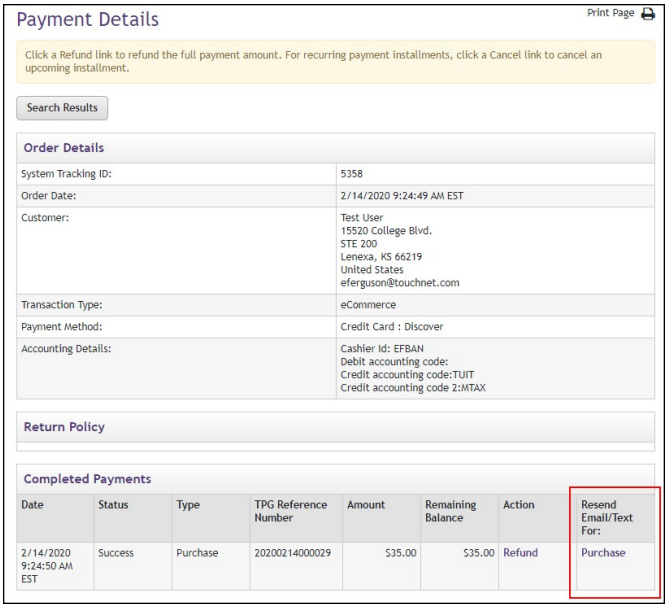
1. Navigate to Marketplace Home > [merchant name] > uPay Sites > [uPay site name] > Payment Search. The Payment Search appears.
2. Enter the desired payment search criteria and click the Run Search button. The Payment Search page is updated to display the orders that meet the criteria that you entered.



System Tracking ID	Order Date	Type	Customer Name	Customer Email	External Transaction ID	TLink Payment Status	Processed Amount	Payment Method Name
5357	2/14/2020 9:15:22 AM EST	uPay	Test User	eferguson@touchnet.com	A234	Payment Successful	$25.00	Discover
5358	2/14/2020 9:24:49 AM EST	uPay	Test User	eferguson@touchnet.com	A234	Payment Successful	$35.00	Discover
5360	2/14/2020 3:58:58 PM EST	uPay	Test User	eferguson@touchnet.com	A234	Payment Successful	$25.00	Visa
5363	2/14/2020 4:27:51 PM EST	uPay	Test User	eferguson@touchnet.com	A234	Payment Successful	$25.00	Visa
5375	2/20/2020 3:13:51 PM EST	uPay	Shiven Shah	qa.testing@touchnet.com		Payment Successful	$60.00	Visa
5400	3/10/2020 2:33:45 PM EST	uPay Point of Sale	P S C	eferguson@touchnet.com	A234	Payment Successful	$25.00	Mastercard

3. Locate the payment in the displayed list and select its System Tracking ID link. The payment details page displays.

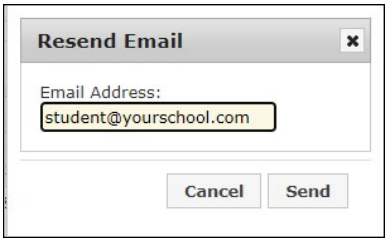
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4 The Completed Payments table shows payment details. The "Resend Email/Text For" column lists the purchase or refund that is available to resend. To resend a purchase or refunds notification, click the link.

Remember: For recurring payments you can only resend the refund notification. For one-time payments you can resend both the purchase (payment) and the refund notification.

5 A Resend Email popup box displays. The email address is pre-populated with the buyer's email address or you can enter the applicable email address to resend the notification.



6 Click Send. The notification is sent.

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.

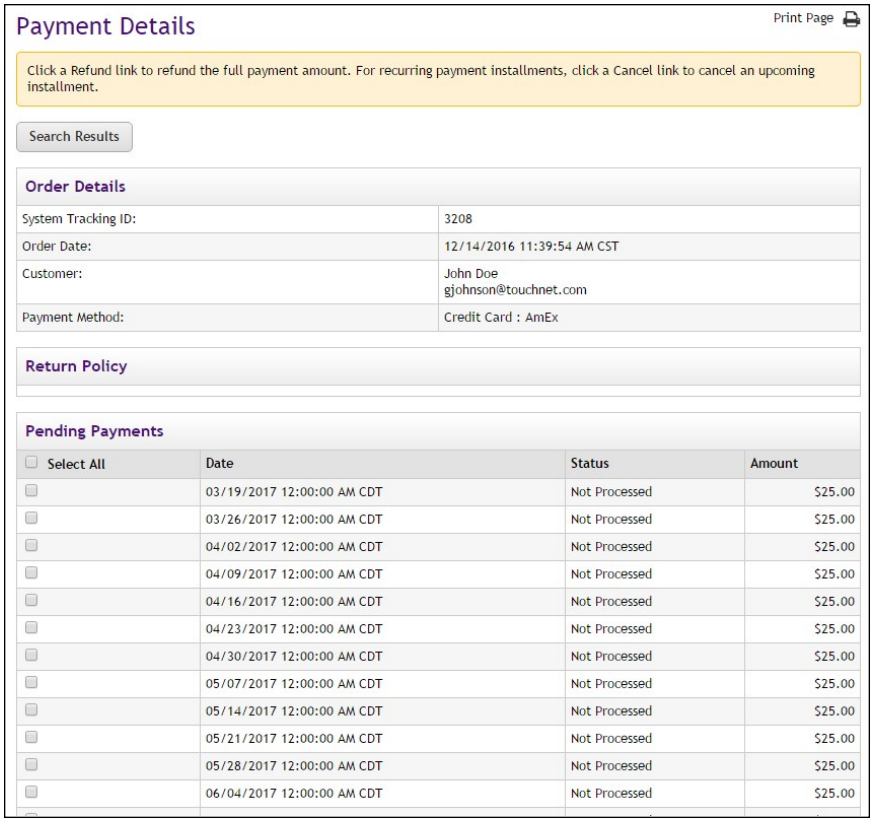
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2 Search for the payment to refund (as described in **"To view the Payment Search page, make the following selections in the left navigation menu:" on page 578**).

3 In search results, click the payment's system tracking ID. The Payment Details page appears.

4 Select the corresponding checkbox for each pending payment that you need to cancel.

5 Click the Cancel Payment button.



Payment details showing a recurring payment, with individual, future payments that can be cancelled.

Note: uPay does not allow any changes to be made to the customer's payment information. However, a uPay site manager can cancel specific pending recurring payments. Therefore, if a customer would like to make changes to the payment information for scheduled recurring payments (e.g. entering a new payment card number), the uPay site manager can offer the following alternative to the customer: 1) the uPay site manager can cancel all remaining payments for the customer, and 2) the customer can create a recurring payment schedule, using the new payment information.

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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 recurring payments are established, the customer receives an e-mail message after each subsequent payment takes place. These e-mail messages are sent in HTML format.

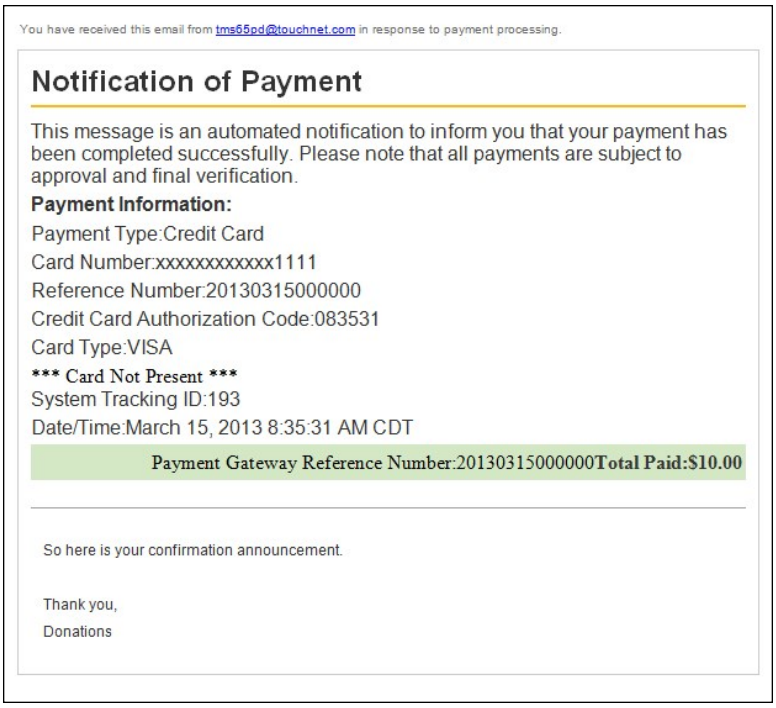
uPay site managers can be notified by e-mail when transactions take place. This configuration is located on the Update Profile page for each user. For more information about how to set up site managers for notifications, see **"Your User Profile" on page 26**.

In addition, if there are errors with recurring payments, an error message is sent to the e-mail address is configured in the *tmsrecur.prp* file and was established when Marketplace was installed. If you need to change this e-mail address, please contact TouchNet Customer Care.

Note: E-mail notification messages sent from the TouchNet Data Center's test environment include the word "TEST" in the message subject.

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 tms65pd@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:xxxxxxxxxxxx1111
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

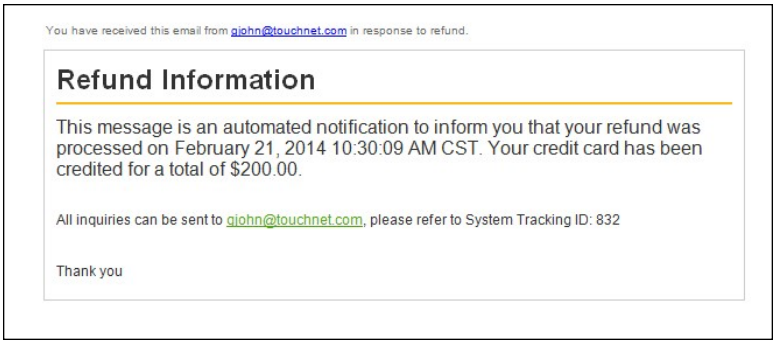
Payment Gateway Reference Number:20130315000000Total Paid:$10.00

So here is your confirmation announcement.

Thank you,
Donations

Here is an example of a refund message:

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You have received this email from gjohn@touchnet.com in response to refund.

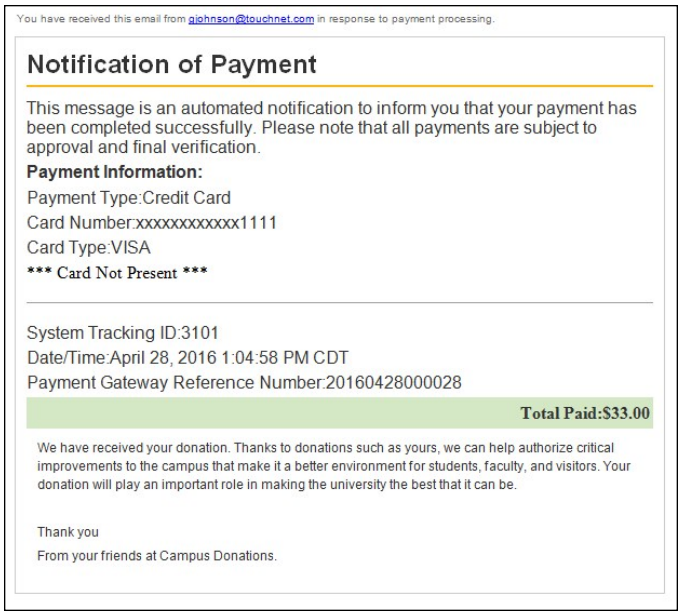
Refund Information

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 payment notification message:


You have received this email from gjohnson@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:xxxxxxxxxxxx1111
Card Type:VISA
*** Card Not Present ***

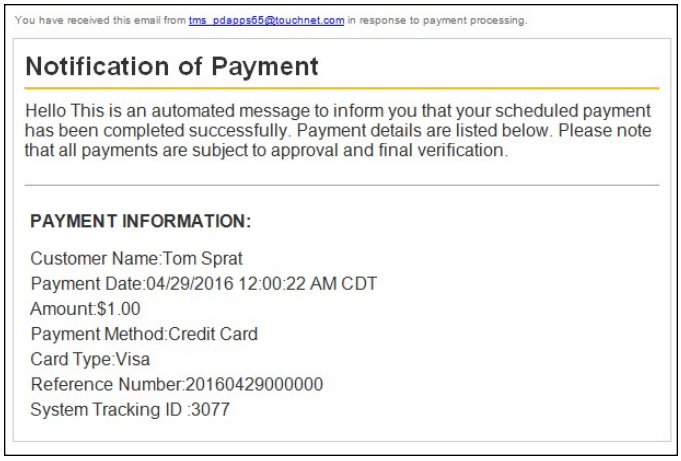
System Tracking ID:3101
Date/Time:April 28, 2016 1:04:58 PM CDT
Payment Gateway Reference Number:20160428000028

Total Paid:$33.00

We have received your donation. Thanks to donations such as yours, we can help authorize critical improvements to the campus that make it a better environment for students, faculty, and visitors. Your donation will play an important role in making the university the best that it can be.

Thank you
From your friends at Campus Donations.

Here is an example of a recurring payment message:


You have received this email from tms_pdapps65@touchnet.com in response to payment processing.

Notification of 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 INFORMATION:

Customer Name:Tom Sprat
Payment Date:04/29/2016 12:00:22 AM CDT
Amount:$1.00
Payment Method:Credit Card
Card Type:Visa
Reference Number:20160429000000
System Tracking ID :3077

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12.2 Editing uPay E-mail Messages

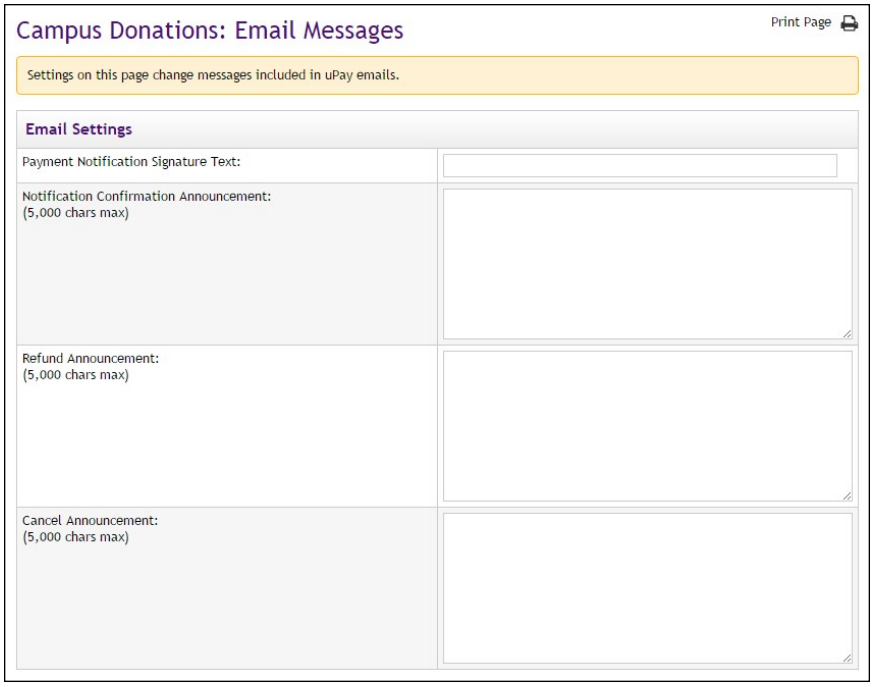
You can add text to several types of uPay site e-mail messages: payment confirmations, refund confirmations, and cancellation confirmations. In addition, your can add text to several types of recurring payment e-mail messages.

The Payment Notification Signature Text is used with all store e-mail messages. In addition, each message type has its own announcement field, so you can customize a message based on the needs of each message type.

Note: These fields do not accept HTML. Your entries must be text only.

You can add text to your uPay site's e-mail messages by using these instructions:

1 From the left navigation menu, navigate to Marketplace Home > [merchant] > uPay Sites > [uPay site name] > Email Messages. The Email Messages page appears.



These fields appear at the top of the uPay Email Messages page.

2 The Payment Notification Signature Text appears as a single line at the bottom of uPay notification e-mail messages, immediately below the words "Thank you." If you make no entry in this field (the field is empty by default), then the uPay site name appears. For an example of the order confirmation e-mail message, see **"Examples of E-mail Messages" on page 603**.

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3 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. For an example of the order confirmation e-mail message, see **"Examples of E-mail Messages" on page 603**

4 The text entered in this field will appear on e-mail refund messages. For an example of the fulfillment e-mail message, see **"Examples of E-mail Messages" on page 603**

5 The text entered in this field will appear on e-mail cancellation messages. For an example of the cancellation e-mail message, see **"Examples of E-mail Messages" on page 603**

6 The fields described above are the basic fields that should be configured for all uPay sites. In addition, if your uPay site accepts recurring payments, you should complete the Recurring Payments fields.

7 Click the Save button.

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	The e-mail address entered in the "Site E-mail Address" field on the uPay site's Miscellaneous Settings page. If no e-mail address is entered in the "Site E-mail Address" field, then the e-mail address named in the uPay *critical.prp* file will be used. (The e-mail address in the *critical.prp* file was named when Marketplace was set up. If this address must be changed, you should contact TouchNet Customer Care.)
Recurring payment confirmation	The e-mail address named in the AliveCheck.mail.from field of the *tmsrecur.prp* file.

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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. This e-mail address was established when Marketplace was installed. If you need to modify this e-mail address, please contact TouchNet Customer Care.

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Part 5:
General Ledger Information

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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 stores 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
- Workday

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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, taxes, and delivery methods.

Banner Detail Codes must also be associated in Payment Gateway with each linked payment method.

When transactions take place in Marketplace, Banner Detail Codes and Cashier IDs are thus communicated to Banner for use in its general ledger module.

The configuration steps for establishing general ledger integration between Banner by Ellucian and Marketplace (as well as configuration steps in Payment Gateway) are described in the following sections.

Steps for Banner Setup

The following steps summarize how to establish general ledger integration for Banner by Ellucian.

1. A Payment Gateway administrator configures the linked payment methods for the Host System Account. See **"Configuring Payment Methods in Payment Gateway" on page 612**.
2. A Marketplace administrator creates common accounting codes. See **"Configuring System Administration Settings" on page 617**.
3. A Marketplace administrator assigns a common accounting code to each tax class. See **"Tax Account Codes" on page 619**.
4. A Marketplace administrator enters a default cashier ID. See **"Default Cashier ID" on page 619**.
5. For each Marketplace merchant, a merchant manager selects which common accounting codes will be used by the merchant. See **"Configuring Merchant Settings" on page 620**
6. 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 and product modifiers, 4) override accounting codes for delivery methods, and 5) accounting codes for tax classes. See **"Merchant Accounting Codes" on page 621**.
7. For each Marketplace merchant, a merchant manager can assign an accounting code to each tax class. See **"Tax Account Codes" on page 622**

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8 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 623**.

9 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 624**.

10 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 627**.

14.1 Configuring Payment Methods in Payment Gateway

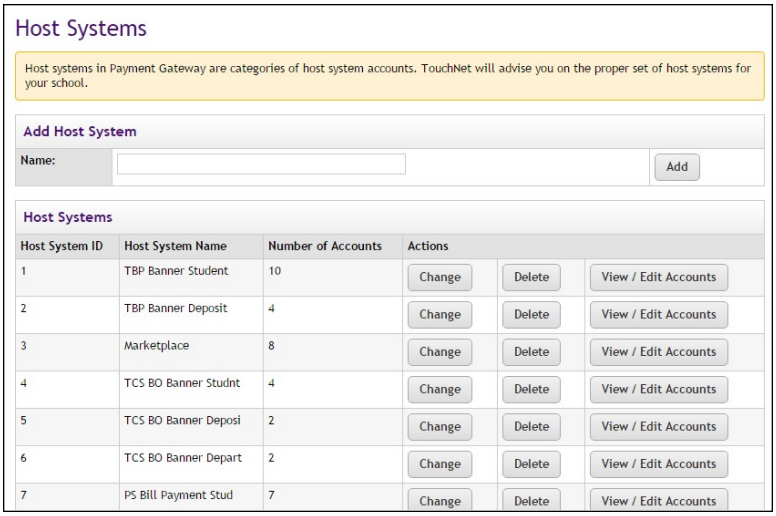
Before you configure Marketplace for general ledger integration, you should start with the debit side of the transaction as represented by the available payment methods that will be offered by a Marketplace merchant. In Payment Gateway, you must configure each payment method with a Detail Code. (In contrast, the configuration in Marketplace represents the credit side of the transaction.)

Steps for Payment Method Configuration

To configure Payment Gateway with Detail Codes for each payment method, follow these steps:

1 Launch Payment Gateway.

2 Navigate to Commerce Configuration > Host Systems. The Host Systems page then appears.

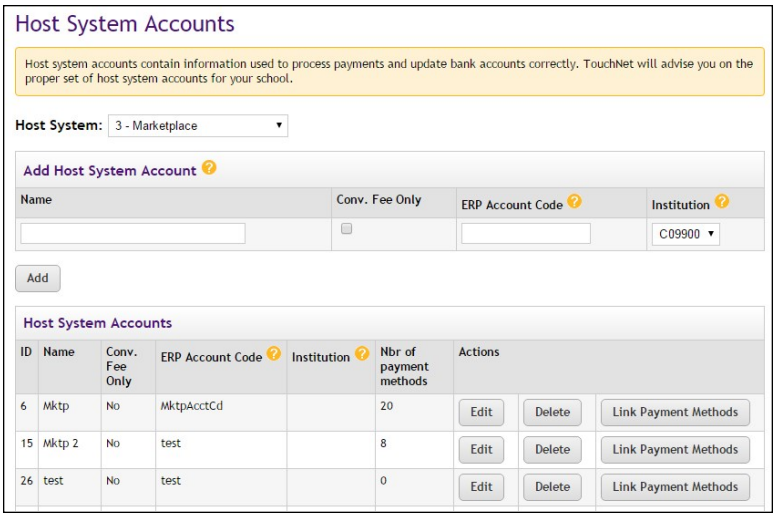


The Host Systems page in Payment Gateway.

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3 Identify the Host System that is used by Marketplace. This Host System is typically called "Marketplace" to distinguish it from the Host Systems used by other TouchNet U.Commerce applications.

4 For the Host System identified in Step 3, choose the corresponding View/Edit Accounts button in the Actions Column. The Host System Accounts page then appears.



The Host System Accounts page in Payment Gateway.

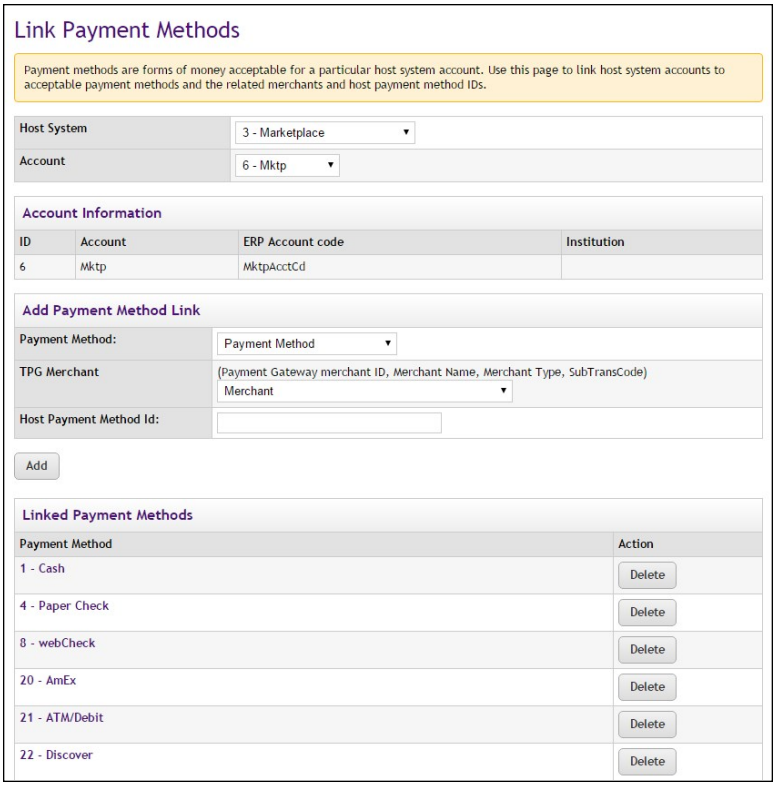
5 Identify the Host System Account that needs to be configured.

If you do not know which host system account(s) to choose, go to Marketplace and check the Merchant Settings page for the corresponding merchant. This page will identify the host system account used by that Marketplace merchant. All stores and uPay sites for this merchant will use the same host system account.

Note: Marketplace Point-of-Sale typically uses a host system account that has been configured for card-present transactions, while stores and uPay sites use a host system account for card-not-present transactions. If your school has licensed Marketplace Point-of-Sale, you must configure the payment methods for both host system accounts used by that merchant.

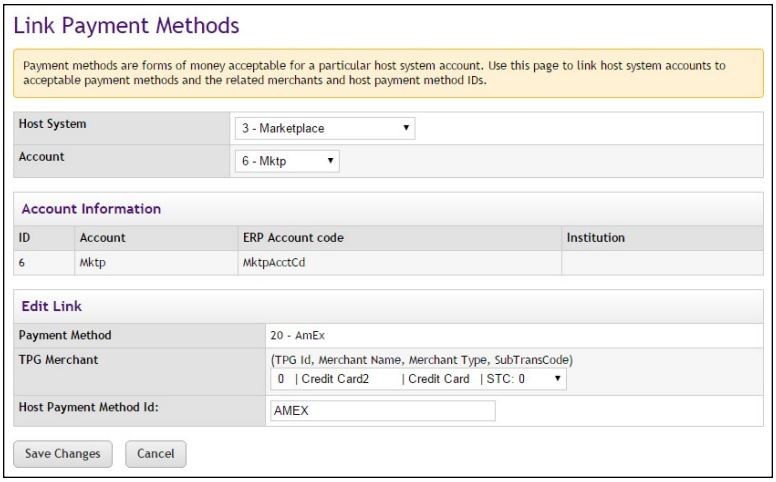
6 Select the Link Payment Methods button for the host system account that you identified in Step 5. The Link Payment Methods page then appears.

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The Link Payment Methods page in Payment Gateway.

7 For each payment method listed on the Link Payment Methods page, select the name of the payment method as displayed in the Payment Method column. The Link Payment Methods page is then refreshed with information for the selected payment method (which appears in the Edit Link section).



The Edit Link section shows the configuration settings for the selected payment method.

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8 Enter the Banner Detail Code for this payment method in the Host Payment Method ID field. If you don't know what value to enter, contact your Banner administrator for a list of the Detail Codes to be used with this Host System Account.

   The Detail Code that you enter is not validated by Payment Gateway, so you must make sure you enter a valid value.

9 Select the Save Changes button.

10 Repeat Steps 7 through 9 for each payment method listed on the Link Payment Methods page.

11 Return to Step 5 and identify any other host system accounts that need to be configured for Banner general ledger integration.

14.2 About Marketplace Accounting Codes

To establish general ledger integration between Marketplace and Banner, you must create accounting codes in Marketplace. These Marketplace accounting codes contain two pieces of information: a Banner Detail Code and a name for the accounting code. You can think of this Marketplace accounting code name as an alias for the Banner Detail 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 617**), 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 621**).

Common accounting codes are typically assigned to tax classes (see **"Tax Account Codes" on page 619**). 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 620**).

New accounting codes are established by merchant managers for the following reasons:

- To serve as the default accounting code used by a store (see **"Configuring Store Settings" on page 623**),
- To associate with tax codes (see **"Products, Shipping, and Tax" on page 624**),
- To serve as the accounting code used by one or more uPay sites (see **"Configuring uPay Settings" on page 627**),

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- To serve as an override accounting code used by one or more products or product modifiers in a store (see **"Products, Shipping, and Tax" on page 624**), and
- To serve as an override accounting code assigned to a delivery method in a shipping class (see **"Products, Shipping, and Tax" on page 624**).

Accounting code fields are only available in stores and uPay sites if general ledger reporting has been enabled.

Validation of Banner Detail Codes

As each Banner Detail Code is saved in Marketplace as part of an accounting code, it is validated with your Banner by Ellucian system. If you enter an invalid value, you will be prompted to change the value. So each detail code that you enter in Marketplace must be valid.

During the order fulfillment process for Marketplace stores, the Detail Code is passed to your Banner Finance System. Likewise, when uPay transactions are processed, the associated Detail Code is passed to your Banner Finance System.

Typically, Banner does not display this transaction information until the school runs a Banner process known as TGRFEED.

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 617**) 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 623**), 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.

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14.3 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.

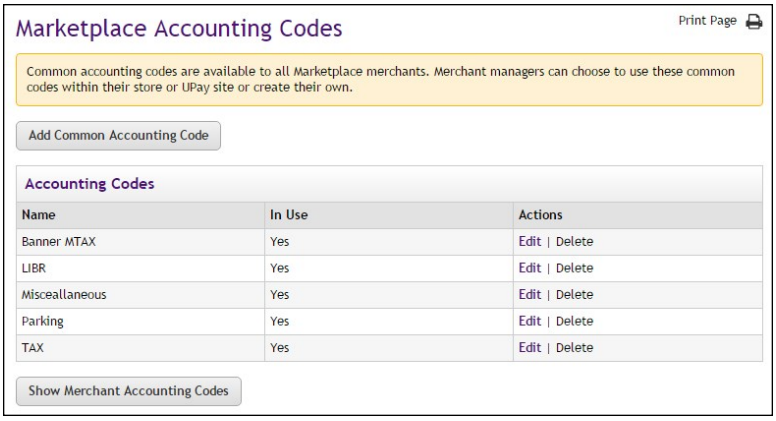
Configuration Setting for Banner: Adding Common Accounting Codes **Description**: Marketplace administrators can set up common accounting codes for use by Marketplace stores and uPay sites.
Left Navigation Menu: Marketplace Home > System Administration > Settings > Accounting Codes.
Page: Displays the Marketplace Accounting Codes page.

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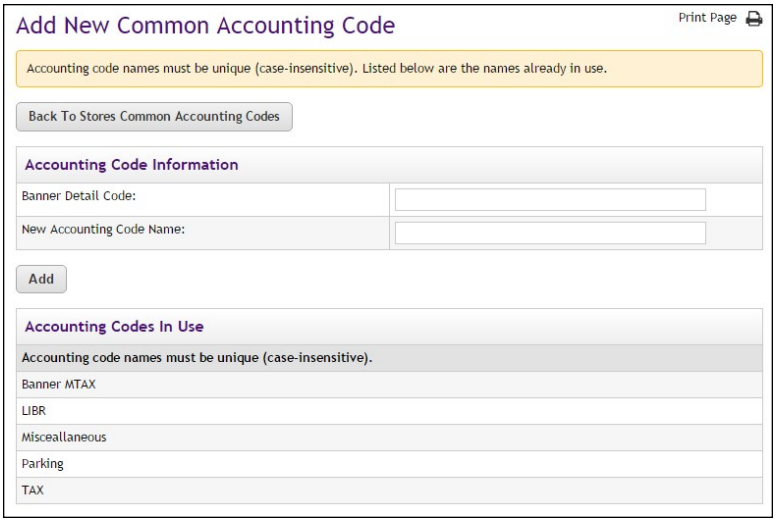
Configuration Setting for Banner: Adding Common Accounting Codes

Description: Marketplace administrators can set up common accounting codes for use by Marketplace stores and uPay sites.

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.



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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.

Configuration Setting for Banner: Enter a Default Cashier ID **Description**: Marketplace administrators can set up a default cashier ID available for all Marketplace stores.
Left Navigation Menu: Marketplace Home > System Administration > Settings > General.
Page: Displays the Marketplace General Settings page.
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. 

Tax Account Codes

In the system administration settings, a Marketplace administrator can also assign accounting codes to tax classes.

The following table describes 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.

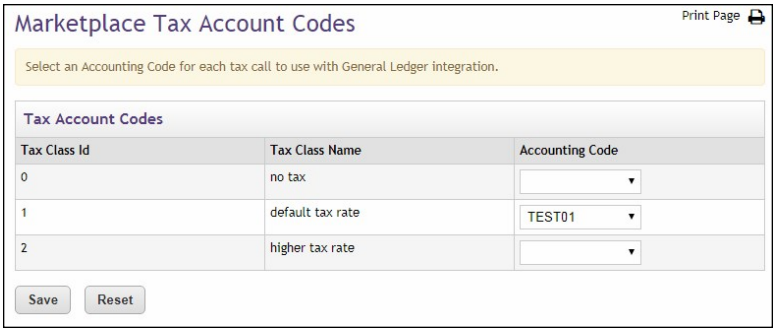
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Configuration Setting: Establishing Tax Account Codes

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.



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 265**.

14.4 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.

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Configuration Setting: Enabling Common Accounting Codes

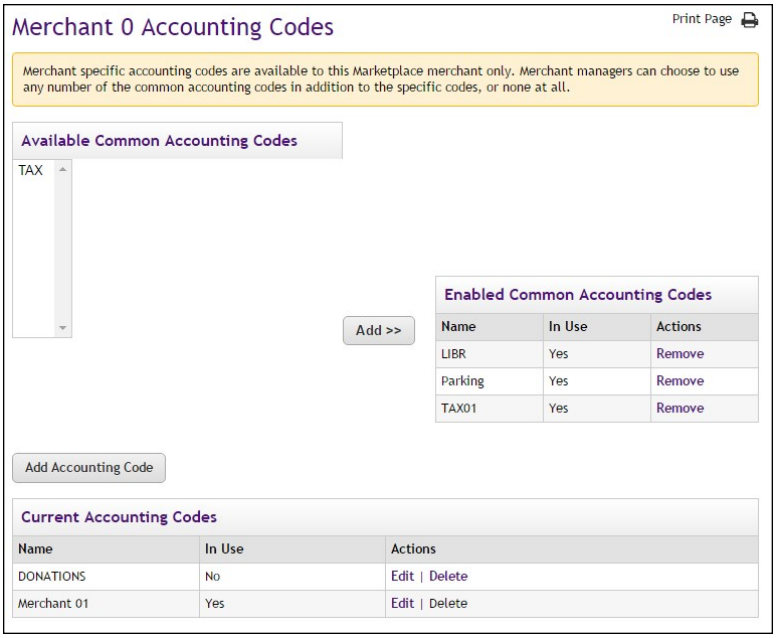
Description: A Marketplace merchant manager can select which common accounting codes are available for use by the merchant's stores and uPay sites.

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.

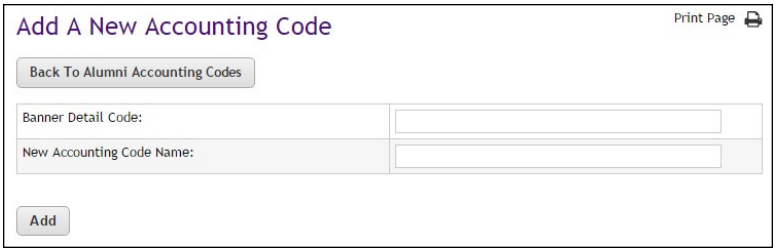


Merchant Accounting Codes

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.

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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.
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 Codes" 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.

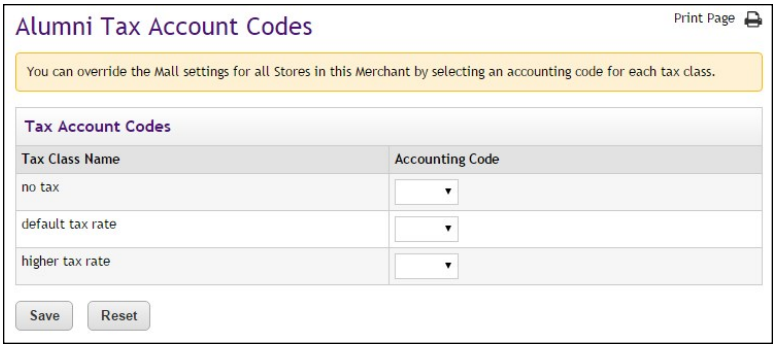
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Configuration Setting: Establishing Tax Account Codes

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.



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.

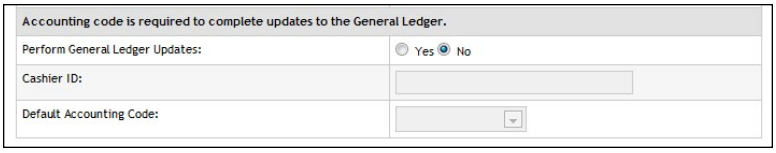
Note: Stores that use the Marketplace tax service never use the "higher tax rate": The tax service only uses the "no tax" and "default tax rate" tax classes. The higher tax rate is only available with campus-maintained tax rate files. For more about the Marketplace tax service, see **"Taxes" on page 265**.

14.5 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.

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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, enter a Cashier ID in the Cashier ID field. The value you enter in this field overrides the Cashier ID that was entered at the administrative level on the Marketplace General Settings page. 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. 

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.

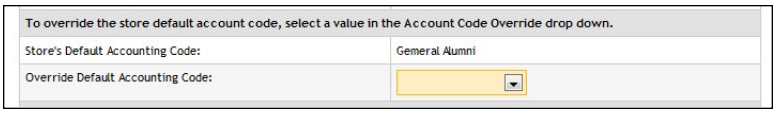
Configuration Setting: Selecting an Accounting Code Override for a Product **Description**: A Marketplace store manager can assign an accounting code override to a product.
Left Navigation Menu: Marketplace Home > [Merchant] > Stores > [Store Name] > Store Settings >Products.
Page: Displays the [Store Name] Products page.

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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 accounting code. Override accounting codes can also be assigned to product modifiers.

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 291**.

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.

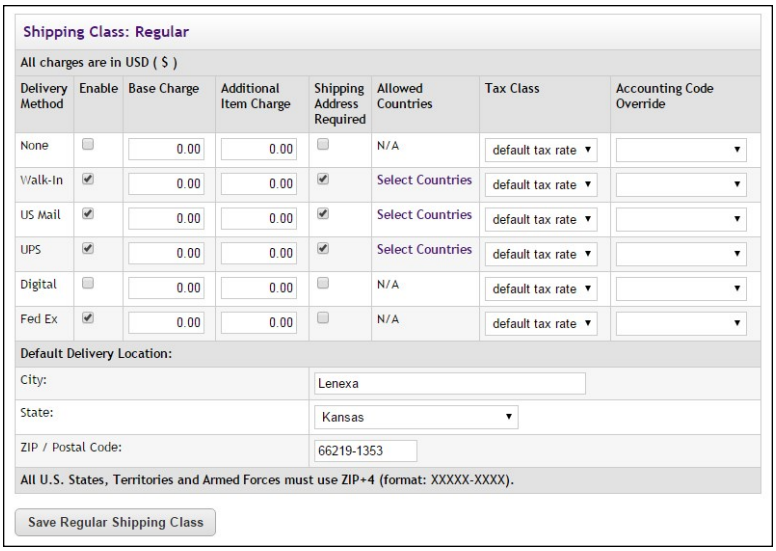
Page: Displays the [Store Name] Shipping Classes page.

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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.



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.

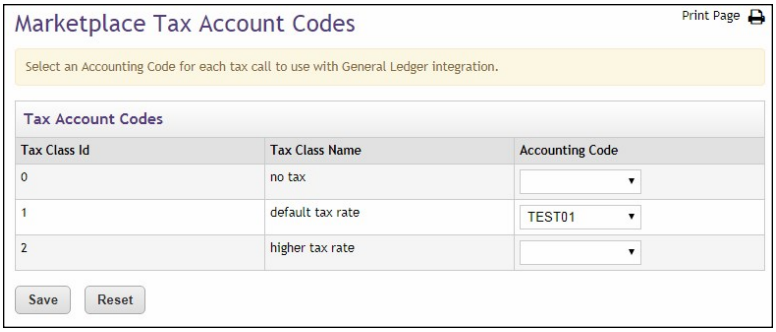
Page: Displays the [Store Name] Tax Account Codes page.

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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.



You can assign an accounting code to each tax class by choosing from the Accounting Code dropdown menus.

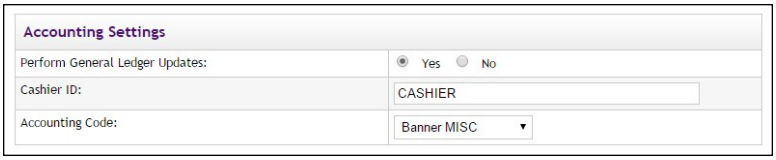
If no accounting codes are assigned to the tax classes, then the store reports tax revenue using the accounting codes configured at the merchant level.

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 265**.

14.6 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.

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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.
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 526**.

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.

14.7 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

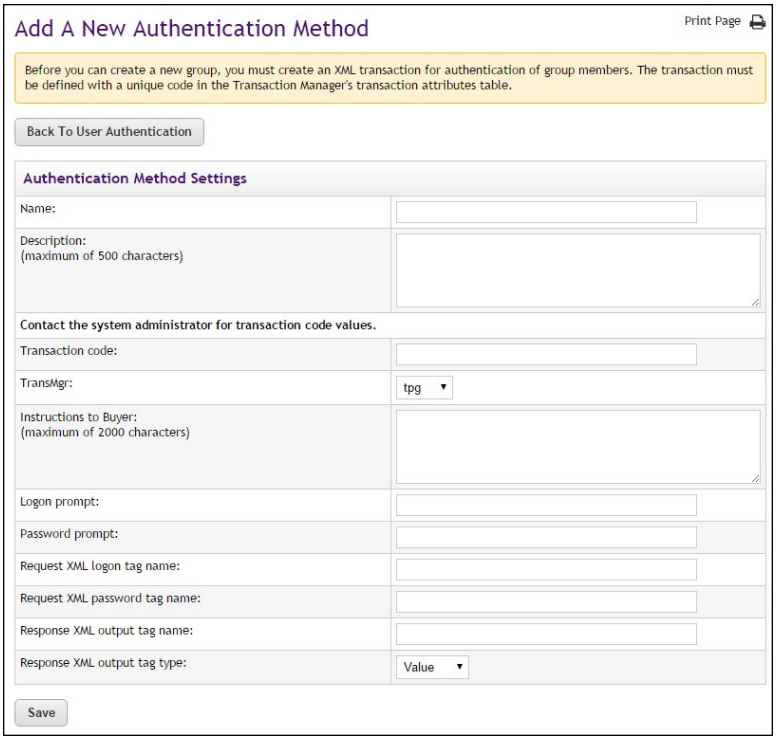
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stores, in which only users identified by your Banner by Ellucian system can view specified stores or make purchases from these stores. If your institution does not want to use authentication for Banner by Ellucian, you do not need to perform the steps 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.



3. Complete the fields as described below in "Field Definitions," and then click the Save button.

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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".)

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14.8 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.

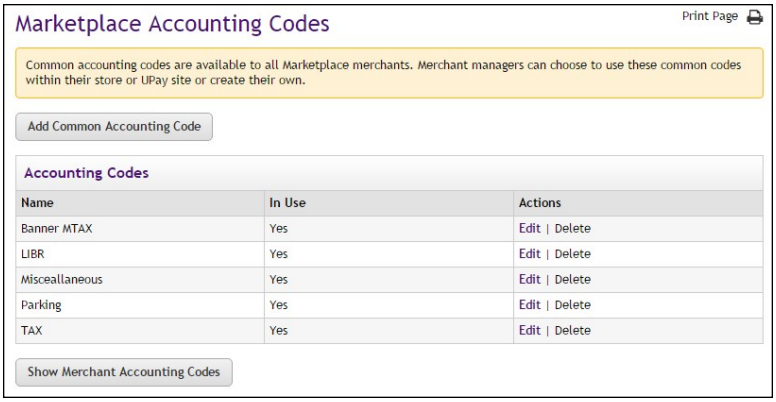
Configuration Setting to Maintain: Common Accounting Codes **Description**: Marketplace administrators can edit and delete common accounting codes.
Left Navigation Menu: Marketplace Home > System Administration > Settings > Accounting Codes.
Page: Displays the Marketplace Accounting Codes page.

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Configuration Setting to Maintain: Common Accounting Codes

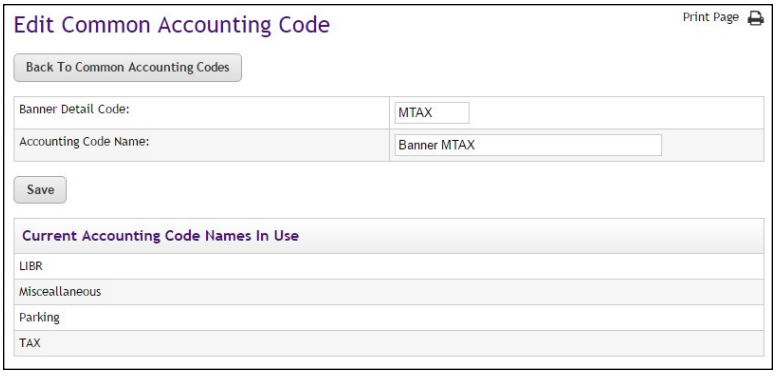
Description: Marketplace administrators can edit and delete common accounting codes.

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.



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).



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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.

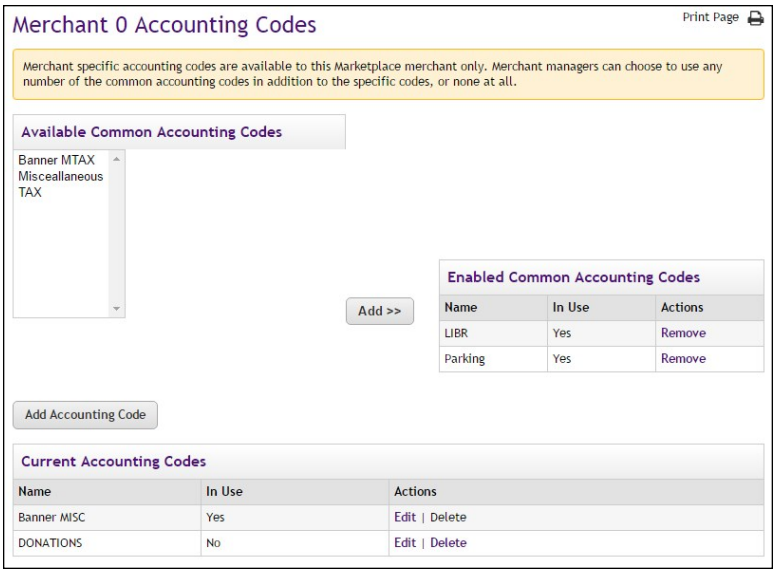
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Configuration Setting to Maintain: Merchant Accounting Codes

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).

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Configuration Setting to Maintain: Merchant Accounting Codes

Description: Merchant managers can enable existing common accounting codes and edit merchant-specific accounting codes.



14.9 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.

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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 628**.

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 payment 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 419**.

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.

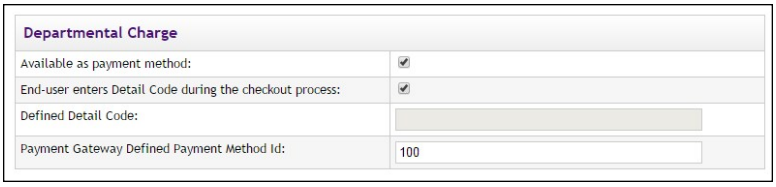
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Configuration Setting: Turning on departmental charge

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.



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*).

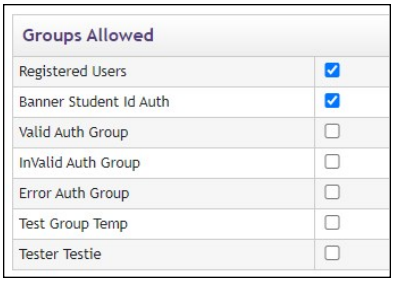
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Configuring Store Settings

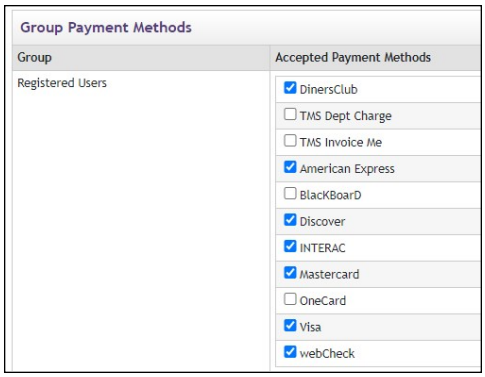
The only store-level settings for departmental charge involve user groups. It is advisable to use user groups with departmental charge. By using user groups, you can determine if the buyers are authorized to use the departmental charge payment method.

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 628**.

In addition, you may consider using departmental charges with private stores. Private stores are only available to users in specific user groups.

Configuration Setting: Authorized 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 > Authorized Groups.
Page: Displays the Authorized Groups page.
Actions: The authorized groups 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 the user groups that have been created. In the Groups Allowed section of the page, select the checkboxes for each user group that should be allowed to make purchases from the store.      By selecting user groups on this page, these user groups then appear on the Payment Methods page–which is where you will determine which payment methods (including departmental charge) are allowed for each user group.

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Configuration Setting: 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 > Payment Methods.
Page: Displays the Payment Methods page.
Actions: After using the Authorized Groups 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 page in the Group Payment Methods section. Here, you simply select which payment methods to use with each user group. 

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.

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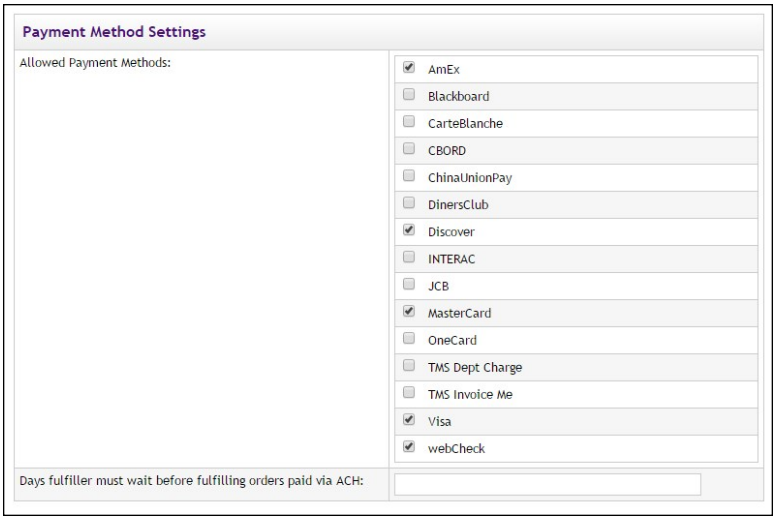
Configuration Setting: Allowed Payment Methods (Product Details)

Description: Marketplace store managers or store clerks can specify which payment methods are allowable for each product.

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 638**. For example, you can specify that the user group of Everybody can use payment 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 638**.)

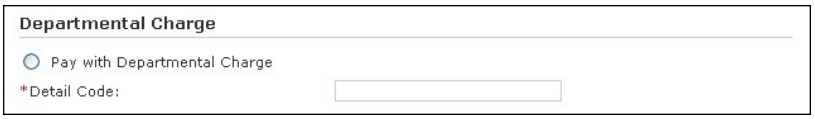
When a customer selects Departmental Charge as the payment method, the response by the checkout process depends upon the selection that the

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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.

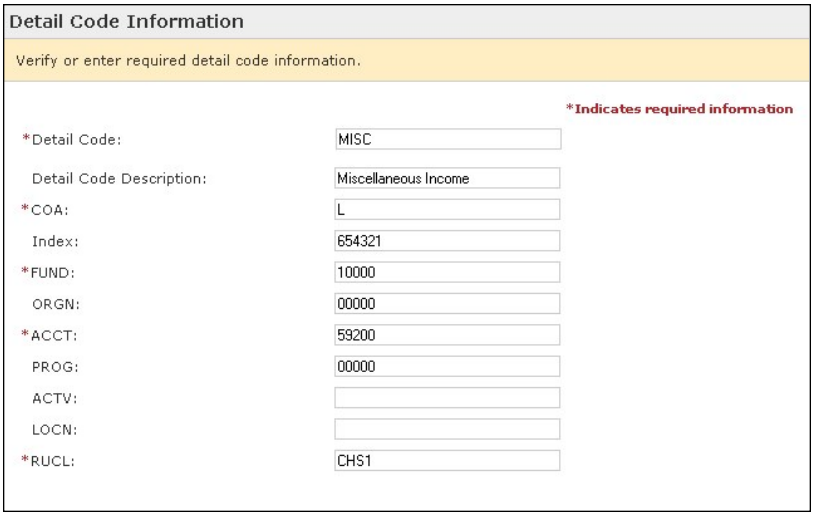


The Departmental Charge option appears on the Payment Method page of the uStores checkout process.

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:

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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.

14.10 What to Expect in Banner

Once configuration for Banner has been completed, including turning on general ledger updates for one or more stores, then various parameters and values are passed during the order fulfillment process for Marketplace stores. Likewise, when uPay transactions are processed, then various parameters and values are also passed.

Typically, the Banner Finance System does not display this transaction information until the school runs a Banner process known as TGRFEED.

The following sections describe what Marketplace sends and what schools can expect to see in Banner.

What Marketplace Sends ...

When a transaction is completed in Marketplace, the following information is sent to the school's Banner system:

- **Application**—The value "TN_MARKETPLACE" is typically passed.

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- **First Name** and **Last Name**—These values are passed separately, but Banner typically combines these values into a single Name field.
- **Street Address**—As applicable, Marketplace sends separately both line 1 and line 2 street address information.
- **City, State, Postal Code**—These values are passed separately.
- **Country**—Marketplace sends a country name, which Banner typically converts into a country code.
- **Payment Reference Number**—This value is assigned by Payment Gateway.
- **Merchant ID**—This value is the subtranscode for the Payment Gateway merchant that is associated with the payment method used by the customer.
- **Cashier ID**—This value is configured in Marketplace. Each store and each uPay site can be configured with its own Cashier ID value. These values can be unique so that each store or uPay site can be easily identified.
- **Tax Amount**, **Shipment Tax Amount**, **Shipping Cost Amount**, and **Fulfilled Item Amount**—Marketplace records these amounts separately. For each separate amount value, Banner receives a complete set of transaction data.
- **Credit Account Detail Code**—This value is configured in Marketplace as part of an accounting code. A store, uPay site, product, item tax, shipment tax, or shipping cost can have its own accounting code (and thus its own Banner Detail Code).
- **Debit Account Detail Code**—This value is configured in Payment Gateway as the Host Payment Method ID. Each Host System Account has its own linked payment methods, and each payment method has its own Host Payment Method ID.

Which Tables in Banner Receive Marketplace Data ...

During the general ledger update process, data from Marketplace is stored in Banner's TBBMISC table and the TBRMISD table.

The following table describes which Banner tables are used for storing each type of transaction data:

Transaction Data	TBBMISC	TBRMISD
Application	x	x
Name	x	
Street Address (line 1)	x	

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Street Address (line 2)	x	
City	x	
State (or Province)	x	
Postal Code	x	
Country	x	
Payment Reference Number		x
Merchant ID		x
Cashier ID	x	x
Amount		x
Credit Account Detail Code		x
Debit Account Detail Code		x

Where to Find This Info in Banner ...

The following table describes where transaction data can be found in Banner by Ellucian:

This Transaction Data from Marketplace ...	Can be found on this page in Banner ...	In this field ...
Application	TFAMISC	Create Source
Name	TFAMISC	Name
Street Address (line 1)	TFAMISC	Street Line 1
Street Address (line 2)	TFAMISC	Street Line 2
City	TFAMISC	Ciy
State (or Province)	TFAMISC	State or Province
Postal Code	TFAMISC	Zip or Postal Code
Country	TFAMISC	Nation
Payment Reference Number	TFAMISC	Payment Number
Merchant ID	TFAMISC	Merchant ID

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This Transaction Data from Marketplace ...	Can be found on this page in Banner ...	In this field ...
Cashier ID	TFAMISC	User
	TGACREV	Session User
Amount	TFAMISC	Amount
Credit Account Detail Code	TFAMISC	Detail Code (lower section)
Debit Account Detail Code	TFAMISC	Detail Code (upper section)
	TGACREV	Detail

Note: The table above represents a conventional installation of Banner by Ellucian. If your installation of Banner by Ellucian has been customized, you may find this information on different pages (or the field names may be different).

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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 values 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 values and GL Distribution Codes are communicated to Colleague for use in its general ledger module.

The configuration steps for establishing general ledger integration between Colleague by Ellucian and Marketplace (as well as configuration steps in Payment Gateway) are described in the following sections.

Steps for Colleague Setup

The following steps summarize how to establish general ledger integration for Colleague by Ellucian.

1. A Payment Gateway administrator configures the linked payment methods for the Host System Account. See **"Configuring Payment Methods in Payment Gateway" on page 648**.
2. A Marketplace administrator creates common accounting codes. See **"Configuring System Administration Settings" on page 653**.
3. A Marketplace administrator assigns a common accounting code to each tax class. See **"Tax Account Codes" on page 655**.
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 656**
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 and product modifiers, 4) override accounting codes for delivery methods, and 5) accounting codes for tax classes. See **"Merchant Accounting Settings" on page 657**.
6. For each Marketplace merchant, a merchant manager can assign an accounting code to each tax class. See **"Tax Account Codes" on page 657**
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 GL Distribution Code. See **"Configuring Store Settings" on page 658**.

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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 660**.

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 GL Distribution Code. See **"Configuring uPay Settings" on page 662**.

15.1 Configuring Payment Methods in Payment Gateway

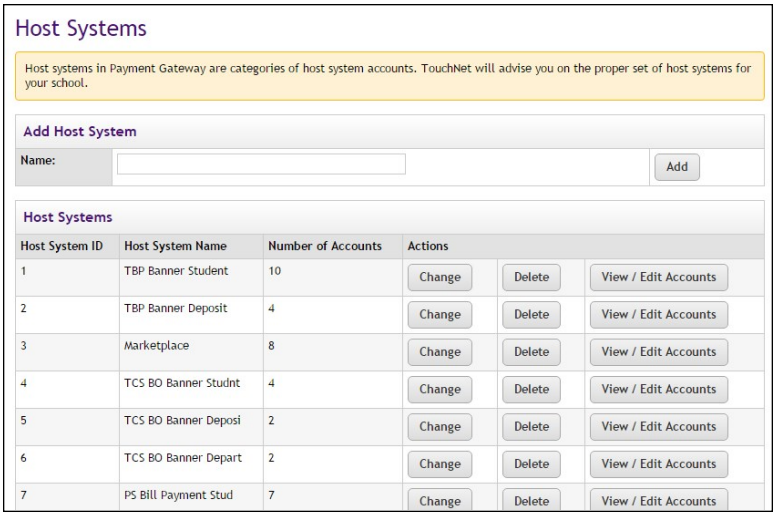
Before you configure Marketplace for general ledger integration, you should start with the debit side of the transaction as represented by the available payment methods that will be offered by a Marketplace merchant. In Payment Gateway, you must configure each payment method with a Colleague Pay Method code. (The GL Distribution Code, which is configured in Marketplace, is also part of the debit side of double-entry general ledger reporting.)

Steps for Payment Method Configuration

To configure Payment Gateway with Colleague codes for each payment method, follow these steps:

1 Launch Payment Gateway.

2 Navigate to Commerce Configuration > Host Systems. The Host Systems page then appears.

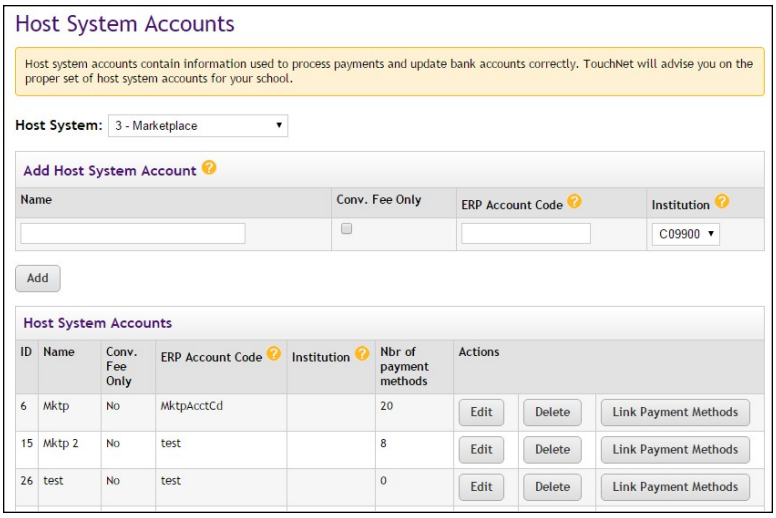


The Host Systems page in Payment Gateway.

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3 Identify the Host System that is used by Marketplace. This Host System is typically called "Marketplace" to distinguish it from the Host Systems used by other TouchNet U.Commerce applications.

4 For the Host System identified in Step 3, choose the corresponding View/Edit Accounts button in the Actions Column. The Host System Accounts page then appears.



The Host System Accounts page in Payment Gateway.

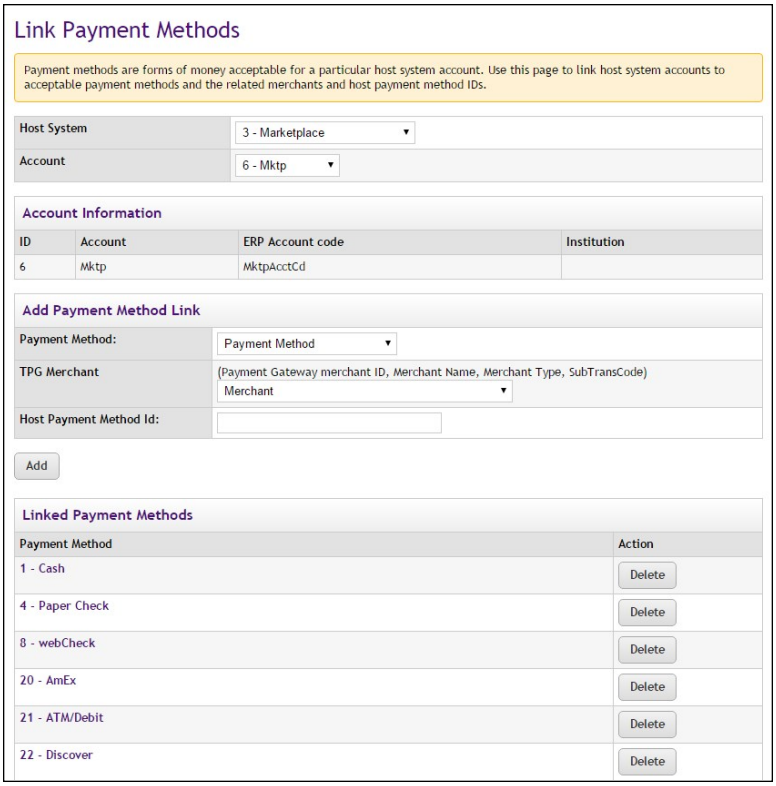
5 Identify the Host System Account that needs to be configured.

If you do not know which host system account(s) to choose, go to Marketplace and check the Merchant Settings page for the corresponding merchant. This page will identify the host system account used by that Marketplace merchant. All stores and uPay sites for this merchant will use the same host system account.

Note: Marketplace Point-of-Sale typically uses a host system account that has been configured for card-present transactions, while stores and uPay sites use a host system account for card-not-present transactions. If your school has licensed Marketplace Point-of-Sale, you must configure the payment methods for both host system accounts used by that merchant.

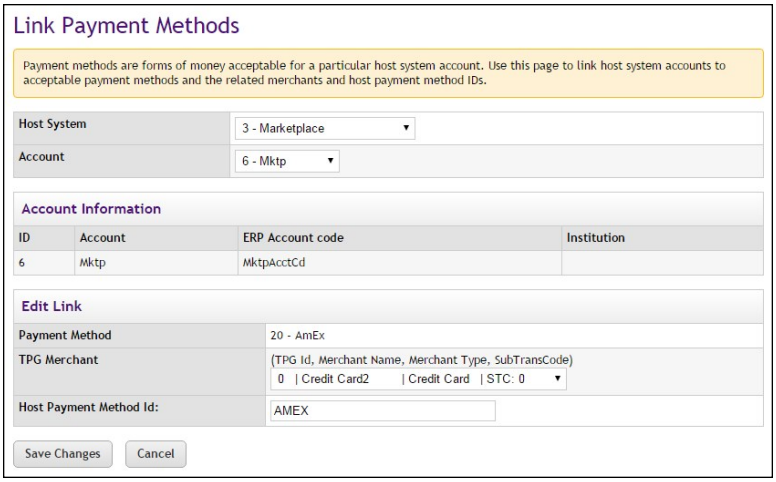
6 Select the Link Payment Methods button for the host system account that you identified in Step 5. The Link Payment Methods page then appears.

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The Link Payment Methods page in Payment Gateway.

7 For each payment method listed on the Link Payment Methods page, select the name of the payment method as displayed in the Payment Method column. The Link Payment Methods page is then refreshed with information for the selected payment method (which appears in the Edit Link section).



The Edit Link section shows the configuration settings for the selected payment method.

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8 Enter the Colleague Pay Method code for this payment method in the Host Payment Method ID field. If you don't know what value to enter, contact your Colleague administrator for a list of the Colleague codes to be used with this Host System Account.

   The Colleague code that you enter is not validated by Payment Gateway, so you must make sure you enter a valid value.

9 Select the Save Changes button.

10 Repeat Steps 7 through 9 for each payment method listed on the Link Payment Methods page.

11 Return to Step 5 and identify any other host system accounts that need to be configured for Colleague general ledger integration.

15.2 About Marketplace Accounting Codes

To establish general ledger integration between Marketplace and Colleague, you must create accounting codes in Marketplace. These Marketplace accounting codes contain just one piece of information: a Colleague account number (or a Colleague NARD Shortcut 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 653**), 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 657**).

Common accounting codes are typically assigned to tax classes (see **"Tax Account Codes" on page 655**). 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 656**).

New accounting codes are established by merchant managers for the following reasons:

- To serve as the default accounting code used by a store (see **"Configuring Store Settings" on page 658**),
- To associate with tax codes (see **"Products, Shipping, and Tax" on page 660**),
- To serve as the accounting code used by one or more uPay sites (see **"Configuring uPay Settings" on page 662**),

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- To serve as an override accounting code used by one or more products (or product modifiers) in a store (see **"Products, Shipping, and Tax" on page 660**), and
- To serve as an override accounting code assigned to a delivery method in a shipping class (see **"Products, Shipping, and Tax" on page 660**).

Accounting code fields are only available in stores and uPay sites if general ledger reporting has been enabled.

Validation of Colleague Codes

As each Colleague code is saved in Marketplace, it is validated with your Colleague by Ellucian system. If you enter an invalid value, you will be prompted to change the value. So each Colleague code that you enter in Marketplace must be valid.

During the order fulfillment process for Marketplace stores, the Colleague code is passed to your Colleague by Ellucian system. Likewise, when uPay transactions are processed, the associated Colleague code is passed to your Colleague by Ellucian system.

Note: The Colleague code that is assigned as a Marketplace accounting code represents the credit side of double-entry general ledger reporting.

Important! Before a Marketplace accounting code can be established you must ensure a corresponding Colleague code has been created. Contact your Colleague administrator for a list of the approved Colleague codes. Likewise, contact the Colleague by Ellucian administrator if a new Colleague code is required.

About Colleague Shortcuts

Whenever this guide mentions Colleague codes, it also means Colleague NARD Shortcuts. A Colleague Shortcut can represent a group of Colleague account numbers with percentages assigned to each Colleague account number in the group so that transactions are split into multiple Colleague account numbers according to a prescribed allocation plan. Transactions can be split among multiple Colleague account numbers or 100% can be assigned to a single Colleague account number.

Note: Colleague NARD Shortcuts are entered on the NARD screen of the Colleague system and thus they are typically referred to as NARDs.

As each Colleague account number 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 account numbers and the distribution percentages. This information is then stored in Marketplace for all subsequent related transactions.

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Important! TouchNet recommends using Colleague Shortcuts whenever possible, rather than using individual Colleague account numbers. 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 uses GL 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. (The Host Payment Method ID also represents the debit account. See **"Configuring Payment Methods in Payment Gateway" on page 648**.)

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.

15.3 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 account number of NARD shortcut code as a Marketplace "common accounting code."

The following table describes how to create a common accounting code.

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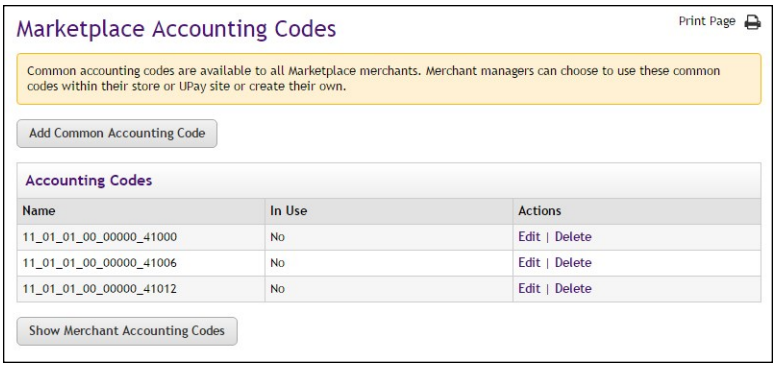
Configuration Setting for Colleague by Ellucian: Adding Common Accounting Codes

Description: Marketplace administrators can set up common accounting codes for use by Marketplace stores and uPay sites.

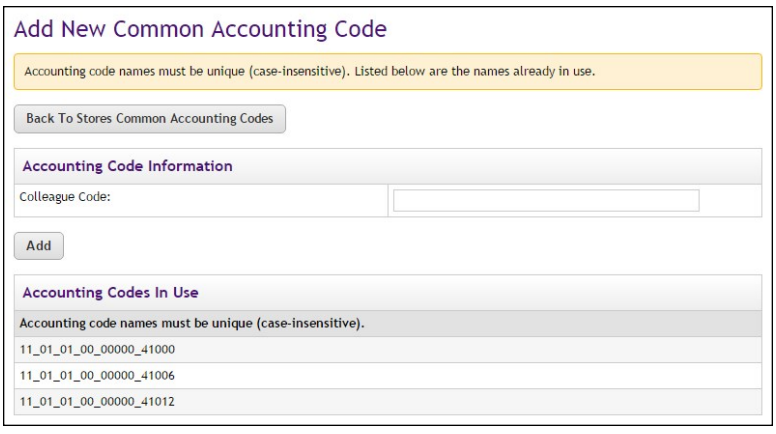
Left Navigation Menu: Marketplace Home > System Administration > Settings > Accounting Codes.

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.



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 value 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.



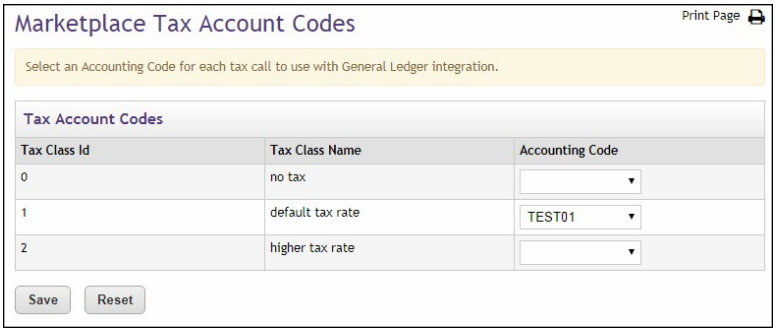
Note: TouchNet recommends using Colleague NARD Shortcuts whenever possible, rather than using individual Colleague account numbers. When you use Colleague Shortcuts, the description shows up in the Cash Receipts and GL Posting Reports for Colleague.

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Tax Account Codes

In the system administration settings, a Marketplace administrator can also assign accounting codes to tax classes.

The following table describes those system administration settings which affect tax account codes.

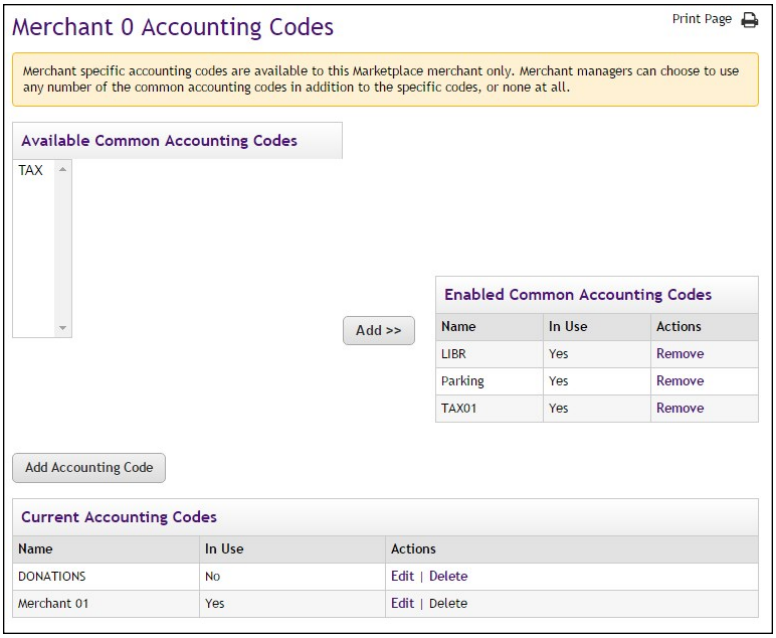
Configuration Setting: Establishing Tax Account Codes **Description:** Marketplace administrators can link accounting codes to tax classes, and these tax classes can be used for all Marketplace stores.
Left Navigation Menu: Marketplace Home > System Administration > Settings > Tax Account Codes.
Page: 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.  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 265**.

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15.4 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.

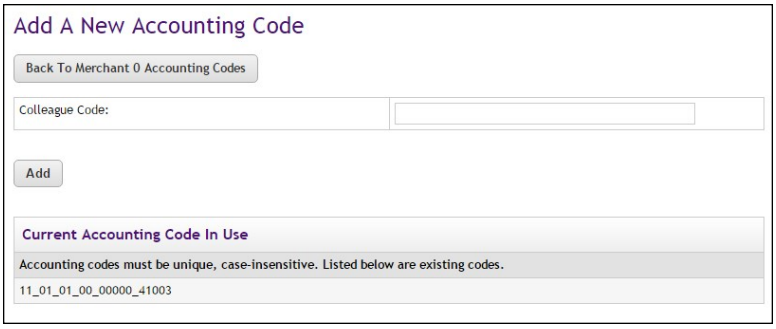


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Merchant Accounting Settings

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.

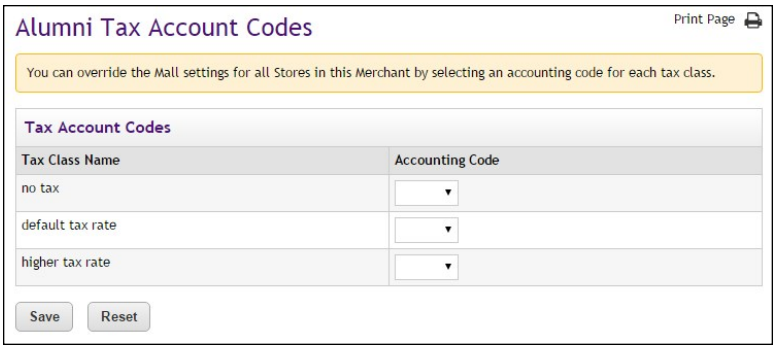
Configuration Setting for Colleague by Ellucian: Add New Accounting codes **Description**: A Marketplace manager can add new accounting codes to be used by the merchant's stores and uPay sites.
Left Navigation Menu: Marketplace Home > [merchant] > Accounting Codes.
Page: Displays the [Merchant] Accounting 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.

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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.    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 265**.

15.5 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.

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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.

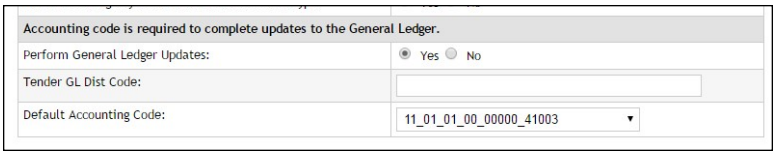
Left Navigation Menu: Marketplace Home > [Merchant] > Stores > [Store Name] > Store Settings > General.

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.

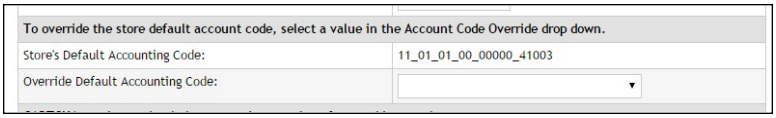
In addition, you must also select an accounting code from the Default Accounting Code dropdown menu. The accounting code you select will be used for all products in a store except those products for which you establish an override accounting code. The accounting codes displayed in the dropdown menu represent both the common accounting codes that have been enabled and the new accounting codes established by a merchant manager.



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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.      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 accounting code. Override accounting codes can also be used with product modifiers. **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 291**.

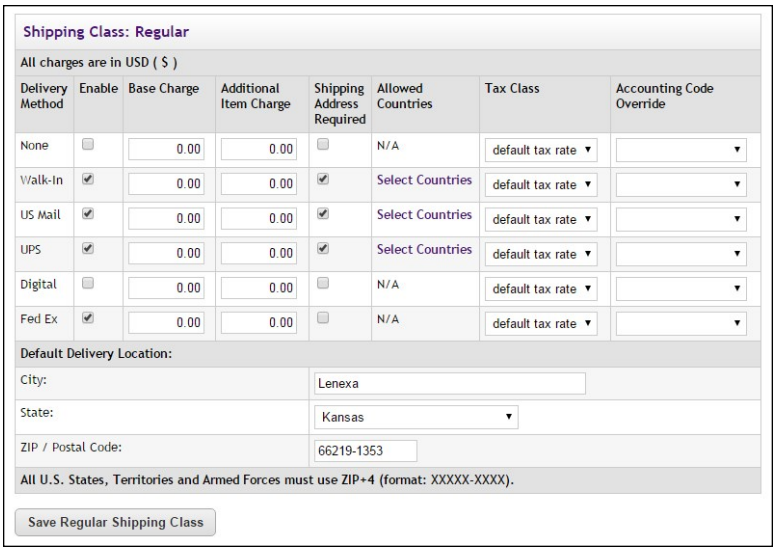
Configuration Setting: Selecting an Accounting Code Override for a Delivery Method **Description**: A Marketplace store manager can associate an accounting code with a delivery method in a shipping class.
Left Navigation Menu: Marketplace Home > [Merchant] > Stores > [Store Name] > Store Settings > Shipping Classes.
Page: Displays the [Store Name] Shipping Classes page.

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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.



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.

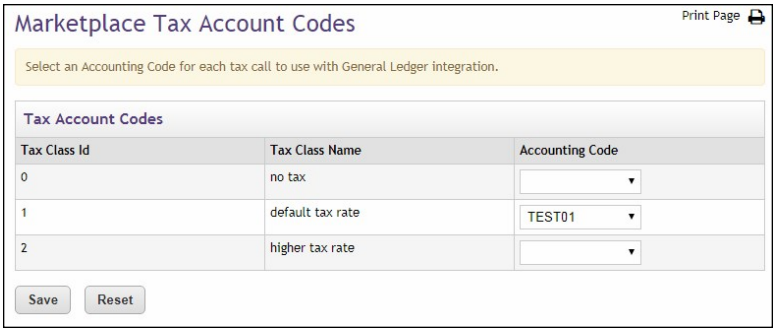
Page: Displays the [Store Name] Tax Account Codes page.

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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.



You can assign an accounting code to each tax class by choosing from the Accounting Code dropdown menus.

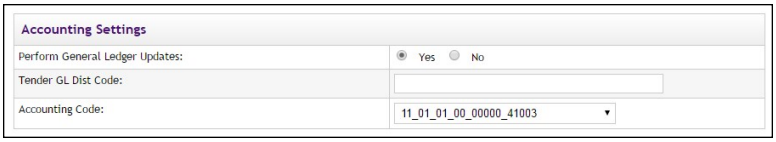
If no accounting codes are assigned to the tax classes, then the store reports tax revenue using the accounting codes configured for taxes at the merchant level.

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 265**.

15.6 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.

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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.
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.   

15.7 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.

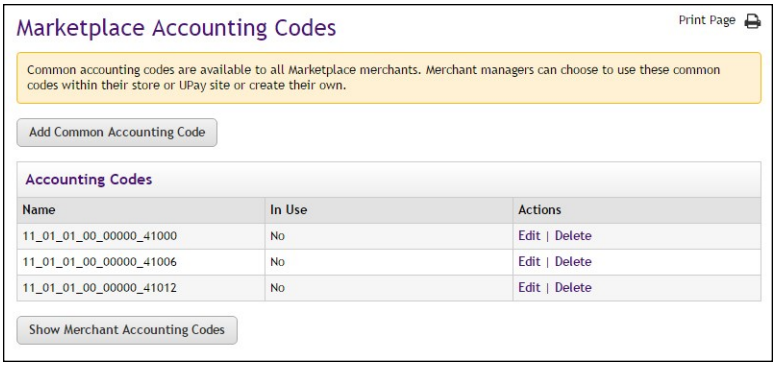
Configuration Setting to Maintain: Common Accounting Codes **Description**: Marketplace administrators can edit and delete common accounting codes.
Left Navigation Menu: Marketplace Home > System Administration > Settings > Accounting Codes.
Page: Displays the Marketplace Accounting Codes page.

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Configuration Setting to Maintain: Common Accounting Codes

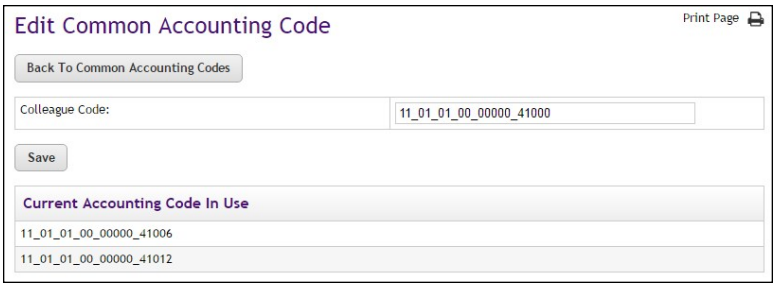
Description: Marketplace administrators can edit and delete common accounting codes.

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.



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.



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.

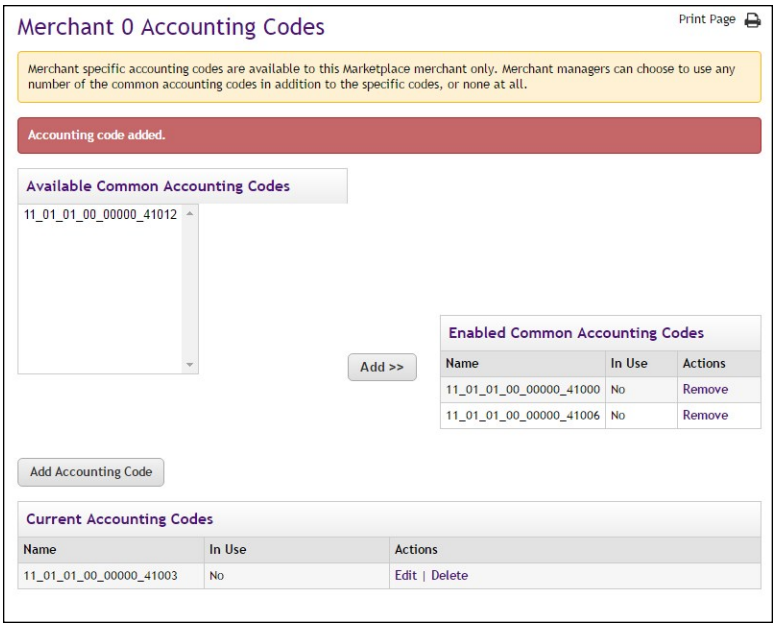
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Configuration Setting to Maintain: Merchant Accounting Codes

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.



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.

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Configuration Setting to Maintain: Merchant Accounting Codes

Description: Merchant managers can enable existing common accounting codes and edit merchant-specific accounting codes.



15.8 What to Expect in Colleague

Once configuration for Colleague has been completed, including turning on general ledger updates for one or more stores (or uPay sites), then various parameters and values are passed to the school's Colleague system when each store order is fulfilled and when each uPay site transaction is processed.

The following sections describe what Marketplace sends and what schools can expect to see in Colleague.

What Marketplace Sends ...

When a transaction is completed in Marketplace, the following information is sent to the school's Colleague system:

- **DIST Code**—This values comes from the Tender GL Dist Code field on the Store General Settings page or the uPay Payment Settings page.
- **Amount**—For each transaction, Marketplace sends separate amounts for each fulfilled item amount, tax amount, shipment cost amount, and shipping tax amount. For each separate amount value, Colleague receives a complete set of transaction data.
- **Transaction ID**—This value is the Marketplace order ID for store transactions or the system tracking ID for uPay transactions.
- **Colleague Account Number**—If a Colleague NARD Shortcut was used for the Marketplace accounting code, then each related Colleague account number is sent with an amount that corresponds to the allocation as configured according the Colleague Shortcut.

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- **Pay Method Code**—This value is configured in Payment Gateway as the Host Payment Method ID. Each Host System Account has its own linked payment methods, and each payment method has its own Host Payment Method ID.

Where to Find This Info in Colleague ...

Store transactions are sent to Colleague after fulfillment. uPay transactions are sent immediately after the transactions are processed by uPay.

The following table describes where to find the transaction data in Colleague:

This Transaction Data from Marketplace ...	Can be found on this page in Colleague ...	In this field ...
Dist Code	Cash Receipts Inquiry screen (CRIN)	Distribution
Amount	CRIN	Amount
Transaction ID	CRIN	Payer ID/Name field
Colleague NARD Shortcut	CRIN	Non AR Receipt Code
Pay Method Code	CRIN	Pay Method

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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.

In addition, PeopleSoft SpeedType codes and business unit codes must be associated in Payment Gateway with each linked payment method.

When transactions take place in Marketplace, PeopleSoft SpeedType codes and business unit codes are thus communicated to PeopleSoft for use in its general ledger module.

The configuration steps for establishing general ledger integration between PeopleSoft and Marketplace (as well as configuration steps in Payment Gateway) are described in the following sections.

Steps for PeopleSoft Setup

The following steps summarize how to use the Marketplace Operations Center to establish general ledger integration for PeopleSoft.

1. A Payment Gateway administrator configures the linked payment methods for the Host System Account. See **"Configuring Payment Methods in Payment Gateway" on page 670**.
2. A Marketplace administrator creates common accounting codes. See **"Configuring System Administration Settings" on page 674**.
3. A Marketplace administrator assigns a common accounting code to each tax class. See **"Tax Account Codes" on page 677**.
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 678**
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 and product modifiers, 4) override accounting codes for delivery methods, and 5) accounting codes for tax classes. See **"Merchant Accounting Codes" on page 679**.
6. For each Marketplace merchant, a merchant manager can assign an accounting code to each tax class. See **"Tax Account Codes" on page 679**

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7 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 680**.

8 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 682**.

9 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 684**.

16.1 Configuring Payment Methods in Payment Gateway

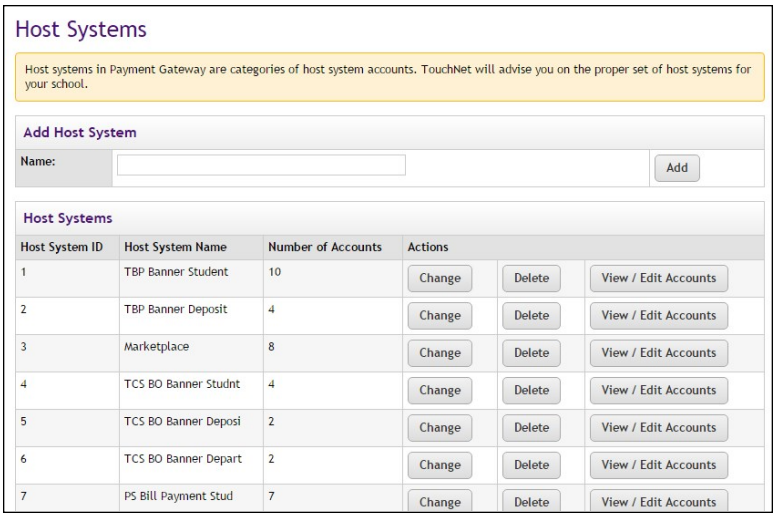
Before you configure Marketplace for general ledger integration, you should start with the debit side of the transaction as represented by the available payment methods that will be offered by a Marketplace merchant. In Payment Gateway, you must configure each payment method with a PeopleSoft Business Unit and SpeedType.

Steps for Payment Method Configuration

To configure Payment Gateway for PeopleSoft general ledger integration, follow these steps:

1 Launch Payment Gateway.

2 Navigate to Commerce Configuration > Host Systems. The Host Systems page then appears.

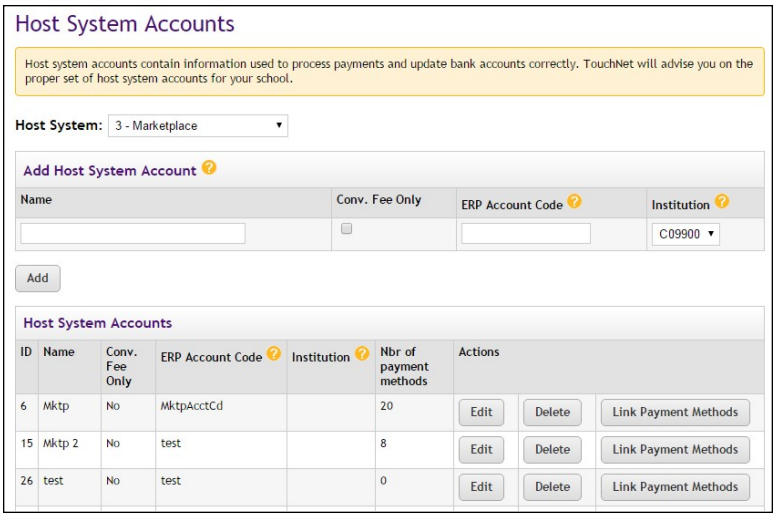


The Host Systems page in Payment Gateway.

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3 Identify the Host System that is used by Marketplace. This Host System is typically called "Marketplace" to distinguish it from the Host Systems used by other TouchNet U.Commerce applications.

4 For the Host System identified in Step 3, choose the corresponding View/Edit Accounts button in the Actions Column. The Host System Accounts page then appears.



The Host System Accounts page in Payment Gateway.

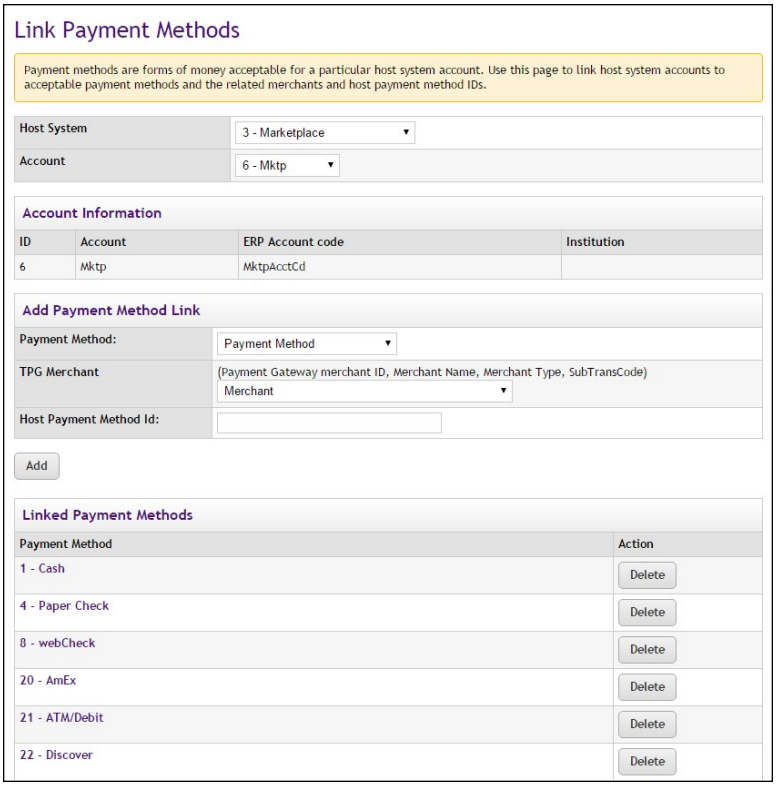
5 Identify the Host System Account that needs to be configured.

If you do not know which host system account(s) to choose, go to Marketplace and check the Merchant Settings page for the corresponding merchant. This page will identify the host system account used by that Marketplace merchant. All stores and uPay sites for this merchant will use the same host system account.

Note: Marketplace Point-of-Sale typically uses a host system account that has been configured for card-present transactions, while stores and uPay sites use a host system account for card-not-present transactions. If your school has licensed Marketplace Point-of-Sale, you must configure the payment methods for both host system accounts used by that merchant.

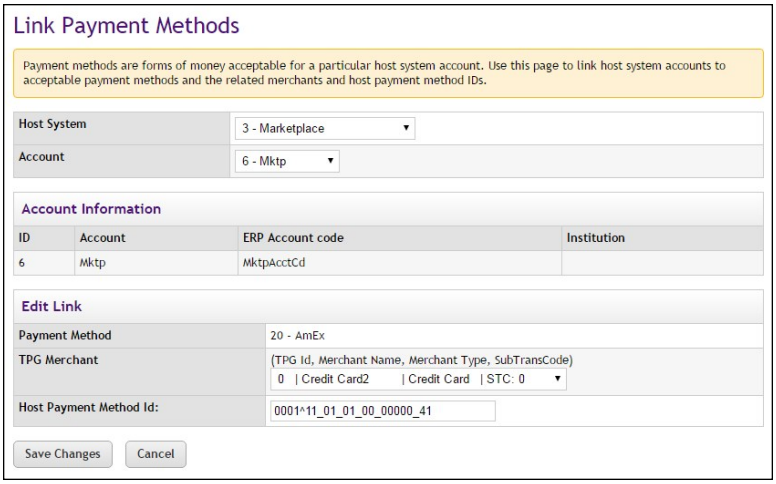
6 Select the Link Payment Methods button for the host system account that you identified in Step 5. The Link Payment Methods page then appears.

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The Link Payment Methods page in Payment Gateway.

7 For each payment method listed on the Link Payment Methods page, select the name of the payment method as displayed in the Payment Method column. The Link Payment Methods page is then refreshed with information for the selected payment method (which appears in the Edit Link section).



The Edit Link section shows the configuration settings for the selected payment method.

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8 In the Host Payment Method ID field, you must enter a combination of the applicable PeopleSoft Business Unit and SpeedType. This information must be entered in this format:

[Business Unit]^[SpeedType]

For example, if the Business Unit is 0001 and the SpeedType is 11_01_01_00_00000_41012, then you would enter 0001^11_01_01_00_00000_41012.

If you don't know what value to enter, contact your PeopleSoft administrator for a list of the Business Units and SpeedTypes to be used with this Host System Account.

The value that you enter is not validated by Payment Gateway, so you must make sure you enter a valid value.

9 Select the Save Changes button.

10 Repeat Steps 7 through 9 for each payment method listed on the Link Payment Methods page.

11 Return to Step 5 and identify any other host system accounts that need to be configured for Banner general ledger integration.

16.2 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 store transactions 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 674**), 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 679**).

Common accounting codes are typically assigned to tax classes (see **"Tax Account Codes" on page 677**). 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 678**).

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New accounting codes are established by merchant managers for the following reasons:

- To serve as the default accounting code used by a store (see **"Configuring Store Settings" on page 680**),
- To associate with tax codes (see **"Products, Shipping, and Tax" on page 682**),
- To serve as the accounting code used by one or more uPay sites (see **"Configuring uPay Settings" on page 684**),
- To serve as an override accounting code used by one or more products (or product modifiers) in a store (see **"Products, Shipping, and Tax" on page 682**), and
- To serve as an override accounting code assigned to a delivery method in a shipping class (see **"Products, Shipping, and Tax" on page 682**).

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.

As each SpeedType of Business Unit is entered in Marketplace, it is validated with your PeopleSoft General Ledger system. If you enter an invalid value, you will be prompted to change the value. So each SpeedType or Business Unit value that you enter in Marketplace must be valid.

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 values. Likewise, contact the PeopleSoft administrator if a new PeopleSoft value is required.

16.3 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.

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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.

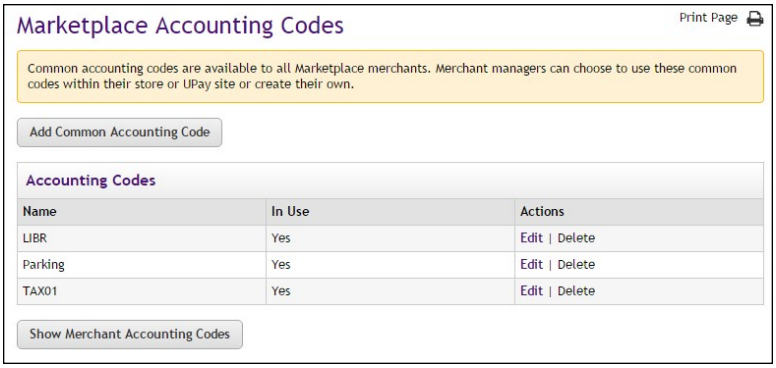
Configuration Setting for PeopleSoft: Adding Common Accounting Codes **Description**: Marketplace administrators can set up common accounting codes for use by Marketplace stores.
Left Navigation Menu: Marketplace Home > System Administration > Settings > Accounting Codes.
Page: Displays the Marketplace Accounting Codes page.

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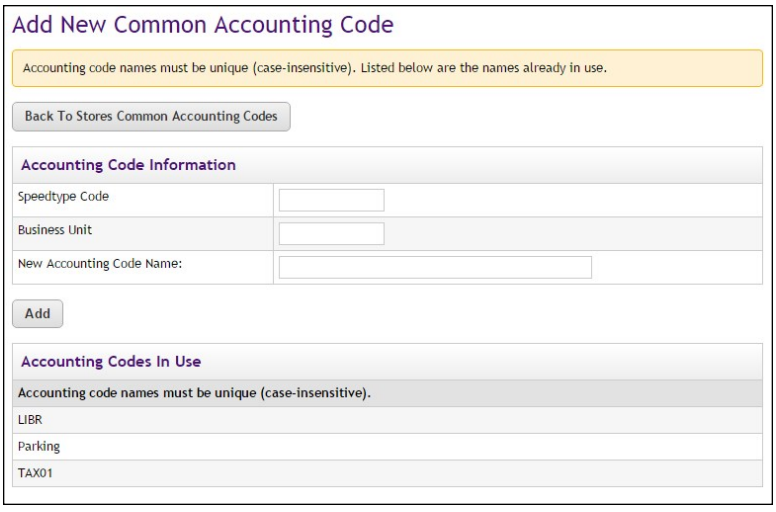
Configuration Setting for PeopleSoft: Adding Common Accounting Codes

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 stores.



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 an 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.

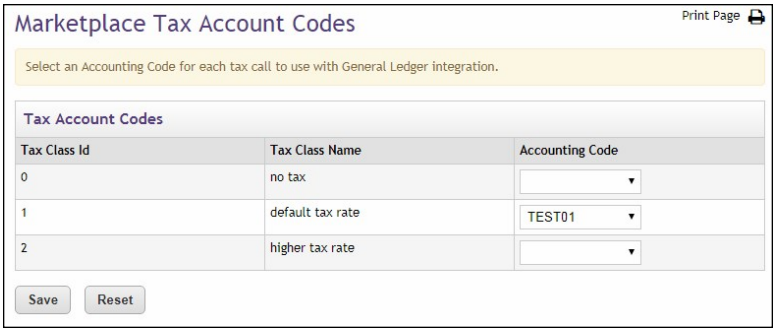


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Tax Account Codes

In the system administration settings, a Marketplace administrator can also assign accounting codes to tax classes.

The following table describes those system administration settings which affect tax account codes.

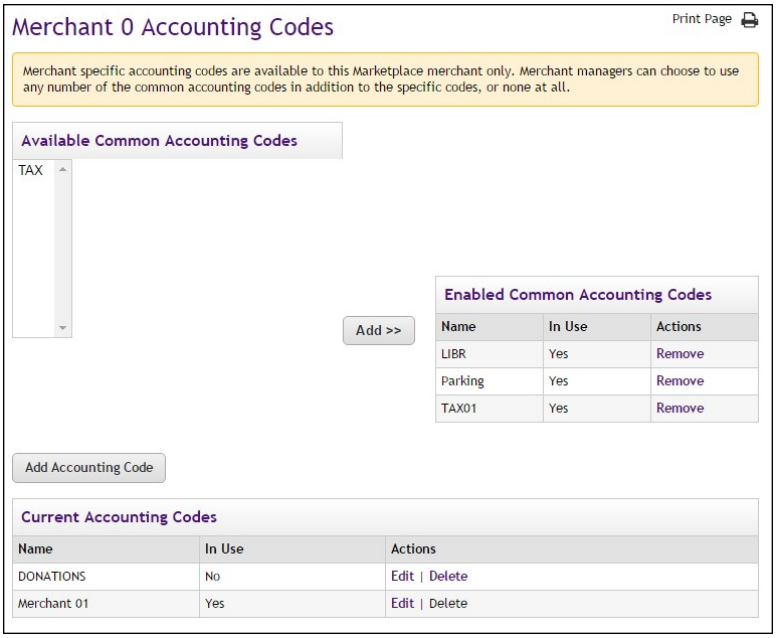
Configuration Setting: Establishing Tax Account Codes **Description:** Marketplace administrators can link accounting codes to tax classes, and these tax classes can be used for all Marketplace stores.
Left Navigation Menu: Marketplace Home > System Administration > Settings > Tax Account Codes.
Page: 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.  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 265**.

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16.4 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.

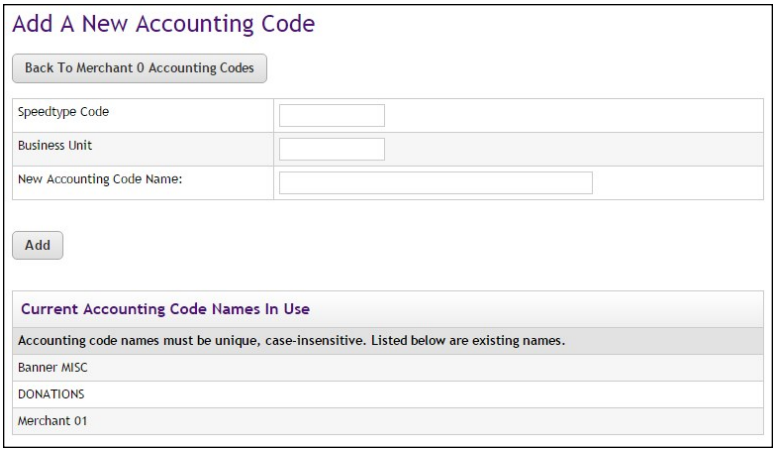


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Merchant Accounting Codes

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.

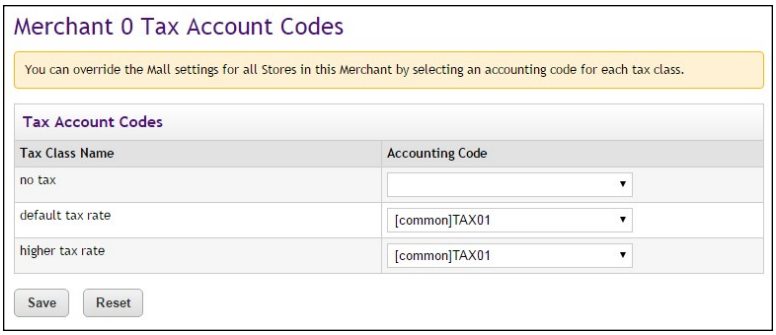
Configuration Setting for PeopleSoft: Add New Accounting codes **Description**: A Marketplace manager can add new accounting codes to be used by the merchant's stores and uPay sites and associate these accounting codes with SpeedType and business unit codes.
Left Navigation Menu: Marketplace Home > [merchant] > Accounting Codes.
Page: Displays the [Merchant] Accounting Codes page.
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 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 Codes" 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.

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The following table describes the merchant settings that affect tax account codes.

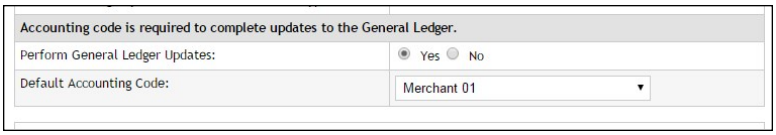
Configuration Setting: Establishing Tax Account Codes **Description**: Marketplace merchant managers can link accounting codes to tax classes at the merchant level. These tax classes are then available for use by the merchant's stores.
Left Navigation Menu: Marketplace Home > [merchant] >Tax Account 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.    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 265**.

16.5 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.

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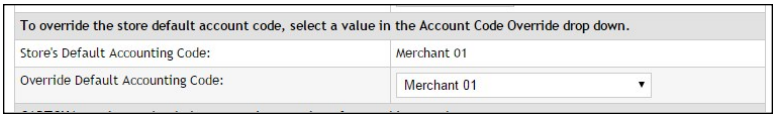
A store manager can select an accounting code override to use with a product, which if selected, overrides a store's default accounting code. In addition, a store manager can select the accounting code to use with special delivery methods in a shipping class and the accounting codes to use with taxes.

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. 

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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.      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 accounting 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 291**.

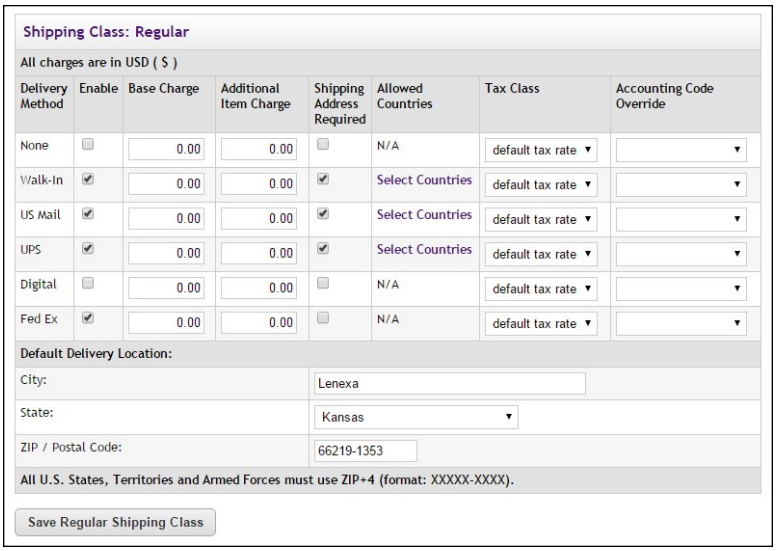
Configuration Setting: Selecting an Accounting Code Override for a Delivery Method **Description**: A Marketplace store manager can associate an accounting code with a delivery method in a shipping class.
Left Navigation Menu: Marketplace Home > [Merchant] > Stores > [Store Name] > Store Settings > Shipping Classes.
Page: Displays the [Store Name] Shipping Classes page.

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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.



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.

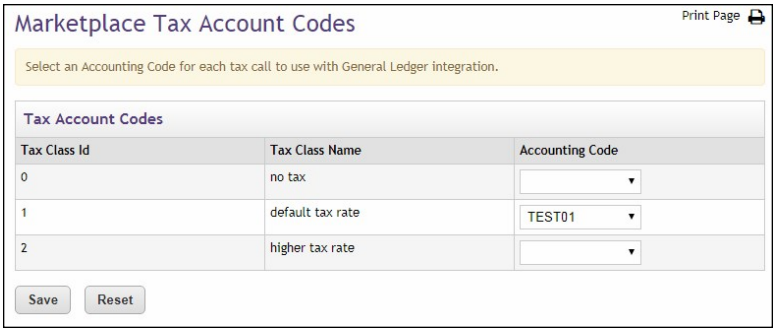
Page: Displays the [Store Name] Tax Account Codes page.

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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.



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 265**.

16.6 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.

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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 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.



16.7 Passing Accounting Codes to uPay

If you would like to pass accounting codes to your uPay site, as described in **"Passing Parameters to Your uPay Site" on page 526**, you must pass a combination of the applicable PeopleSoft Business Unit and SpeedType. This information must be entered in this format:

[Business Unit]^[SpeedType]

For example, if the Business Unit is 0001 and the SpeedType is 11_01_01_00_00000_41012, then you would enter 0001^11_01_01_00_00000_41012.

If you don't know what value to enter, contact your PeopleSoft administrator for a list of the Business Units and SpeedTypes.

The value that you enter is not validated by uPay or Payment Gateway, so you must make sure you enter a valid value.

Note: If you enter an incomplete or incorrect value for a passed accounting code, the transaction will still be accepted (provided the customer enters valid payment information); however, a GL exception will be generated. A uPay site manager should resolve any GL exceptions that result.

16.8 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

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or business unit value.

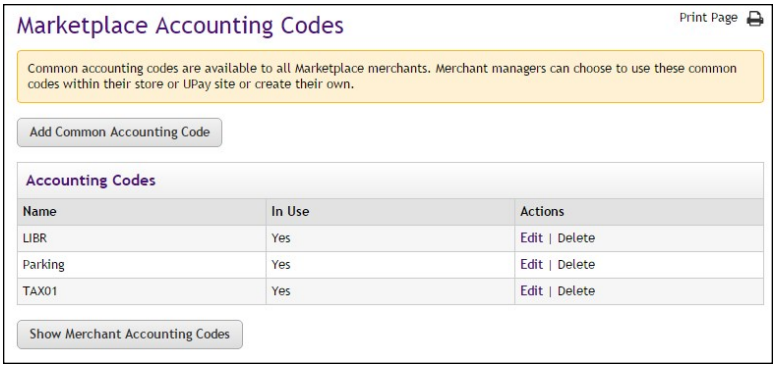
Configuration Setting to Maintain: Common Accounting Codes **Description**: Marketplace administrators can edit and delete common accounting codes.
Left Navigation Menu: Marketplace Home > System Administration > Settings > Accounting Codes.
Page: Displays the Marketplace Accounting Codes page.

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Configuration Setting to Maintain: Common Accounting Codes

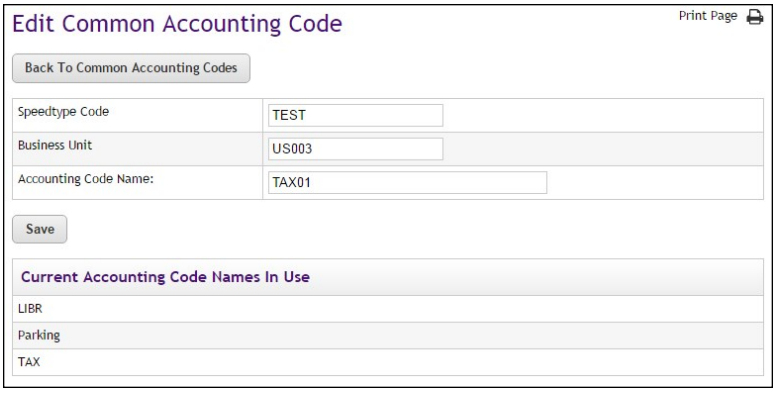
Description: Marketplace administrators can edit and delete common accounting codes.

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.



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).



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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.

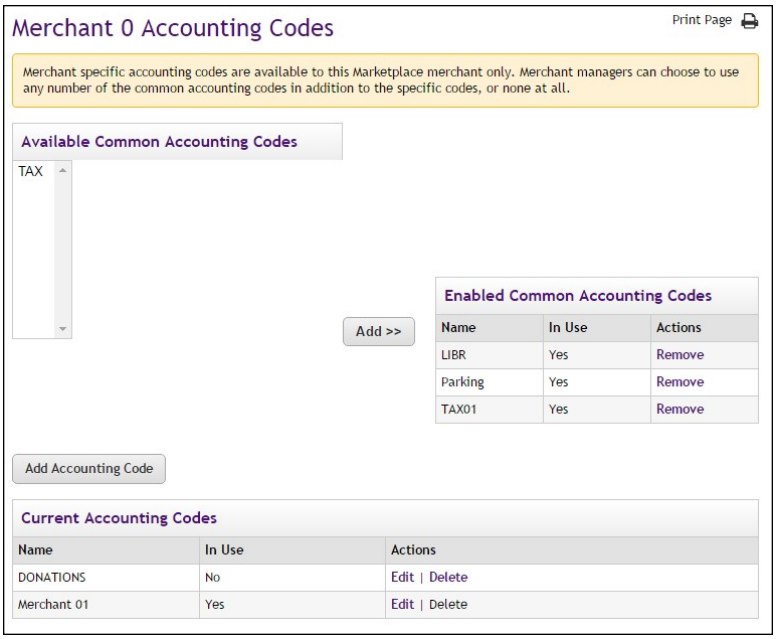
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Configuration Setting to Maintain: Merchant Accounting Codes

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.

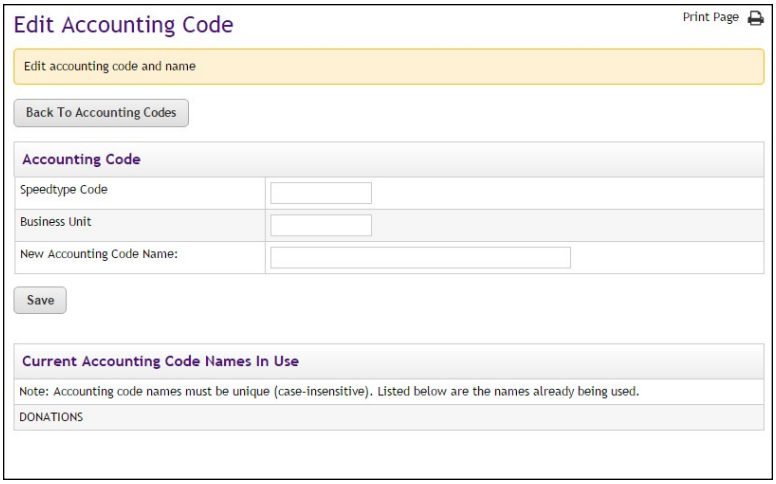


When you select the Edit link to edit an accounting code, the Edit Accounting Code page appears. Enter an approved SpeedType in the SpeedType Code field , and enter an approved business unit in the Business Unit field. (You will need to contact your institution's PeopleSoft administrator for a list of 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).

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Configuration Setting to Maintain: Merchant Accounting Codes

Description: Merchant managers can enable existing common accounting codes and edit merchant-specific accounting codes.



16.9 What to Expect in PeopleSoft

Once configuration for PeopleSoft has been completed, including turning on general ledger updates for one or more stores (or uPay sites), then various parameters and values are passed to the school's PeopleSoft system when each store order is fulfilled and when each uPay site transaction is processed.

The following sections describe what Marketplace sends and what schools can expect to see in PeopleSoft Finance.

What Marketplace Sends ...

When a transaction is completed, the following information is sent to the school's PeopleSoft Finance system and placed in the TN_JOURNAL_LOAD table:

- **Application**—The application value (always "TMS") is combined with the order number (for store transactions) or the system tracking ID (for uPay transactions). The resulting value then appears in PeopleSoft Finance's "Report ID" field. For example, if the order number is 1088, Marketplace combines "TMS" with "1088"—resulting as the value "TMS1088". (The database table field name for this field is TRANSACTION_ID.)
- **Order/Transaction ID**—This value is the Marketplace order ID for store transactions and the system tracking ID for uPay transactions.

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See "Application" above for a description of how this data appears in PeopleSoft Finance.

- **Business Unit**—When each Marketplace accounting code is created, a SpeedType value and a Business Unit value must be entered. This Business Unit value is then included when Marketplace sends transaction data to PeopleSoft Finance.
- **Amount**—Marketplace sends a complete set of transaction data for each monetary amount. For example, tax amount, shipment tax amount, shipping cost amount, and item amount are each sent separately to PeopleSoft with a complete set of transaction data.
- **Credit Account PeopleSoft Codes**—This data represents multiple values as related to a PeopleSoft SpeedType and a Business Unit. The SpeedType and Business Unit were entered as part of an accounting code in Marketplace. When a transaction is processed, Marketplace passes the SpeedType and Business Unit to PeopleSoft, and PeopleSoft responds with a list of the applicable PeopleSoft codes, which is sometimes referred to as a "Chartfield." This chartfield may include any or all of the following PeopleSoft codes:
  - ACCOUNT
  - ALTACCT
  - DEPTID
  - OPERATING UNIT
  - PRODUCT
  - FUND CODE
  - CLASS FIELD
  - PROGRAM CODE
  - BUDGET REFERENCE
  - AFFILIATE
  - AFFILIATE INTRA1
  - AFFILIATE INTRA2
  - PROJECT ID
  - CURRENCY CODE
  - STATISTICS CODE
  - CHARTFIELD1, CHARTFIELD2, & CHARTFIELD3

  Note: Marketplace does not send the SpeedType value to PeopleSoft Finance as part of the transaction data. Instead, it sends the Chartfield values.

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- **Values Configured in PeopleSoft Connect**—The following values may also be sent. These values are configured in TouchNet PeopleSoft Connect.
  - ACCOUNTING_DT—This value is a date, and it appears in this format: mm/dd/yyyy.
  - LEDGER_GROUP—This value comes from a PeopleSoft Connect properties file.
  - LEDGER—This value comes from a PeopleSoft Connect properties file.
  - BUSINESS_UNIT_GL—This value comes from a PeopleSoft Connect properties file. This field is different than the Business Unit value described above.
  - RATE_MULT—This value is typically "1.0".
  - RATE_DIV—This value is typically "1.0".
  - CURRENCY_CD—This value typically comes from a PeopleSoft Connect properties file. If no value has been configured in the properties file, then "USD" is sent as the default value.
- **Other Values Sent by PeopleSoft Connect**—The following values are not provided by Marketplace or Payment Gateway. These values are assigned by PeopleSoft Connect and will be different for each transaction.
  - DTTM_STAMP—This value represents the date and time for when the general ledger data was sent through PeopleSoft Connect.
  - SEQUENCENO—This is a unique value assigned to the general ledger data.
- **Debit Account PeopleSoft Codes**—This data represents multiple values as related to a PeopleSoft SpeedType and a Business Unit. The SpeedType and Business Unit were configured in Payment Gateway as the Host Payment Method ID. Each Host System Account has its own linked payment methods, and each payment method has its own Host Payment Method ID. During the process of updating the general ledger system, Marketplace passes the debit account SpeedType and Business Unit to PeopleSoft, and PeopleSoft responds with a list of the applicable PeopleSoft codes (sometimes known as a "Chartfield"), which may include any or all of the codes listed above for the credit account. Marketplace sends this data to PeopleSoft for the debit account.

Where to Find This Info in PeopleSoft ...

Transaction data from Marketplace can be found in PeopleSoft Finance by doing a query of the transactions in the TN_JOURNAL_LOAD table. This query, for example, might look for all the transactions in which PeopleSoft

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Finance's Report ID field (called the TRANSACTION_ID field in the database table) starts with "TMS"—thus returning all Marketplace transactions. Or a query might be used to look for a specific transaction by searching for a specific system tracking ID contained in the Report ID field.

The following table describes where to view Marketplace transaction data in your PeopleSoft general ledger system:

The following Marketplace transaction data ...	Can be found In this field when you do a query of the TN_JOURNAL_LOAD table in PeopleSoft Finance ...
Application	Application is combined with order ID (for store transactions) or system tracking ID (of uPay transactions) in the Report ID field. The database table field name for this field is TRANSACTION_ID. (For more information, see "What Marketplace Sends ..." above.)
Order ID or System Tracking ID	Order ID (or External Trans ID) is combined with the Application value in the Report ID field. (For more information, see "What Marketplace Sends ..." above.)
SpeedType and Business Unit	Multiple fields are involved. During the transaction process, Marketplace passes the SpeedType and Business Unit to PeopleSoft, and PeopleSoft responds with the "Chartfield" values. Subsequently, Marketplace sends the Chartfield values to PeopleSoft Finance. **Note:** Marketplace does not send the SpeedType value to PeopleSoft Finance as part of the transaction data. Each Charftfield value appears in its own field in PeopleSoft Finance. Most of these fields have self-explanatory names: ACCOUNT becomes "Account"; Fund Code becomes "FUND"; DEPTID becomes "Dept"; PROGRAM CODE becomes "Program"; PROJECT ID becomes "Project"; and "OPERATING UNIT" becomes "Oper Unit". (For a complete list of these fields, see "What Marketplace Sends ..." above.)

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17.0 Setup for Workday

If your institution uses Workday financial management software, you can integrate its general ledger functionality with TouchNet Marketplace. Workday general ledger integration typically takes places when Marketplace is implemented for a school in the TouchNet Data Center.

When Workday general ledger integration is turned on, fields become available in the Marketplace Operations Center for configuring which Worktags will be available. These Worktags must be associated with Marketplace accounting codes, and values for these Worktags are saved. In turn, Marketplace accounting codes can be associated with stores, uPay sites, products, product modifiers, taxes, and shipping classes.

In addition, when Workday integration is turned on for your installation of Marketplace, individual stores and uPay sites can optionally enable Workday general ledger reporting. Additional fields will then appear in the store settings and uPay site settings for entering a Company name and a Bank Account ID.

When transactions then take place general ledger information is sent to Workday. This information includes Worktag names and values, a Company name, a Bank Account ID, the transaction purpose (optional), the transaction amount, and other data.

The configuration steps for establishing Workday general ledger reporting with Marketplace are described in the following sections.

Hi Steps for Workday Setup

The following steps summarize how to use the Marketplace Operations Center to establish general ledger integration for Workday.

1. A Marketplace administrator enters general settings. See **"General Settings" on the next page**
2. A Marketplace administrator enters a list of common Worktags to be available for all Marketplace merchants, stores, and uPay sites. See **"Common Worktags" on page 699**.
3. A Marketplace administrator creates common accounting codes. See **"Common Accounting Codes" on page 701**.
4. A Marketplace administrator assigns a common accounting code to each tax class. See **"Tax Account Codes" on page 703**.
5. For each Marketplace merchant, a merchant manager enables common accounting codes for use by the merchant's stores and uPay sites. See **"Configuring Merchant Settings" on page 704**
6. For each Marketplace merchant, a merchant manager enters a list of additional Worktags to be available for the merchant's stores and uPay sites. See **"Merchant Worktags" on page 705**
7. For each Marketplace merchant, a merchant manager adds new accounting codes, as necessary. These codes may include 1) store

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default accounting codes, 2) uPay site accounting codes, 3) override accounting codes to be used by products and product modifiers, 4) override accounting codes for shipping classes, and 5) accounting codes for tax classes. See **"Merchant Accounting Codes" on page 707**.

8. For each Marketplace store and uPay site, a merchant manager (or store manager or uPay site manager) turns on general ledger functionality and enters Workday settings—including a Company name and a Bank Account ID. See **"Configuring Store Settings" on page 711** and **"Configuring uPay Settings" on page 716**.
9. For each Marketplace store, a store manager can assign override accounting codes to products, product modifiers, shipping classes, and tax classes. See **"Products, Shipping, and Tax" on page 713**.

General Settings

With Marketplace 8, Feature Pack 1, a new General Settings section has been added to the Workday Accounting Codes page. This section includes the Default Company and Default Bank Account ID values and a new optional Default Transaction Purpose value.

In the system administration settings, on the Accounting Codes page, a Marketplace administrator can add or edit the General Settings values. When a common accounting code is added or edited the default values for Company, Bank Account ID, and Transaction Purpose (optional) will display.

The following table describes how to enter the general settings.

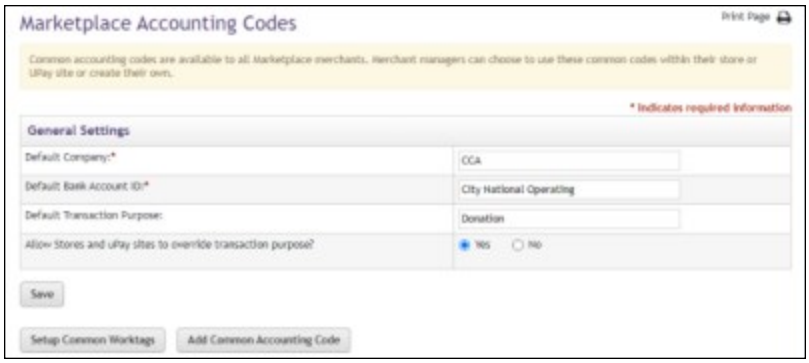
General Settings for Workday: Adding General Settings **Description**: Marketplace administrators can add the Default Company, Default Bank Account ID, Default Transaction Purpose, and select to override transaction purpose. When values are entered, the default value will apply to all uStores and uPay site transactions, unless an override is provided.
Left Navigation Menu: Marketplace Home > System Administration > Settings > Accounting Codes.
Page: Displays the Marketplace Accounting Codes page.

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General Settings for Workday: Adding General Settings

Description: Marketplace administrators can add the Default Company, Default Bank Account ID, Default Transaction Purpose, and select to override transaction purpose. When values are entered, the default value will apply to all uStores and uPay site transactions, unless an override is provided.

The Marketplace Accounting Codes page includes a General Settings section.



For the Default Company and Bank Account ID fields, these values are used to validate Worktag combinations. You can override these values at the Common Worktag level, as necessary.

Only Ledger_Account_ID is preconfigured (although you can change the name of this Worktag if necesary). This Worktag is required for all Marketplace accounting codes.

The Default Transaction Purpose field is an optional field for Workday. You will need to evaluate your use case to consider if you would like the value to vary per store/site, then set the override value to Yes to allow overrides. If you would like the same value for all stores/sites, then set the override value to No. Click the Add Row button to add a new Worktag to this page.

17.1 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 store transactions or uPay transactions take place, information stored with these accounting codes is sent to your Workday financial management system—including the associated Worktags and other related information.

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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 674**), 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 679**).

Common accounting codes are typically assigned to tax classes (see **"Tax Account Codes" on page 677**). 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 accounting code must first be "enabled" by a merchant manager (see **"Configuring Merchant Settings" on page 678**).

New accounting codes are established by merchant managers for the following reasons:

- To serve as the default accounting code used by a store (see **"Configuring Store Settings" on page 680**),
- To associate with tax codes (see **"Products, Shipping, and Tax" on page 682**),
- To serve as the accounting code used by one or more uPay sites (see **"Configuring uPay Settings" on page 684**),
- To serve as an override accounting code used by one or more products (or product modifiers) in a store, (see **"Products, Shipping, and Tax" on page 682**),
- To serve as an override accounting code used by taxes classes for a store, (see **"Products, Shipping, and Tax" on page 682**), and
- To serve as an override accounting code assigned to a shipping class (see **"Products, Shipping, and Tax" on page 682**).

Accounting code fields are only available in stores and uPay sites if general ledger reporting has been enabled.

About Worktags

For Workday general ledger reporting, Marketplace makes extensive use of Worktags, which you associate with Marketplace accounting codes. Before you create Marketplace accounting codes, you must enter the name of each Worktag that you would potentially like to use. Marketplace validates the name of each Worktag with Workday. And once you have entered the name of the available Worktags, you can then associate these Worktags with your Marketplace accounting codes.

Ledger_Account_ID is required with all Marketplace accounting codes. Other Worktags can be added and designated as required fields.

During the Marketplace uStores fulfillment process, the Workday codes are passed to your Workday general ledger system. Likewise, when uPay

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transactions are processed, the associated Workday codes are passed to your Workday general ledger system.

Workday Finance

Before you use Worktags with Marketplace, we strongly recommend you contact your Workday Finance administrator. The administrator will need to consider the Worktags that will be used and determine if additional configuration within Workday Finance is necessary. This configuration provides rules that indicate which Worktags can be jointly used.

Note: When a Marketplace user attempts to save a Marketplace accounting code (which is composed of a collection of Worktags), Marketplace sends an Ad-Hoc Bank Transaction to Workday using validate mode (with the available Workday API). The collection of Worktags used by the Marketplace accounting code must be recognized by rules in your Workday Finance system as being valid for this purpose.

17.2 Configuring System Administration Settings

In the system administration settings of the Marketplace Operations Center, a Marketplace administrator can designate which Worktags should be considered "common" Worktags. Worktags that are designated "common" Worktags are available when Marketplace accounting codes are configured. Values can be associated with each of these Worktags.

A system administrator can assign default Marketplace accounting codes to the tax classes.

Here are descriptions of how to configure the system administration settings for general ledger functionality.

Common Worktags

In the system administration settings, a Marketplace administrator must enter the common Worktags that will be used with the common accounting codes. Additional common worktags can be created that will be shared by all the merchants. Keep in mind that Worktags can be configured at the merchant level, and the merchant Worktags can only be used with a merchant's own accounting codes.

The following table describes how to enter the common Worktags.

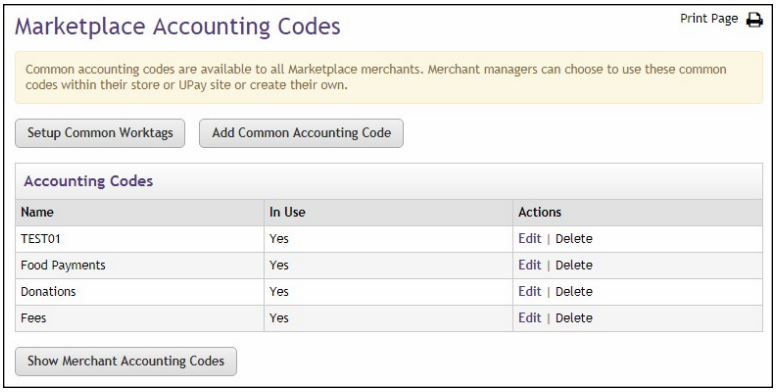
Configuration Setting for Workday: Adding Common Worktags **Description**: Marketplace administrators can set up common Worktags for use by all Marketplace merchants.
Left Navigation Menu: Marketplace Home > System Administration > Settings > Accounting Codes.
Page: Displays the Marketplace Accounting Codes page.

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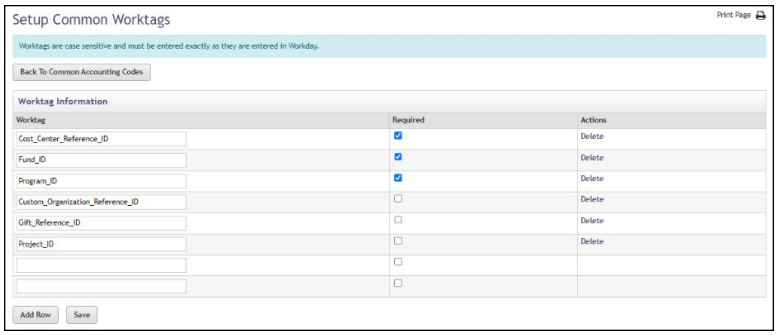
Configuration Setting for Workday: Adding Common Worktags

Description: Marketplace administrators can set up common Worktags for use by all Marketplace merchants.

The Marketplace Accounting Codes page lists all the common accounting codes that have currently been established for use by Marketplace stores. (The merchant-specific accounting codes can be viewed by selecting the "Show Merchant Accounting Codes" button.)



Select the Setup Common Worktags button. The Setup Common Worktags page is then displayed.



Marketplace has previously required the Ledger Account ID to be present in all accounting codes for posting. This requirement has been removed and the Ledger Account ID worktag can be added or deleted from accounting code structures, like any other worktag.

Important! When Ledger Account ID is not used, the Revenue Category or Spend Category worktag is required.

Click the Add Row button to add a new Worktag to this page.

Select the Required checkbox to ensure that a Worktag value must be configured for all Marketplace accounting codes.

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Editing Worktags

If at any time you modify the set of common Worktags (by adding new Worktags or deleting/changing existing Worktags), you must consider how these modifications will affect existing accounting codes. We strongly recommend that you review all accounting codes after you edit the common worktags and determine if the existing accounting codes need to be modified as well.

For example, if you add a new Worktag and make it a required field, your existing accounting codes will not consider this field to be a required field until you edit the accounting codes, at which point you must then enter a value for this required field. But if you do not take this action to edit each accounting code, then your accounting codes will be missing a saved value for the new required Worktag—which may result in a general ledger exception when a transaction is submitted to Workday.

Common Accounting Codes

In the system administration settings, a Marketplace administrator can create common accounting code and associate Worktags with these accounting codes.

The following table describes how to create a common accounting code.

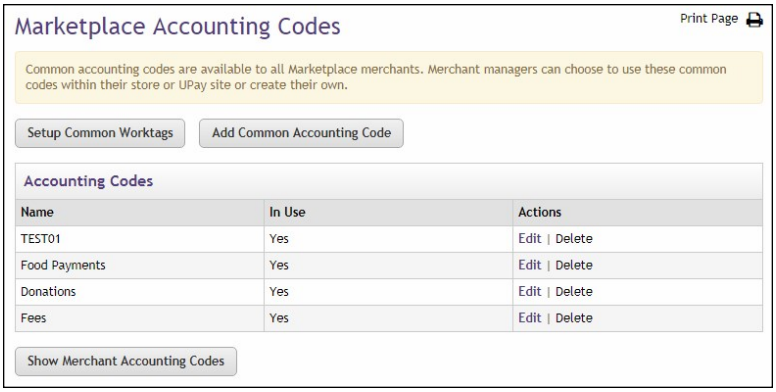
Configuration Setting for Workday: Adding Common Accounting Codes **Description**: Marketplace administrators can set up common accounting codes for use by Marketplace merchants.
Left Navigation Menu: Marketplace Home > System Administration > Settings > Accounting Codes.
Page: Displays the Marketplace Accounting Codes page.

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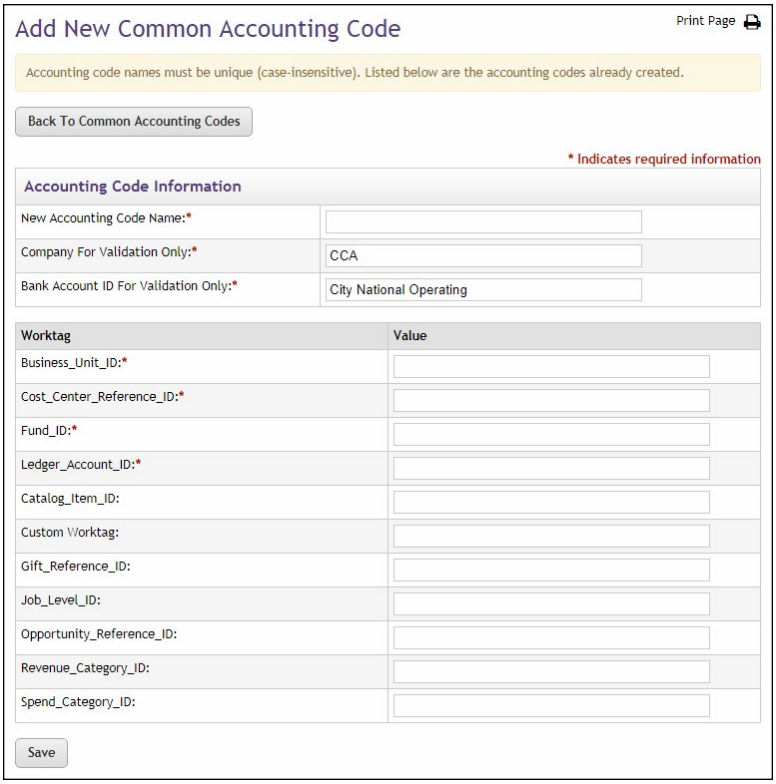
Configuration Setting for Workday: Adding Common Accounting Codes

Description: Marketplace administrators can set up common accounting codes for use by Marketplace merchants.

Actions: The Marketplace Accounting Codes page lists all the common accounting codes that have currently been established for use by Marketplace stores.



To add a new accounting code, select the Add Common Accounting Code button, which displays the Add New Common Accounting Code page.



Enter a name for this code in the New Accounting Code Name field (25

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Configuration Setting for Workday: Adding Common Accounting Codes **Description**: Marketplace administrators can set up common accounting codes for use by Marketplace merchants.
characters maximum). The name you assign must be unique. Names already in use are displayed in the "Accounting Codes" table at the bottom of the page. Enter a Company name to be used during the validation process. (The value to be used during real transactions is assigned in the store settings and uPay site settings.) This value equates with the Company_Reference in Workday and represents an existing company that holds the asset. Enter a Bank Account ID to be used during the validation process.(The value to be used during real transactions is assigned in the store settings and uPay site settings.) This value equates with Bank_Account_Reference in Workday and represents the bank used for the debit side of the transaction. **Note:** Default values for "Company for Validation Only" and "Bank Account ID for Validation Only" were entered in a Marketplace property file when Workday was configured for your institution in the TouchNet Data Center. You can use the default values or enter different values. Enter values in each Worktag field. The fields marked with a red asterisk are required. The other Worktag fields are optional. The values that you enter will be automatically used when common accounting codes are enabled for use by a merchant. The Worktag values for a common accounting code cannot be modified by a merchant.

Tax Account Codes

In the system administration settings, a Marketplace administrator can also assign accounting codes to tax classes.

The following table describes 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.

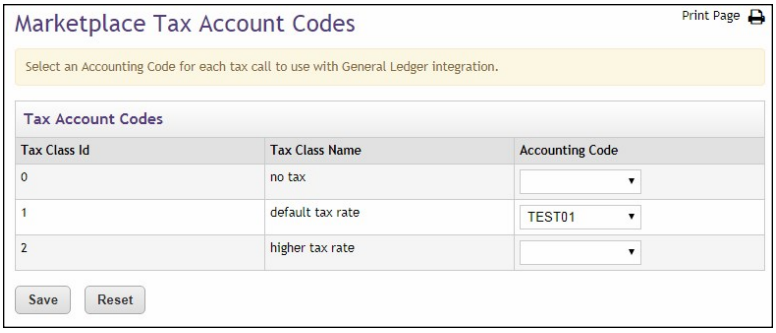
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Configuration Setting: Establishing Tax Account Codes

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.



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.

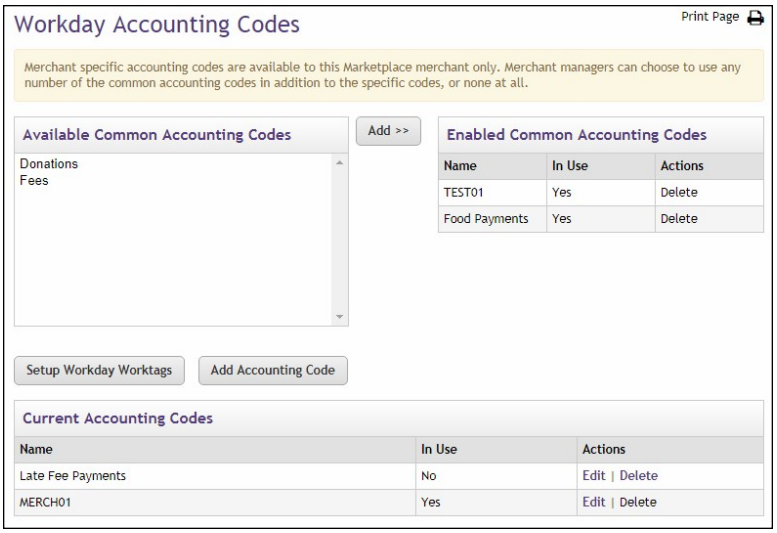
Note: Stores that use the Marketplace tax service never use the "higher tax rate": The tax service only uses the "no tax" and "default tax rate" tax classes. The higher tax rate is only available with campus-maintained tax rate files. For more about the Marketplace tax service, see **"Taxes" on page 265**.

17.3 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. A merchant manager can also enter Worktags for use with that merchant's accounting codes.

In addition to enabling existing common accounting codes, a merchant manager can establish new accounting codes. These merchant accounting codes can include both common Worktags and merchant Worktags. A merchant accounting code is available for use only by an individual merchant's stores and uPay sites.

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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 on the left and clicking the Add button, you can add accounting codes to the Enabled Common Accounting Codes list on the right. Once you enable a common accounting code, it is then available for use by the merchant's stores and uPay sites. 

Merchant Worktags

In the merchant settings, a Marketplace merchant manager can configure additional Worktags for use with merchant accounting codes.

The following table describes how to enter the merchant Worktags.

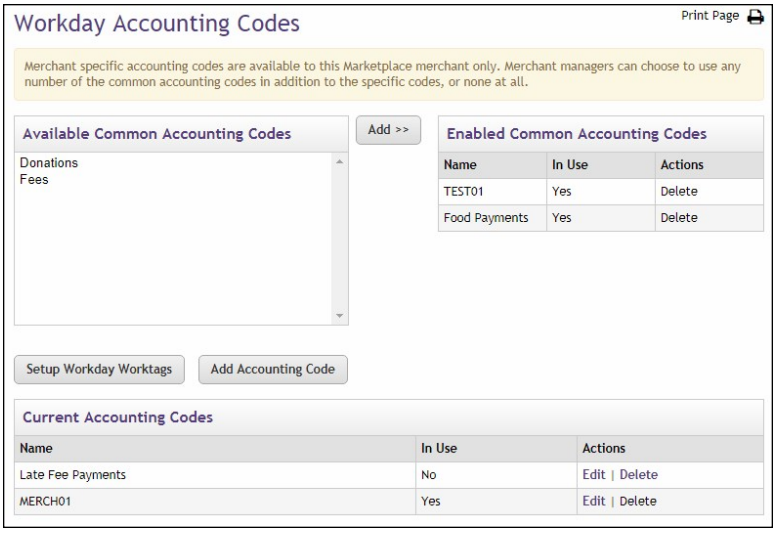
Configuration Setting for Workday: Adding Worktags **Description**: Marketplace merchant managers can add Worktags for use with merchant accounting codes.
Left Navigation Menu: Marketplace Home > [merchant] > Accounting Codes.
Page: Displays the [merchant] Accounting Codes page.

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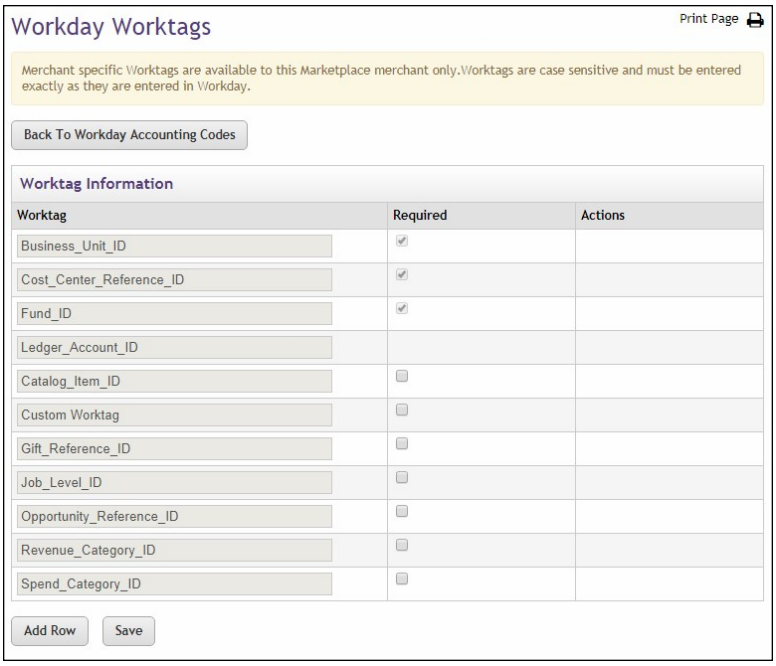
Configuration Setting for Workday: Adding Worktags

Description: Marketplace merchant managers can add Worktags for use with merchant accounting codes.

Actions: The [merchant] Accounting Codes page lists the common accounting codes that have been enabled for use by the merchant. It also lists the merchant accounting codes that have been added.



Select the Setup Workday Worktags button. The Workday Worktags page then appears.



The names of all common Worktags (from the Administrative settings),

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Configuration Setting for Workday: Adding Worktags **Description**: Marketplace merchant managers can add Worktags for use with merchant accounting codes.
including Ledger_Account_ID, will be grayed out and cannot be modified at the merchant level. If a common Worktag is optional, you can select the required checkbox to make it required for the merchant's accounting codes. The names of merchant Worktags are editable on the Worktags page. Click the Add Row button to add a new Worktag to this page. Select the Required checkbox to ensure that this Worktag value must be configured when adding merchant accounting codes.

Editing Worktags

If at any time you modify the set of Worktags (by adding new Worktags or deleting/changing existing Worktags), you must consider how these modifications will affect existing accounting codes. We strongly recommend that you review all accounting codes after you edit the worktags and determine if your existing merchant accounting codes need to be modified as well.

For example, if you add a new Worktag and make it a required field, your existing accounting codes will not consider this field to be a required field until you edit the accounting codes, at which point you must then enter a value for this required field. But if you do not take this action to edit each accounting code, then your accounting codes will be missing a saved value for the new required Worktag—which may result in a general ledger exception when a transaction is submitted to Workday.

Merchant Accounting Codes

Marketplace merchants can create accounting codes that will be used by that merchant's stores and uPay sites.

The following table describes how to add new accounting codes and edit existing codes.

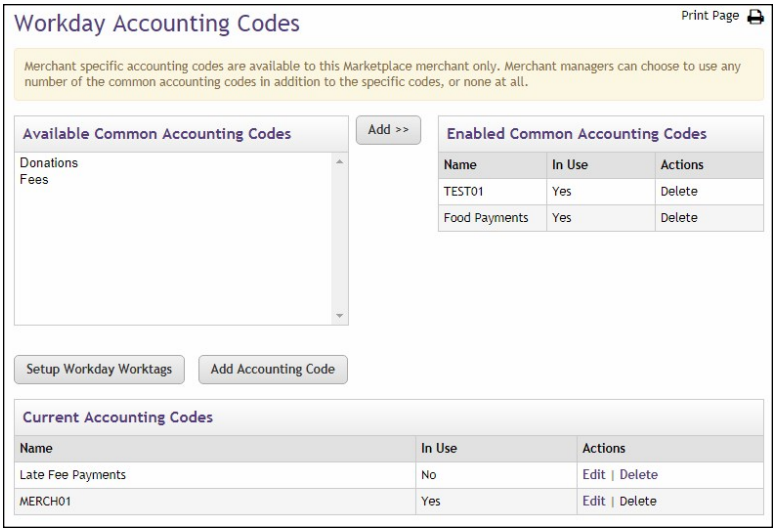
Configuration Setting for Workday: Add New Accounting codes **Description**: A Marketplace manager can add accounting codes to be used by the merchant's stores and uPay sites. Worktags must be associated with these merchant accounting codes.
Left Navigation Menu: Marketplace Home > [merchant] > Accounting Codes.
Page: Displays the [Merchant] Accounting Codes page.

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Configuration Setting for Workday: Add New Accounting codes

Description: A Marketplace manager can add accounting codes to be used by the merchant's stores and uPay sites. Worktags must be associated with these merchant accounting codes.

Actions: The [merchant] Accounting Codes page lists the common accounting codes that have been enabled for use by the merchant. It also lists the merchant accounting codes that have been added.

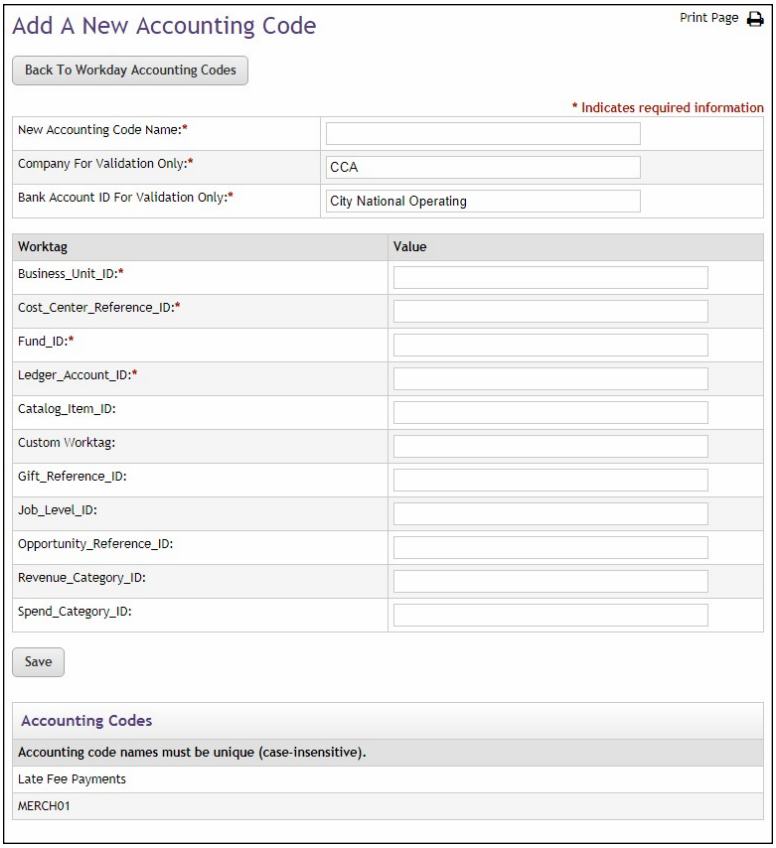


Select the Add Accounting Code button. The Add a New Accounting Code page then appears.

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Configuration Setting for Workday: Add New Accounting codes

Description: A Marketplace manager can add accounting codes to be used by the merchant's stores and uPay sites. Worktags must be associated with these merchant accounting codes.



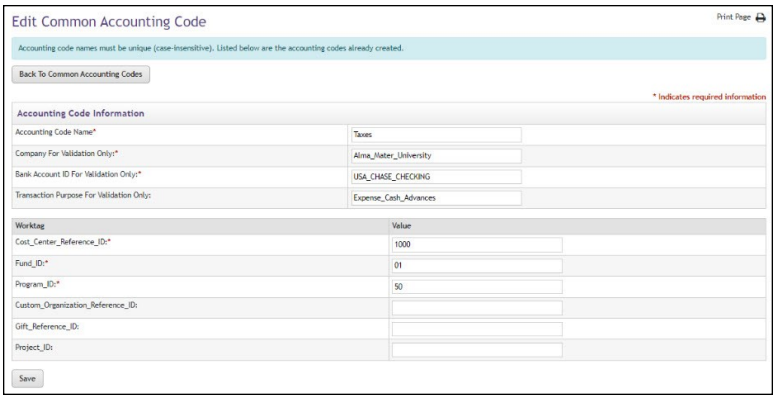
Enter a name for this code in the New Accounting Code Name field (25 characters maximum). The name you assign must be unique. Names already in use are displayed in the "Accounting Codes" table at the bottom of the page.

Enter a Company name to be used during the validation process. (The value to be used during real transactions is assigned in the store settings and uPay site settings.) This value equates with the Company_Reference in Workday and represents an existing company that holds the asset.

Enter a Bank Account ID to be used during the validation process.(The value to be used during real transactions is assigned in the store settings and uPay site settings.) This value equates with Bank_Account_Reference in Workday and represents the bank used for the debit side of the transaction.

Note: Default values for "Company for Validation Only" and "Bank Account ID for Validation Only" were entered in a Marketplace property

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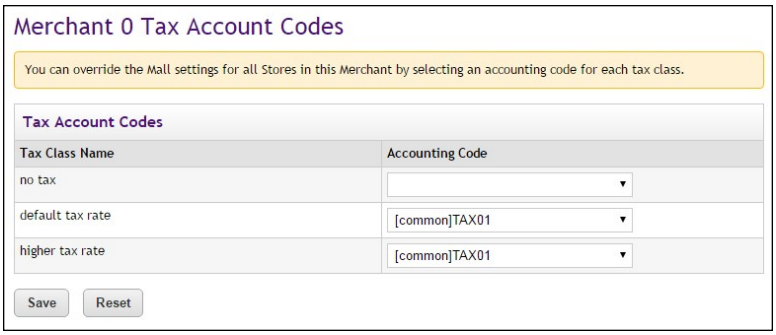
Configuration Setting for Workday: Add New Accounting codes **Description**: A Marketplace manager can add accounting codes to be used by the merchant's stores and uPay sites. Worktags must be associated with these merchant accounting codes.
file when Workday was configured for your institution in the TouchNet Data Center. You can use the default values or enter different values. Enter values in each Worktag field. The fields marked with a red asterisk are required. The other Worktag fields are optional. The values that you enter will be sent to Workday when a transaction takes place for a product or uPay site that uses this accounting code.
Configuration Setting for Workday: Edit Accounting codes **Description**: A Marketplace manager can edit a specific accounting code used by the merchant's stores and uPay sites. Worktags must be associated with these merchant accounting codes.
   Edit the specific fields for the accounting code and press the Save button when finished.

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.

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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.  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 265**.

17.4 Configuring Store Settings

Before Marketplace will send general ledger updates to Workday for a store, the Perform General Ledger Updates option must be turned on, and once this option is turned on, a default accounting code must be selected. In addition, a Company name and Bank Account ID must be entered.

A store manager can optionally select override accounting codes to use for products, product modifiers, and shipping classes. In addition, a store manager can select the accounting codes to use with taxes.

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With Marketplace 8, Feature Pack 1, you can now override the Default Company, Default Bank Account ID, and Default Transaction Purpose using the General Settings on the Accounting Codes.

Configuration Setting: Turning On General Ledger Functionality

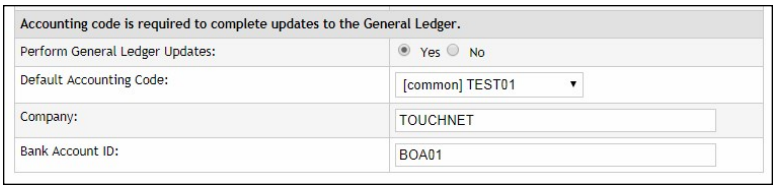
Description: A Marketplace merchant manager or store manager can turn on general ledger functionality, select a default accounting code, and enter Company and Bank Account ID values.

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 merchant accounting codes.



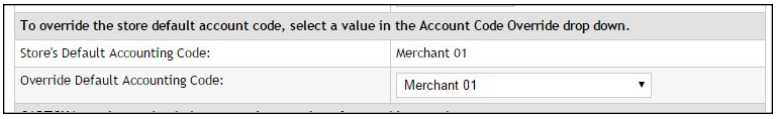
Enter a Company name. This value equates with Company_Reference in Workday and represents an existing company that holds the asset.

Enter a Bank Account ID. This value equates with Bank_Account_ Reference in Workday and represents the bank used for the debit side of the transaction.

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Products, Shipping, and Tax

Several additional general ledger settings can be configured at the store level: override accounting code can be assigned to products, product modifiers, and delivery methods. In addition, accounting codes can be assigned to tax classes. 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 [Product Name] Product Settings page. The store's default accounting code will be used unless you select an override accounting code 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 accounting code. **Note:** You can also select an override accounting code when you add a new product, and you can set an override accounting code when you import a product list. For more information, see **"Importing Product Lists" on page 291**.

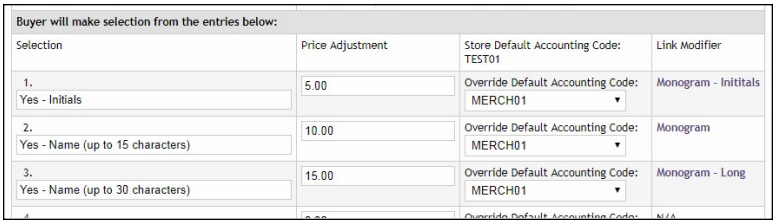
Configuration Setting: Selecting an Accounting Code Override for a Product Modifier **Description**: A Marketplace store manager can assign an accounting code override to a product modifier.
Left Navigation Menu: Marketplace Home > [Merchant] > Stores > [Store Name] > Store Settings >Products.
Page: Displays the [Store Name] Products page.

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Configuration Setting: Selecting an Accounting Code Override for a Product Modifier

Description: A Marketplace store manager can assign an accounting code override to a product modifier.

Actions: Click a product name to display the associated [Product Name] Product Settings page, and on this page, select the Manage Modifiers link. When the Manage Modifiers page appears, select the Edit link in the Action column to see the settings for the product modifier.



Different override accounting codes can be selected for each modifier value (for those modifiers with multiple values).

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.

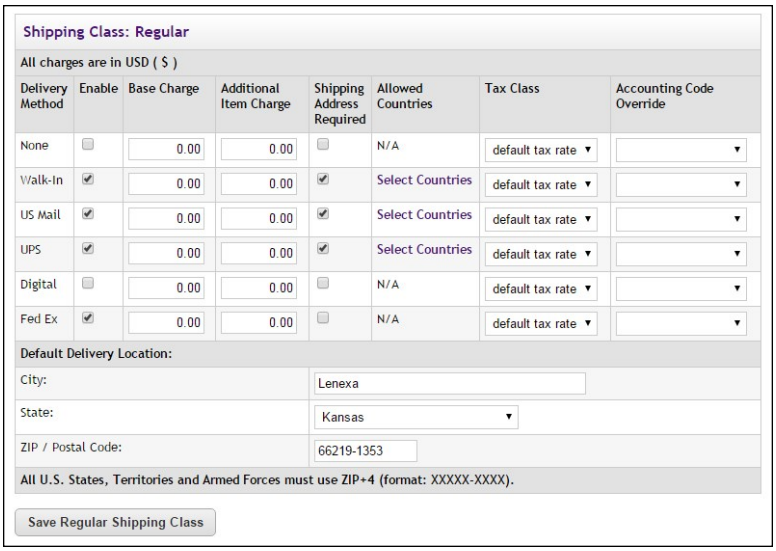
Page: Displays the [Store Name] Shipping Classes page.

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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.



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.

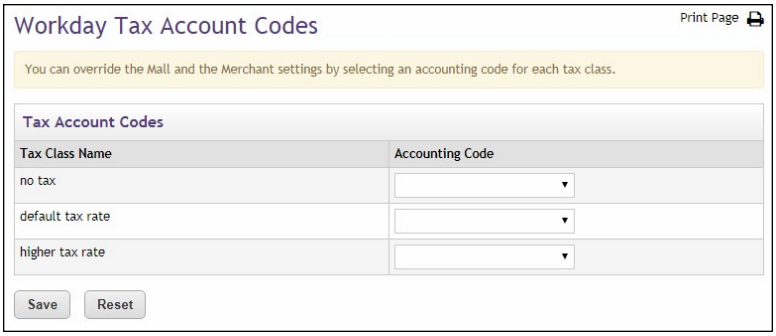
Page: Displays the [Store Name] Tax Account Codes page.

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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.



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 265**.

17.5 Configuring uPay Settings

In order for general ledger codes to be reported to Workday 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.

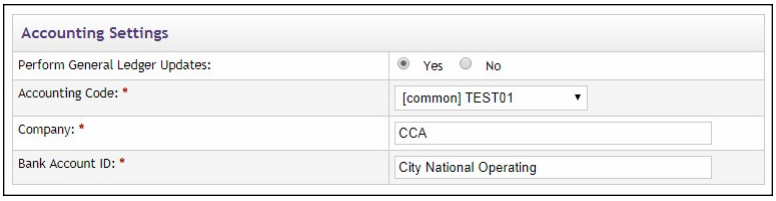
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Configuration Setting: Selecting a uPay Site Accounting Code

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 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 merchant accounting codes established by a merchant manager.



Enter a Company name. This value equates with Company_Reference in Workday and represents an existing company that holds the asset.

Enter a Bank Account ID. This value equates with Bank_Account_ Reference in Workday and represents the bank used for the debit side of the transaction.

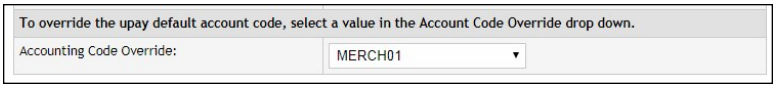
Configuration Setting: Selecting an Accounting Code for uPay Additional Donation

Description: A Marketplace merchant manager or uPay site manager can select an override accounting code to be used with an additional donation.

Left Navigation Menu: Marketplace Home > [Merchant] > uPay Sites > [uPay Site Name] > Additional Donation.

Page: Displays the [uPay Site] Additional Donation page.

Actions: When the Additional Donation page appears, use the Accounting Code Override field to select an accounting code to use with this additional donation.



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17.6 Passing Accounting Codes to uPay

You can pass parameters from a campus web application to your uPay site, as described in **"Passing Parameters to Your uPay Site" on page 526**. For the CREDIT_ACCT_CODE parameter, you must pass a Ledger ID and all applicable Worktags and their values. You must pass these values with valid XML. CREDIT_ACCT_AMT must also be passed.

> ***Important!*** When you pass the CREDIT_ACCT_CODE parameter, none of the values associated with the uPay site's assigned Marketplace accounting code will be used, so you must ensure that you send a complete set of Workday general ledger data.

Additional sets of data may be sent with CREDIT_ACCT_CODE_# (example: CREDIT_ACCT_CODE_2) 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.

Here is an example of XML passed for the CREDIT_ACCT_CODE field:

```
<ACCOUNT_INFO>
<LEDGER id="54000">
<PARENT />
</LEDGER>
<SPEND_CATEGORY />
<REVENUE_CATEGORY />
<WORKTAG type="Spend_Category_ID">Spend_Cat_Office_
Supplies</WORKTAG>
<WORKTAG type="Business_Unit_ID">42</WORKTAG>
<WORKTAG type="Cost_Center_Reference_ID">CC_
43010</WORKTAG>
<WORKTAG type="Catalog_Item_ID" />
<WORKTAG type="Job_Level_ID" />
<WORKTAG type="Gift_Reference_ID">00000</WORKTAG>
<WORKTAG type="Fund_ID">10</WORKTAG>
</ACCOUNT_INFO>
```

The following rules must be followed when passing XML for the CREDIT_ACCT_CODE parameter:

- The entire set of XML must be wrapped with <ACCOUNT_INFO> and </ACCOUNT_INFO>
- The XML can be one string or multiple lines.

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- Any number of WORKTAG fields can be passed, but the name of the Worktag must be specified in the "type" field and the value must be specified between the open and close WORKTAG tags.
- A value for LEDGER must be passed in the "id" field or a GL exception will occur.
- Values for SPEND_CATEGORY and REVENUE_CATEGORY may optionally be passed. The values for these tags must be passed between the corresponding open and close tags.
- The passed XML must not exceed 2000 total characters.

If you do not know what values to enter, be sure to contact your Workday administrator.

The value that you enter is not validated by uPay, so you must make sure you enter valid Workday values.

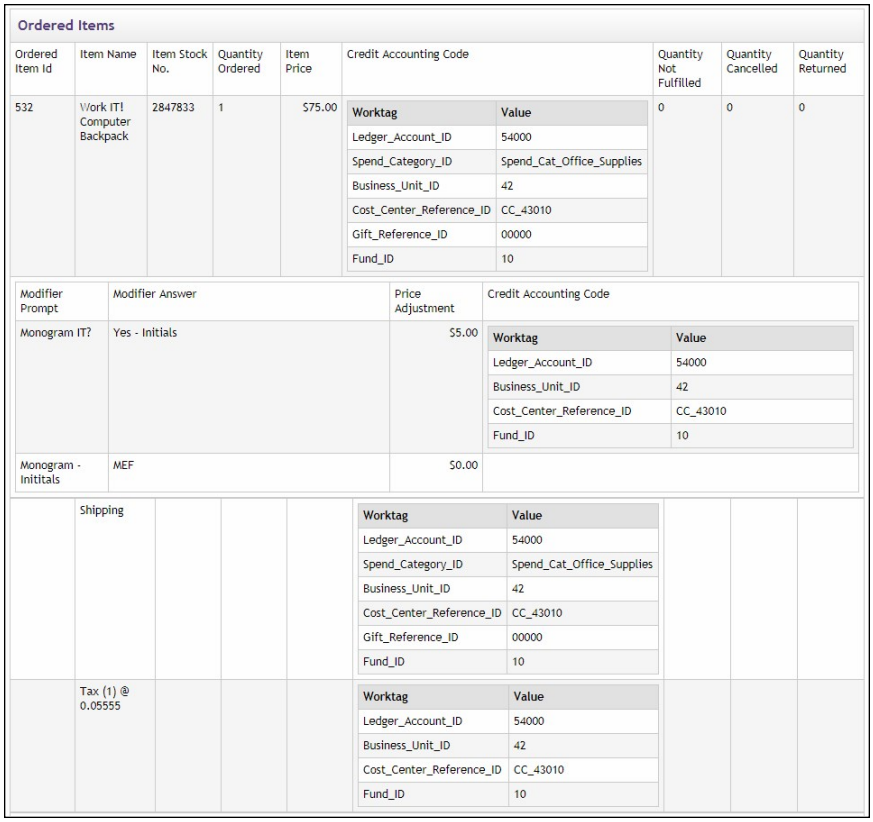
Note: If the campus web application passes an incomplete or incorrect value for the CREDIT_ACCT_CODE parameter, the transaction will still be accepted (provided the customer enters valid payment information); however, a GL exception will be generated. A uPay site manager should resolve any GL exceptions that result.

Important! The DEBIT_ACCT_CODE parameter cannot be passed to uPay when Workday general ledger integration is used. uPay sites will always pass the value configured in the uPay site's "Bank Account ID" field when reporting a value for Bank_Account_Reference to Workday.

17.7 Worktags in Order Search

The Worktags associated with an order are recorded in the Credit Accounting Code column for both store and uPay transactions. A separate breakdown for Worktags is shown for the item cost, product modifiers, shipping, and tax.

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Ordered Items

Ordered Item Id	Item Name	Item Stock No.	Quantity Ordered	Item Price	Credit Accounting Code	Quantity Not Fulfilled	Quantity Cancelled	Quantity Returned
532	Work IT! Computer Backpack	2847833	1	$75.00	Worktag: Value Ledger_Account_ID: 54000 Spend_Category_ID: Spend_Cat_Office_Supplies Business_Unit_ID: 42 Cost_Center_Reference_ID: CC_43010 Gift_Reference_ID: 00000 Fund_ID: 10	0	0	0

Modifier Prompt	Modifier Answer	Price Adjustment	Credit Accounting Code
Monogram IT?	Yes - Initials	$5.00	Worktag: Value Ledger_Account_ID: 54000 Business_Unit_ID: 42 Cost_Center_Reference_ID: CC_43010 Fund_ID: 10
Monogram - Inititals	MEF	$0.00	

	Shipping				Worktag: Value Ledger_Account_ID: 54000 Spend_Category_ID: Spend_Cat_Office_Supplies Business_Unit_ID: 42 Cost_Center_Reference_ID: CC_43010 Gift_Reference_ID: 00000 Fund_ID: 10			
	Tax (1) @ 0.05555				Worktag: Value Ledger_Account_ID: 54000 Business_Unit_ID: 42 Cost_Center_Reference_ID: CC_43010 Fund_ID: 10			

17.8 What to Expect in Workday

Once configuration for Workday has been completed in Marketplace, including turning on general ledger updates for one or more stores (or uPay sites), then various parameters and values are passed to the school's Workday system when each store order is fulfilled and when each uPay site transaction is processed.

The following section describes what Workday receives after a transaction takes place.

What Workday receives ...

When a transaction is completed, Marketplace sends transaction parameters and values to TouchNet Workday Connect, which in turns sends values to Workday's Cash_Management web service. The following information is submitted to the Ad hoc Bank Transaction business process in Workday:

- **Company_Reference**—This value comes from the Company field in the Marketplace Operations Center. For stores, the Company field is on the Store General Settings page. For uPay sites, this field is on the uPay Payment Settings page.

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- **Currency_Reference**—This value was configured during the implementation of Marketplace. It resides in a Marketplace property file in the TouchNet Data Center. This value indicates the currency type.
- **Bank_Account_Reference**—This value comes from the Bank Account field in the Marketplace Operations Center. For stores, the Bank Account field is on the Store General Settings page. For uPay sites, this field is on the uPay Payment Settings page.
- **Transaction_Amount**—The total amount of the transaction. (Positive line items are summed up separately from negative line items. The positive amount is posted as a Deposit. The negative amount if posted as a Withdrawal.) This amount equals the total of the Line_Amount fields. For each transaction, Marketplace sends a complete set of Ad_hoc_Bank_Transaction_Line_Data for each monetary amount. For example, tax amount, shipping cost amount, product modifier amount, and item amount are each sent as separate Line_Amount fields.
- **Transaction_Memo**—The field contains the TPG Reference ID, which can be used to identify the transaction in TouchNet Payment Gateway.
- **Deposit** or **Withdrawal**—All transactions are flagged as either Deposit (which is used for purchases) or Withdrawal (which is used for refunds).
- **Auto_Complete**—This value was configured during the implementation of Marketplace. It resides in a Marketplace property file in the TouchNet Data Center. This value can be either true or false. If set to true, the business process is automatically processed: approvals are automatically approved, reviews and to-do's are automatically by-passed, and notifications are automatically suppressed. The default value is false.

In addition, the following fields are sent as the Ad_hoc_Bank_Transaction_Line_Data. Multiple sets of this data may be sent for each monetary amount included in the transaction. For example, tax amount, shipping cost amount, product modifier amount, and item amount are each sent separately to Workday with their own values for the following fields.

- **Ledger_Account_ID**—This value comes from the Ledger_Account_ID field in the Worktags configured for the applicable Marketplace Accounting Code. All Marketplace accounting codes must include a Ledger_Account_ID value.
- **Account_Set_ID**—This value is provided by the school. It is configured in a Marketplace property file in the TouchNet Data Center during the implementation of Workday Connect.
- **Resource_Category_Reference**—This value comes from the Spend_Category_ID field in the Worktag configuration for the applicable Marketplace Accounting Code. Spend_Category_ID can be optionally

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added to Marketplace accounting codes. This value typically refers to an expense account.

- **Revenue_Category_Reference**—This value comes from the Revenue_Category_ID field in the Worktag configuration for the applicable Marketplace Accounting Code. Revenue_Category_ID can be optionally added to Marketplace accounting codes. This value typically classifies the item purchased.
- **Line_Amount**—This value represents one specific monetary amount that contributes to the Transaction_Amount total. Multiple sets of Ad_hoc_Bank_Transaction_Line_Data may be sent for each monetary amount included in the transaction. For example, tax amount, shipping cost amount, product modifier amount, and item amount are each sent separately to Workday.
- **Line_Memo**—This field contains an OrderId value, which is the Marketplace order ID for store transactions and the system tracking ID for uPay transactions. This field also contains a short description of the charge, such as ShipmentTaxClass (which represents the total tax for the item), FulfillmentItemId (which represents the base cost for the item), Shipping Cost, and ModifierId (which represents the cost of a product modifier).
- [Additional Worktags]—Any additional Worktags configured for the applicable Marketplace accounting code are also sent. The Worktags included may vary by Marketplace accounting code.

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Part 6:
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 Revenue by Payment Type Revenue by Attendant By Product Taxes User Roles Transaction Detail

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Report Submenu	Available Reports
Merchants	Merchant Revenue Report Revenue by Payment Type Revenue by Attendant Taxes User Roles Transaction Detail
Stores	Revenue by Payment Type [Store Revenue Report] By Product [Store Revenue Report] By Stock No. [Store Revenue Report] By Product Type [Store Revenue Report] By Attendant [Store Revenue Report] Totals Taxes Buyer Information Recurring Payments User Roles Transaction Detail
uPay Sites	Revenue Revenue by Payment Type By Product Recurring Payments Posting Status Posted Parameters GL Exceptions Transaction Detail

18.2 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 and time 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 also select the hour and minute.

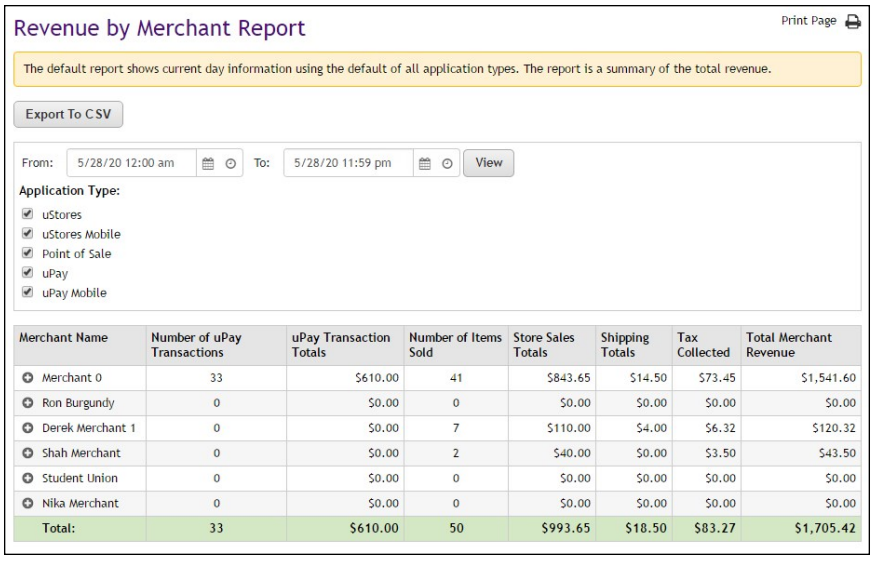
You can export—in CSV format—the activity displayed in Marketplace reports. Each report has an Export to CSV button. When you click this button, you'll be prompted to select a location for saving the CSV file.

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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

Print Page

The default report shows current day information using the default of all application types. The report is a summary of the total revenue.

Export To CSV

From: 5/28/20 12:00 am To: 5/28/20 11:59 pm View

Application Type:

- uStores
- uStores Mobile
- Point of Sale
- uPay
- uPay Mobile

Merchant Name	Number of uPay Transactions	uPay Transaction Totals	Number of Items Sold	Store Sales Totals	Shipping Totals	Tax Collected	Total Merchant Revenue
Merchant 0	33	$610.00	41	$843.65	$14.50	$73.45	$1,541.60
Ron Burgundy	0	$0.00	0	$0.00	$0.00	$0.00	$0.00
Derek Merchant 1	0	$0.00	7	$110.00	$4.00	$6.32	$120.32
Shah Merchant	0	$0.00	2	$40.00	$0.00	$3.50	$43.50
Student Union	0	$0.00	0	$0.00	$0.00	$0.00	$0.00
Nika Merchant	0	$0.00	0	$0.00	$0.00	$0.00	$0.00
Total:	33	$610.00	50	$993.65	$18.50	$83.27	$1,705.42

And here is the same report with one of the merchants expanded to show 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
Merchant 0	33	$610.00	41	$843.65	$14.50	$73.45	$1,541.60
Ron Burgundy	0	$0.00	0	$0.00	$0.00	$0.00	$0.00
Derek Merchant 1	0	$0.00	7	$110.00	$4.00	$6.32	$120.32

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	Derek Store 1	6	7	$110.00	$4.00	$114.00	$6.32	$120.32
25	Derek Store Single 1	0	0	$0.00	$0.00	$0.00	$0.00	$0.00
Total:		6	7	$110.00	$4.00	$114.00	$6.32	$120.32

uPay Revenue

Site ID	Site Name	Credit Card Transactions	Total Credit Card Transactions	TouchNet PayPath Transactions	Total TouchNet PayPath Transactions	Campus Card Transactions	Total Campus Card Transactions	ACH Transactions	Total ACH Transactions	Total Transactions	Total Revenue
3	Derek uPay Site	0	$0.00	0	$0.00	0	$0.00	0	$0.00	0	$0.00
Total:		0	$0.00	0	$0.00	0	$0.00	0	$0.00	0	$0.00

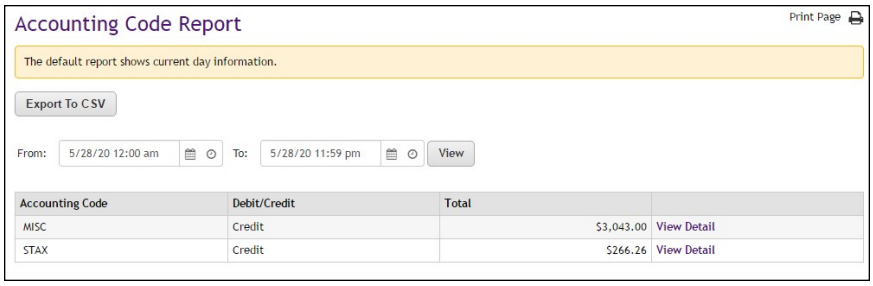
Shah Merchant	0	$0.00	2	$40.00	$0.00	$3.50	$43.50
Student Union	0	$0.00	0	$0.00	$0.00	$0.00	$0.00
Nika Merchant	0	$0.00	0	$0.00	$0.00	$0.00	$0.00
Total:	33	$610.00	50	$993.65	$18.50	$83.27	$1,705.42

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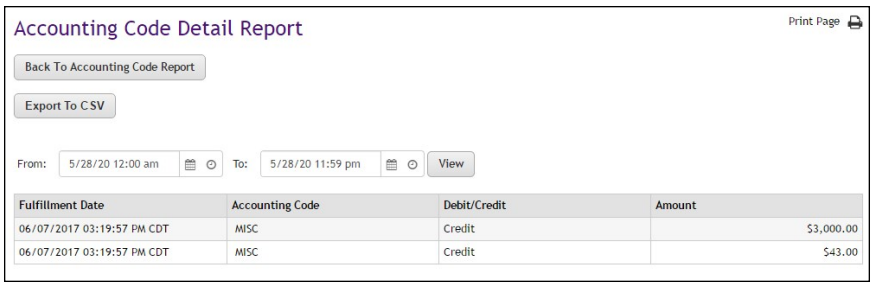
Revenue by Accounting Code

Administrators, chief administrators, and accountants can open the Accounting Code Report.

It shows a summary of activity by accounting code for all stores and uPay sites in your Marketplace system.



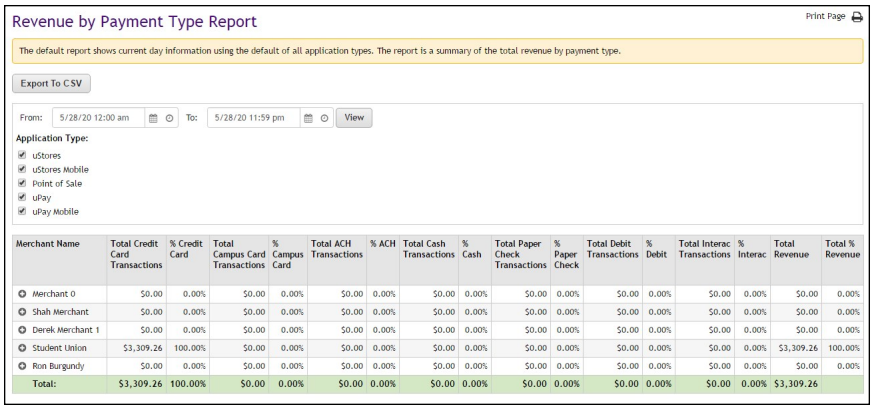
By clicking on the View Detail link for each accounting code, you can view a detailed list of all the transactions that use the specified accounting code.



Revenue by Payment Type Report

Administrators, chief administrators, and accountants can open the Revenue by Payment Type Report.

It shows a summary of activity by payment type for all merchants. Each payment type is represented by a revenue amount and a percentage of each merchant's total revenue.



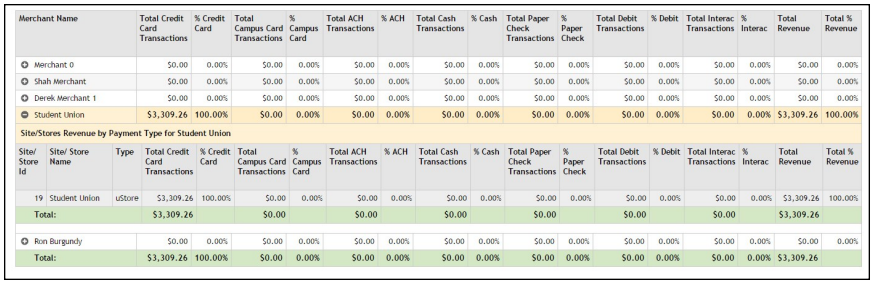
The following transaction types are displayed in this report:

- Credit Card

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- Campus Card
- ACH
- Invoice Me
- Departmental Charge
- Debit
- Interac

By clicking the + plus sign to the left of a merchant name, you can expand that merchant to show its stores and uPay sites.



Merchant Name	Total Credit Card Transactions	% Credit Card	Total Campus Card Transactions	% Campus Card	Total ACH Transactions	% ACH	Total Cash Transactions	% Cash	Total Paper Check Transactions	% Paper Check	Total Debit Transactions	% Debit	Total Interac Transactions	% Interac	Total Revenue	Total % Revenue
Merchant 0	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%
Shah Merchant	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%
Derek Merchant 1	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%
Student Union	$3,309.26	100.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$3,309.26	100.00%

Site/Stores Revenue by Payment Type for Student Union

Site/ Store Id	Site/ Store Name	Type	Total Credit Card Transactions	% Credit Card	Total Campus Card Transactions	% Campus Card	Total ACH Transactions	% ACH	Total Cash Transactions	% Cash	Total Paper Check Transactions	% Paper Check	Total Debit Transactions	% Debit	Total Interac Transactions	% Interac	Total Revenue	Total % Revenue
19	Student Union	uStore	$3,309.26	100.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$3,309.26	100.00%
Total:			$3,309.26		$0.00		$0.00		$0.00		$0.00		$0.00		$0.00		$3,309.26	

Ron Burgundy	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%
Total:	$3,309.26	100.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$3,309.26	

Important! We strongly recommend you limit the search criteria to a fairly restricted time period. The longer the time period, the greater the data, and large amounts of data may cause the report generation process to time out.

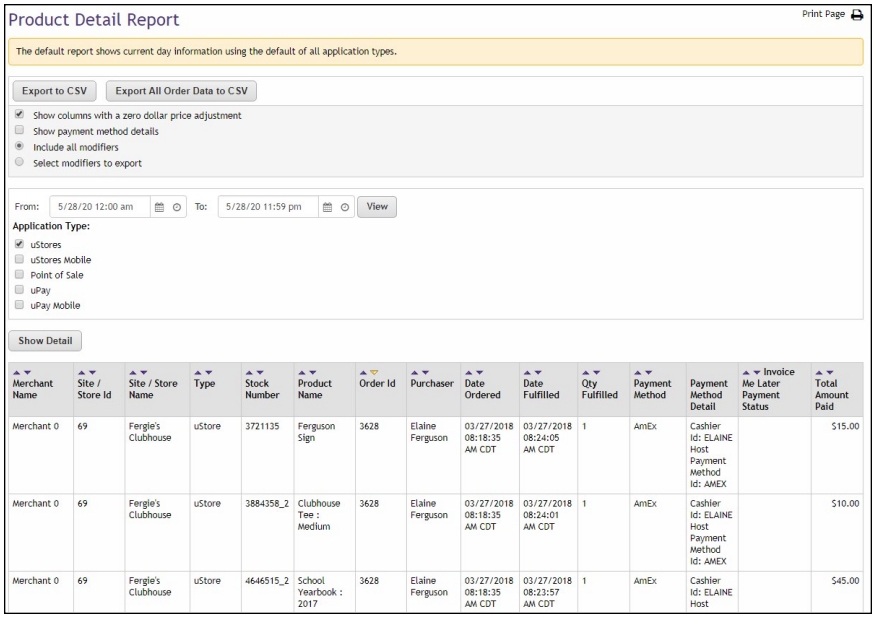
Product Detail Report

Administrators, chief administrators, and accountants can open the Product Detail Report. This report shows transactions for a specified date/time range. The transactions can be filtered with the Application Type checkboxes to display the transactions for any combination of the applications, including uStores, uStores Mobile, Point-of-Sale, uPay, and uPay Mobile.

Additional checkboxes allow the user to show/hide optional information, such as modifiers and zero dollar price adjustments.

For each transaction, the report includes merchant name, site/store ID, site/store name, application type, stock number, product name, order ID, purchaser name, date ordered, date fulfilled, quantity fulfilled, payment method, payment method detail, and total amount paid.

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By clicking Show Detail button, you can make the display expand to show Shipping Information fields for store transactions. Product modifiers and buyer modifiers (also known as "user modifiers") are also displayed.

For both store transactions and uPay transactions, the e-mail address for the customer and the Email Status field is included. The latter field says Success or Failure depending on the response received when Marketplace attempted to send an e-mail confirmation message to the customer.

The report information can be exported in CSV format. Plus, an "Export All Order Data to CSV" button allows all data associated with the transactions to be exported: this data includes not just the displayed information but all data that Marketplace saves for the orders.

The following data is exported when the "Export to CSV" button is selected: "Merchant Name","Site / Store Id","Site / Store Name","Type","Stock Number","Product Name","Order Id","Terminal Id","Purchaser","Date Ordered","Date Fulfilled","Qty Fulfilled","Payment Method","Invoice Me LaterPayment Status","Product Price","Total Amount Paid","StreetAddress1","City","State","PostalCode","Country","Email Address","Email Status","Text Msg Number","Text Msg Status"

The following additional data is exported when the "Export All Order Data to CSV" button is selected: "Day Phone Number","Night Phone Number","Mobile Phone Number","Tracking Number","Card # (last 4)","TPG Ref #","CC Auth Code","External Transaction Id","Linked Session Id".

In addition, when the Show Detail button is selected before the Export button, then all product modifiers are included in the CSV file. Each modifier is represented in a separate column.

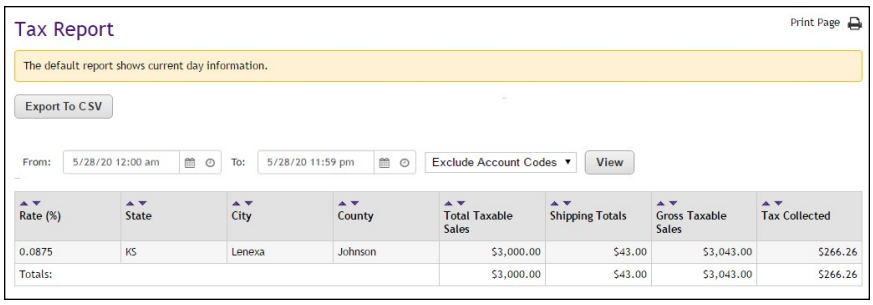
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Important! We strongly recommend you limit the search criteria to a fairly restricted time period. The longer the time period, the greater the data, and large amounts of data may cause the report generation process to time out.

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.

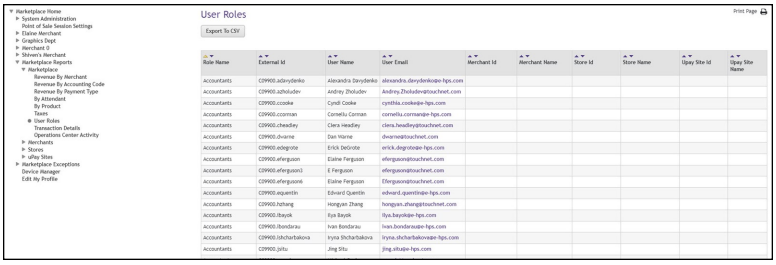


You can use the Include/Exclude Account Codes dropdown menu to determine whether the Accounting Code column will be displayed.

User Roles Report

Administrators, chief administrators, and accountants can open the User Roles Report.

This report shows a list of all assigned user roles—chief administrators, administrators, accountants, merchant managers, store managers, store clerks, fulfillers, uPay site managers, attendants, etc.



The report is initially sorted by Role Name (the far left column); however, you can select the arrows in the column headers to choose a different sorting method.

You can also see the email address setup for each user. When the report is viewed in the Operations Center the email address will be a hyperlink that can be clicked to trigger an email message (based upon your computer's configuration). When downloaded to a .CSV file the report will contain email addresses that can be gathered for email or other uses.

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You can export this report in CSV format.

Transaction Detail Report - Marketplace

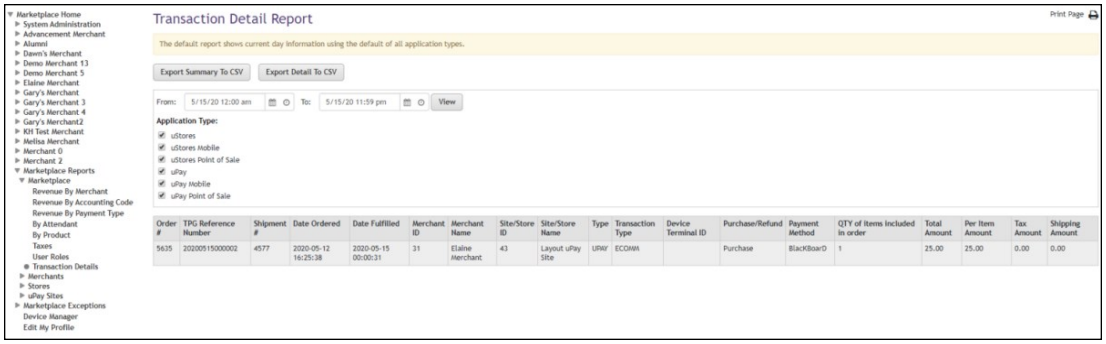
The Transaction Detail report contains all available order, shipping, and fulfillment information for the selected date and time range. This report is available for uStores, uPay, and Marketplace Point-of-Sale.

Users with the Chief Administrator, Administrator, and Accountant roles have access to view the Transaction Detail report.

A summary view of the report displays initially within the Marketplace Operations Center. You can export the report data in CSV format to view a detailed view of the report data. To view the detailed report data, click on the Export Detail To CSV button. The Transaction Detail Report is available for Marketplace Administration, Merchants, Stores, uPay Sites.

You can also select the desired Application Type for the report. By default all the available application types are selected, but you can click on the checkbox to exclude an application type from your report data.

For each transaction, the summary report includes: Order #, TPG Reference Number, Shipment #, Date Ordered, Date Fulfilled, Merchant ID and Name, Site/Store ID and Name, Application Type, Transaction Type, Device Terminal ID (if applicable), Purchase or Refund, Quantity of Items in Order, Total Amount, Per Item Amount, Tax Amount, Shipping Amount.



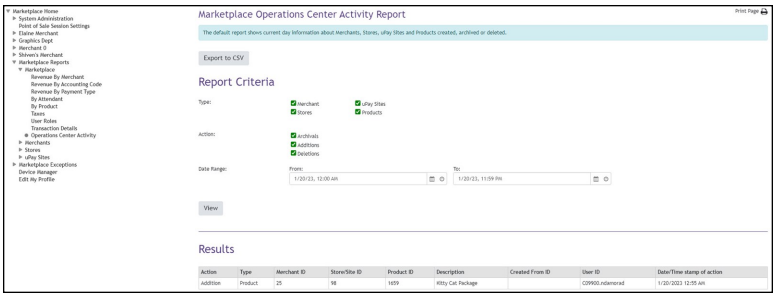
The Transaction Detail Report

Ops Center Activity Report - Marketplace

The Marketplace Operations Center Activity Report allows the user to select a date range, type of activity they would like to search on (Merchants, Stores, uPay Sites and/or Products) and the action they would like to search on (additions, archivals or deletions).

The Marketplace level report will show actions for all merchants, Stores, uPay Sites and Products.

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The resulting output will display information about what was added, archived or deleted, by whom and when for auditing and research purposes.

Note: Data will be available from Marketplace Feature Pack 8 Version 5 implementation through current day. Data for additional events prior to Marketplace Feature Pack 8 Version 5 will also be available, but archival and deletion data may not be available or complete.

18.3 Merchant Reports

Several reports are available that summarize Marketplace commerce activity for merchant managers.

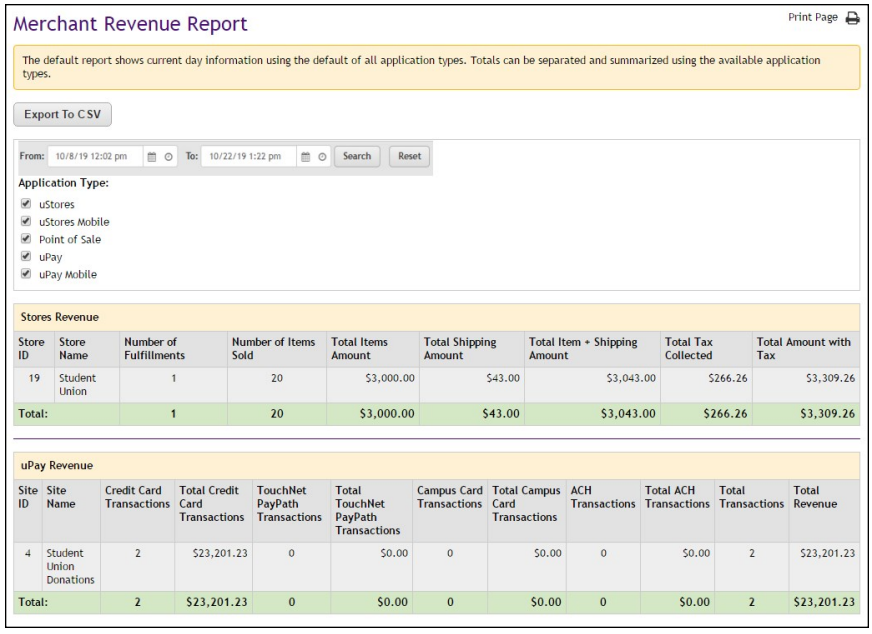
You can customize each report by changing the date and time criteria. To search by a specific date range, enter a new start date and end date. You can either enter the date that you desire or use the calendar button to select a date. If you enter a new start or end in the date fields, be sure to enter the dates in mm/dd/yy format. You can also select the hour and minute.

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.

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Merchant Revenue Report

Print Page

The default report shows current day information using the default of all application types. Totals can be separated and summarized using the available application types.

Export To CSV

From: 10/8/19 12:02 pm To: 10/22/19 1:22 pm Search Reset

Application Type:

- uStores
- uStores Mobile
- Point of Sale
- uPay
- uPay Mobile

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
19	Student Union	1	20	$3,000.00	$43.00	$3,043.00	$266.26	$3,309.26
Total:		1	20	$3,000.00	$43.00	$3,043.00	$266.26	$3,309.26

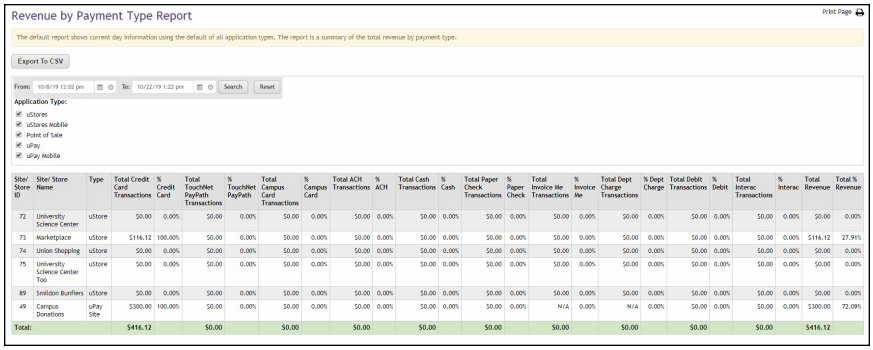
uPay Revenue

Site ID	Site Name	Credit Card Transactions	Total Credit Card Transactions	TouchNet PayPath Transactions	Total TouchNet PayPath Transactions	Campus Card Transactions	Total Campus Card Transactions	ACH Transactions	Total ACH Transactions	Total Transactions	Total Revenue
4	Student Union Donations	2	$23,201.23	0	$0.00	0	$0.00	0	$0.00	2	$23,201.23
Total:		2	$23,201.23	0	$0.00	0	$0.00	0	$0.00	2	$23,201.23

Revenue by Payment Type Report

Merchant managers can open the Revenue by Payment Type Report.

It shows a summary of activity by payment type for all stores and uPay sites for this merchant. Each payment type is represented by a revenue amount and a percentage of each merchant's total revenue.



Revenue by Payment Type Report

Print Page

The default report shows current day information using the default of all application types. The report is a summary of the total revenue by payment type.

Export To CSV

From: 10/8/19 12:02 pm To: 10/22/19 1:22 pm Search Reset

Application Type:

- uStores
- uStores Mobile
- Point of Sale
- uPay
- uPay Mobile

Site/ Store ID	Site/ Store Name	Type	Total Credit Card Transactions	% Credit Card	Total TouchNet PayPath Transactions	% TouchNet PayPath	Total Campus Card Transactions	% Campus Card	Total ACH Transactions	% ACH	Total Cash Transactions	% Cash	Total Paper Check Transactions	% Paper Check	Total Invoice Me Transactions	% Invoice Me	Total Dept Charge Transactions	% Dept Charge	Total Debit Transactions	% Debit	Total Interac Transactions	% Interac	Total Revenue	Total % Revenue
72	University Science Center	uStore	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%
73	Marketplace	uStore	$116.12	100.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$116.12	27.91%
74	Union Shopping	uStore	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%
75	University Science Center Too	uStore	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%
89	Smildon Bunfiers	uStore	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%
49	Campus Donations	uPay Site	$300.00	100.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%	N/A	0.00%	N/A	0.00%	$0.00	0.00%	$0.00	0.00%	$300.00	72.09%
Total:			$416.12		$0.00		$0.00		$0.00		$0.00		$0.00		$0.00		$0.00		$0.00		$0.00		$416.12	

The following transaction types are displayed in this report:

- Credit Card
- Campus Card
- ACH
- Invoice Me
- Departmental Charge
- Debit
- Interac

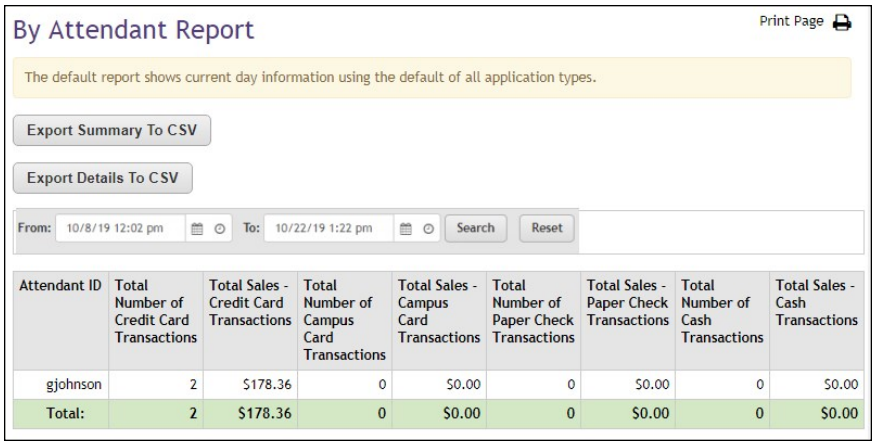
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Important! We strongly recommend you limit the search criteria to a fairly restricted time period. The longer the time period, the greater the data, and large amounts of data may cause the report generation process to time out.

Revenue by Attendant

Merchant managers can open the By Attendant Report.

It shows a summary of activity by attendants for all stores for this merchant.

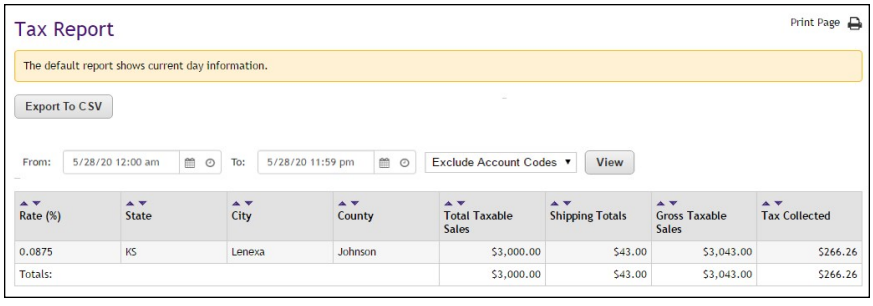


Attendant ID	Total Number of Credit Card Transactions	Total Sales - Credit Card Transactions	Total Number of Campus Card Transactions	Total Sales - Campus Card Transactions	Total Number of Paper Check Transactions	Total Sales - Paper Check Transactions	Total Number of Cash Transactions	Total Sales - Cash Transactions
gjohnson	2	$178.36	0	$0.00	0	$0.00	0	$0.00
Total:	**2**	**$178.36**	**0**	**$0.00**	**0**	**$0.00**	**0**	**$0.00**

This report contains a separate line for each attendant, and on that line, the report adds all store transactions that the attendant processed.

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.



Rate (%)	State	City	County	Total Taxable Sales	Shipping Totals	Gross Taxable Sales	Tax Collected
0.0875	KS	Lenexa	Johnson	$3,000.00	$43.00	$3,043.00	$266.26
Totals:				$3,000.00	$43.00	$3,043.00	$266.26

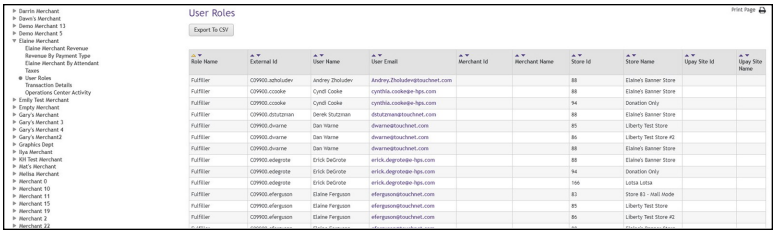
You can use the Include/Exclude Account Codes dropdown menu to determine whether the Accounting Code column will be displayed.

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User Roles Report

Merchant managers can open the User Roles Report.

This report shows a list of all assigned user roles for this merchant—merchant managers, store managers, uPay site managers, store clerks, store accountants, Point-of-Sale attendants, fulfillers, payment clerks, and site accountants.



The report is initially sorted by Role Name (the far left column); however, you can select the arrows in the column headers to choose a different sorting method.

You can also see the email address setup for each user. When the report is viewed in the Operations Center the email address will be a hyperlink that can be clicked to trigger an email message (based upon your computer's configuration). When downloaded to a .CSV file the report will contain email addresses that can be gathered for email or other uses.

You can export this report in CSV format.

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Transaction Detail Report - Merchants

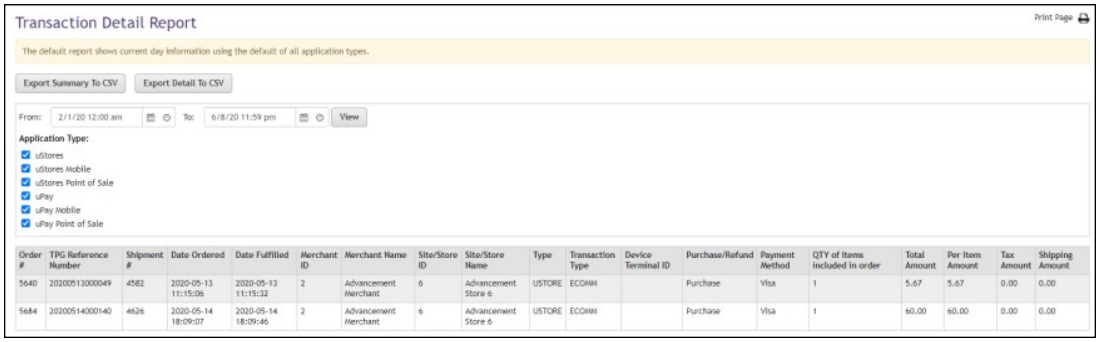
The Transaction Detail report contains all available order, shipping, and fulfillment information for the selected date and time range. This report is available for uStores, uPay, and Marketplace Point-of-Sale.

Users with the Merchant Manager role have access to view the Transaction Detail report.

A summary view of the report displays initially within the Marketplace Operations Center. You can export the report data in CSV format to view a detailed view of the report data. To view the detailed report data, click on the Export Detail To CSV button. The Transaction Detail Report is available for Marketplace Administration, Merchants, Stores, uPay Sites.

You can also select the desired Application Type for the report. By default all the available application types are selected, but you can click on the checkbox to exclude an application type from your report data.

For each transaction, the summary report includes: Order #, TPG Reference Number, Shipment #, Date Ordered, Date Fulfilled, Merchant ID and Name, Site/Store ID and Name, Application Type, Transaction Type, Device Terminal ID (if applicable), Purchase or Refund, Quantity of Items in Order, Total Amount, Per Item Amount, Tax Amount, Shipping Amount.



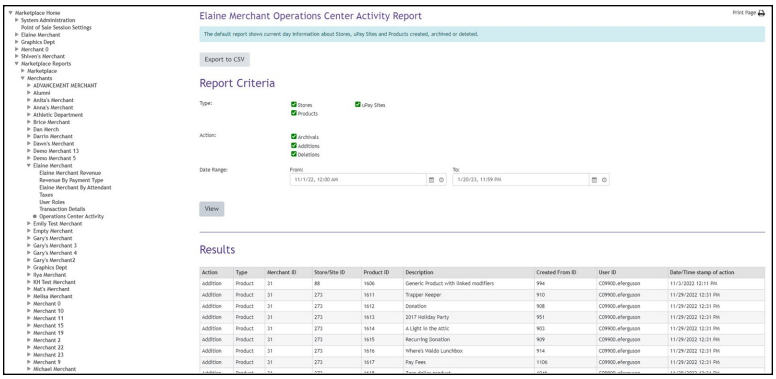
The Transaction Detail Report

Operations Center Activity Report - Merchants

The Merchant Operations Center Activity Report allows the user to select a date range, type of activity they would like to search on (Stores, uPay Sites and/or Products) and the action they would like to search on (additions, archivals or deletions).

The Merchant level report will show actions for Stores, uPay Sites and Products associated with that merchant alone.

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The resulting output will display information about what was added, archived or deleted, by whom and when for auditing and research purposes.

Note: Data will be available from Marketplace Feature Pack 8 Version 5 implementation through current day. Data for additional events prior to Marketplace Feature Pack 8 Version 5 will also be available, but archival and deletion data may not be available or complete.

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18.4 Store Reports

Several reports are available that summarize Marketplace commerce activity for merchant managers, store managers, 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 also select the hour and minute.

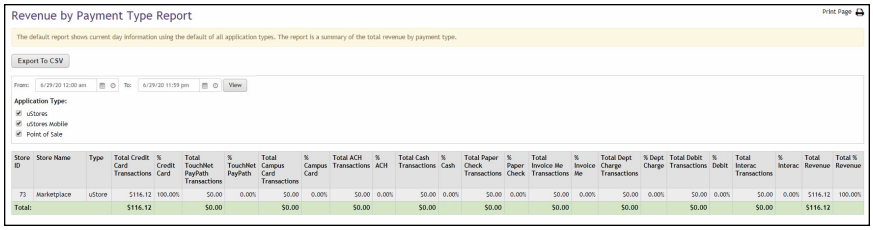
You can export—in CSV format—the activity displayed in Marketplace reports. Each report has an Export to CSV button. When you click this button, you'll be prompted to select a location for saving the CSV file.

Revenue by Payment Type Report

Merhant managers, store managers, and store accounts can open the Revenue by Payment Type Report.

It shows a summary of activity by payment type for an individual store. Each payment type is represented by a revenue amount and a percentage of each atore's total revenue.

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The following transaction types are displayed in this report:

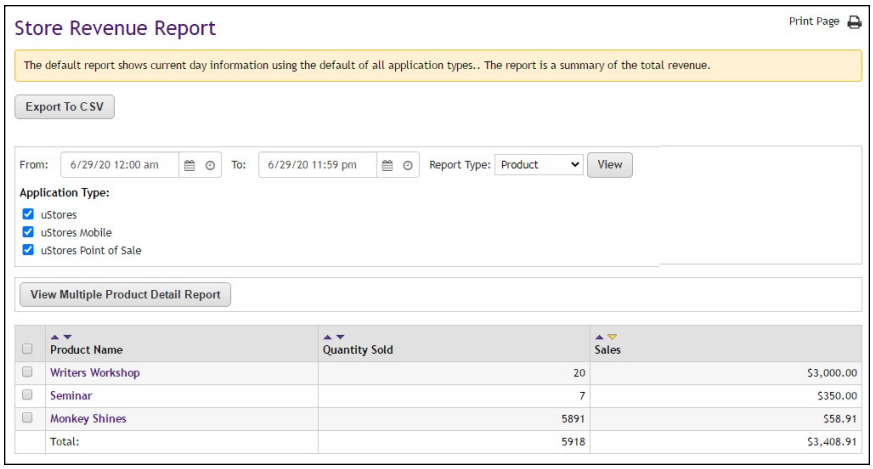
- Credit Card
- Campus Card
- ACH
- Invoice Me
- Departmental Charge
- Debit
- Interac

Important! We strongly recommend you limit the search criteria to a fairly restricted time period. The longer the time period, the greater the data, and large amounts of data may cause the report generation process to time out.

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.



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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.

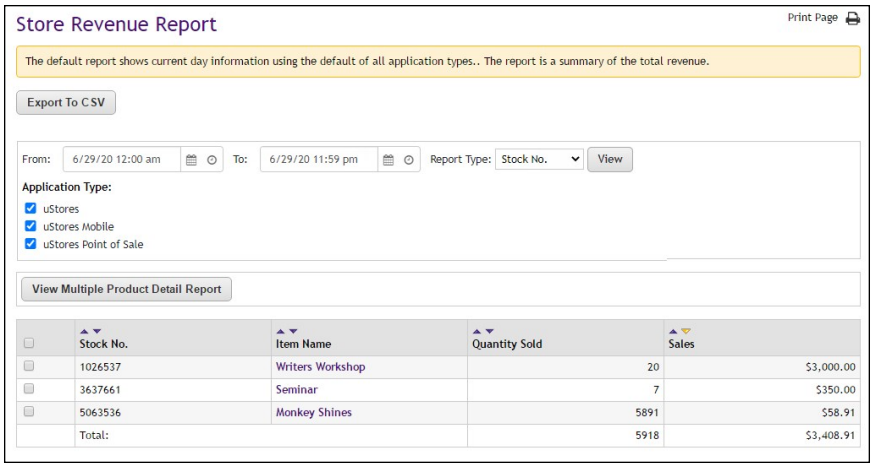
You can display the Product Detail Report for each product separately, or you can display the Product Detail Report for multiple products at the same time. To display the Product Detail Report for multiple products, select the corresponding checkbox for each product that you would like to view. Then, select the View Multiple Product Detail Report button.

For examples of the Product Detail Report, see **"Product Detail Report" on page 741**.

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.



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.

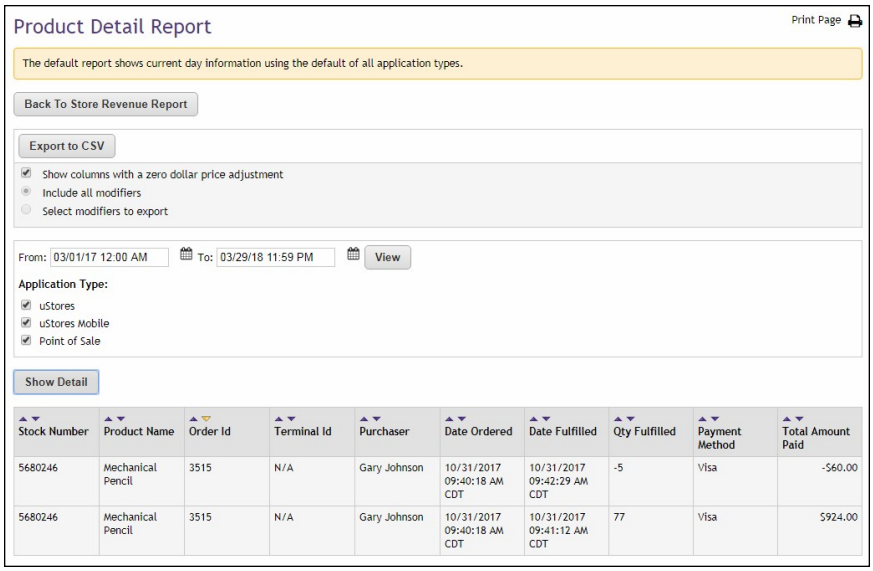
You can display the Product Detail Report for each product separately, or you can display the Product Detail Report for multiple products at the same time. To display the Product Detail Report for multiple products, select the corresponding checkbox for each product that you would like to view. Then, select the View Multiple Product Detail Report button.

For examples of the Product Detail Report, see **"Product Detail Report" on page 741**.

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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.



The Product Detail Report without product modifiers displayed.



A Product Detail Report with modifiers displayed for an order.

When you select the Export to CSV button, the following information is exported: "Stock Number","Product Name","Order Id","Terminal Id","Purchaser","Date Ordered","Date Fulfilled","Qty Fulfilled","Payment Method","Product Price","Total Amount Paid","Email Address","Email Status","Tracking Number","Card # (last 4)","TPG Ref #","CC Auth Code".

If the Show Detail button is selected when you select the Export to CSV button, then all the product modifiers are also exported. Each modifier appears in its own column.

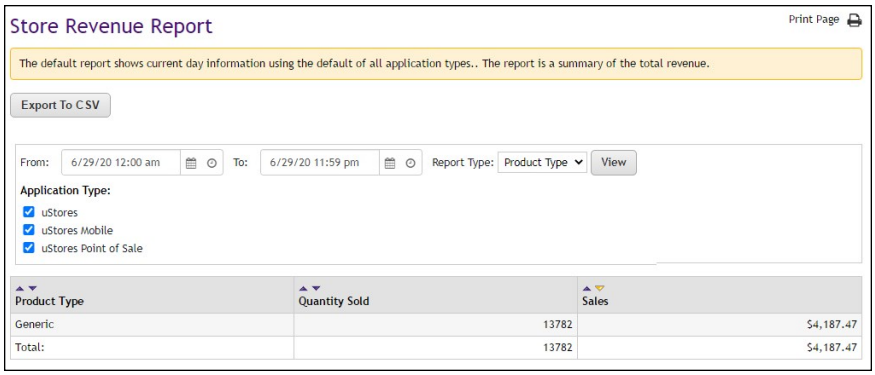
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Departmental Charge

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 635**.

Store Revenue Report by Product Type

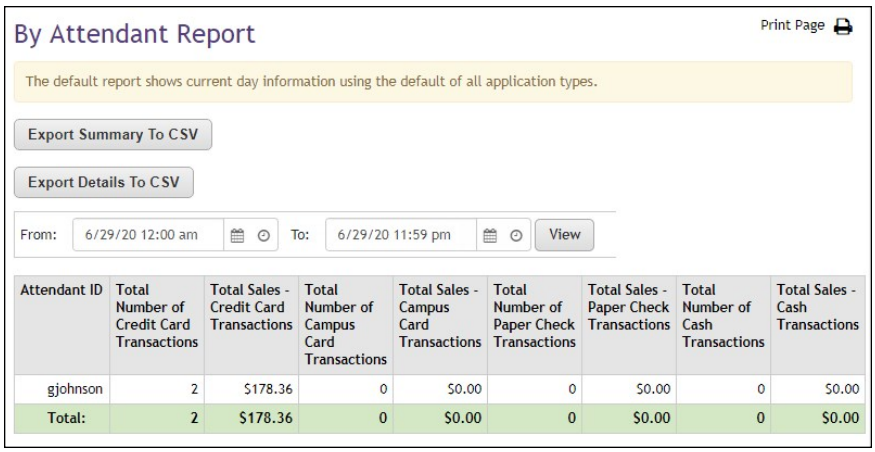
The Store Revenue Report by Product Type shows the total amount paid and the number sold for each product type. The following three product types are displayed: donation, digital, and generic.



Revenue by Attendant

Store managers, merchant managers, and store accountants can open the By Attendant Report.

It shows a summary of activity by attendants for all attendants that used the selected store.

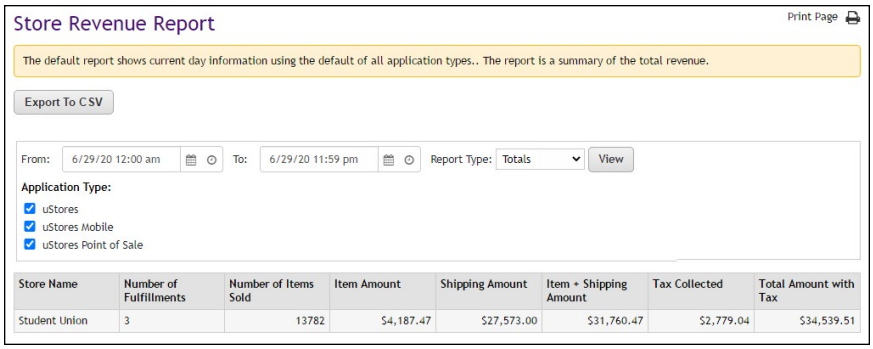


This report adds together all store transactions for which each attendant has access.

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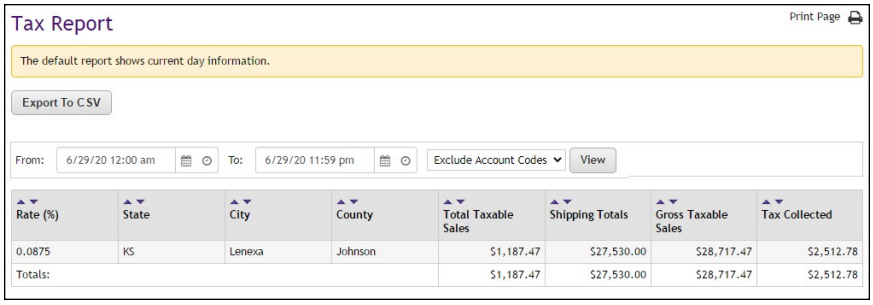
Store Revenue Report by Totals

The Store Revenue Report by Totals shows total amounts collected for fulfillments and items sold.



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.



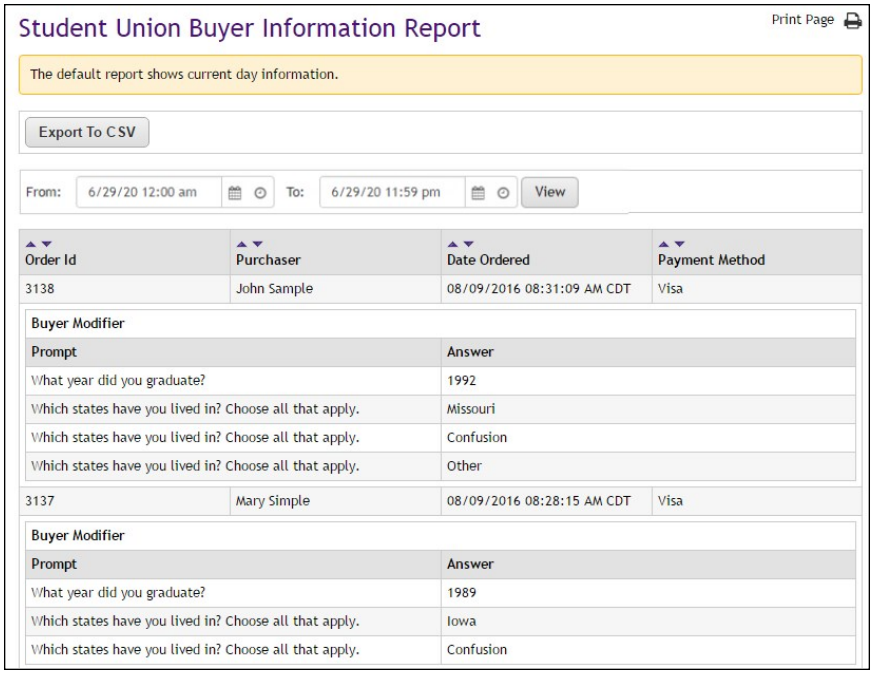
You can use the Include/Exclude Account Codes dropdown menu to determine whether the Accounting Code column will be displayed.

Buyer Information Report

The Buyer Information Report shows the user modifier selections made by each customer. (For information about how to configure user modifiers, see **"User Modifiers (Buyer Info)" on page 257**.)

For each order, the Order ID, Purchase, Date Ordered, and Payment Method are listed, followed immediately by a Buyer Modifier table. In this table, the prompt for each buyer modifier (also known as "user modifier") is listed, along with the answer chosen (or entered) by the customer.

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Student Union Buyer Information Report

Print Page

The default report shows current day information.

Export To CSV

From: 6/29/20 12:00 am To: 6/29/20 11:59 pm View

Order Id	Purchaser	Date Ordered	Payment Method
3138	John Sample	08/09/2016 08:31:09 AM CDT	Visa

Buyer Modifier

Prompt	Answer
What year did you graduate?	1992
Which states have you lived in? Choose all that apply.	Missouri
Which states have you lived in? Choose all that apply.	Confusion
Which states have you lived in? Choose all that apply.	Other

3137	Mary Simple	08/09/2016 08:28:15 AM CDT	Visa

Buyer Modifier

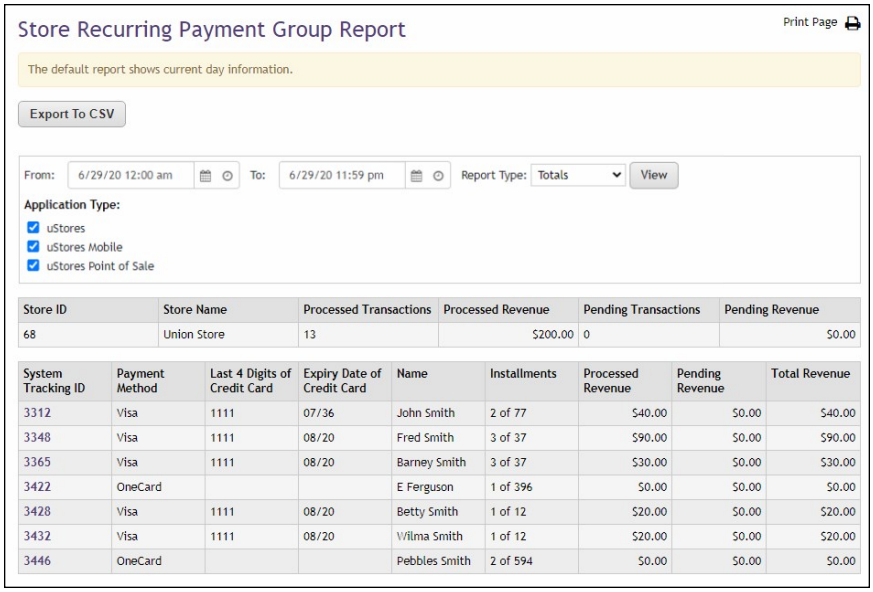
Prompt	Answer
What year did you graduate?	1989
Which states have you lived in? Choose all that apply.	Iowa
Which states have you lived in? Choose all that apply.	Confusion

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 "2 of 77," this means two recurring payments were processed during the selected date range, and the recurring payment schedule includes a total of 77 payments.

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Store Recurring Payment Group Report

Print Page

The default report shows current day information.

Export To CSV

From: 6/29/20 12:00 am To: 6/29/20 11:59 pm Report Type: Totals View

Application Type:

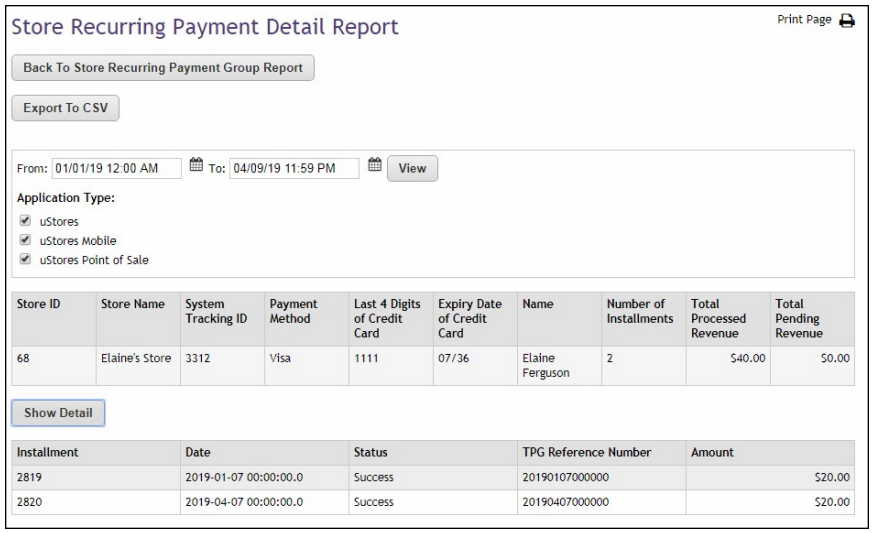
- uStores
- uStores Mobile
- uStores Point of Sale

Store ID	Store Name	Processed Transactions	Processed Revenue	Pending Transactions	Pending Revenue
68	Union Store	13	$200.00	0	$0.00

System Tracking ID	Payment Method	Last 4 Digits of Credit Card	Expiry Date of Credit Card	Name	Installments	Processed Revenue	Pending Revenue	Total Revenue
3312	Visa	1111	07/36	John Smith	2 of 77	$40.00	$0.00	$40.00
3348	Visa	1111	08/20	Fred Smith	3 of 37	$90.00	$0.00	$90.00
3365	Visa	1111	08/20	Barney Smith	3 of 37	$30.00	$0.00	$30.00
3422	OneCard			E Ferguson	1 of 396	$0.00	$0.00	$0.00
3428	Visa	1111	08/20	Betty Smith	1 of 12	$20.00	$0.00	$20.00
3432	Visa	1111	08/20	Wilma Smith	1 of 12	$20.00	$0.00	$20.00
3446	OneCard			Pebbles Smith	2 of 594	$0.00	$0.00	$0.00

The last four digits of the payment card can also be viewed, as well as the payment cards' expiration date and the customer name.

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

Print Page

Back To Store Recurring Payment Group Report

Export To CSV

From: 01/01/19 12:00 AM To: 04/09/19 11:59 PM View

Application Type:

- uStores
- uStores Mobile
- uStores Point of Sale

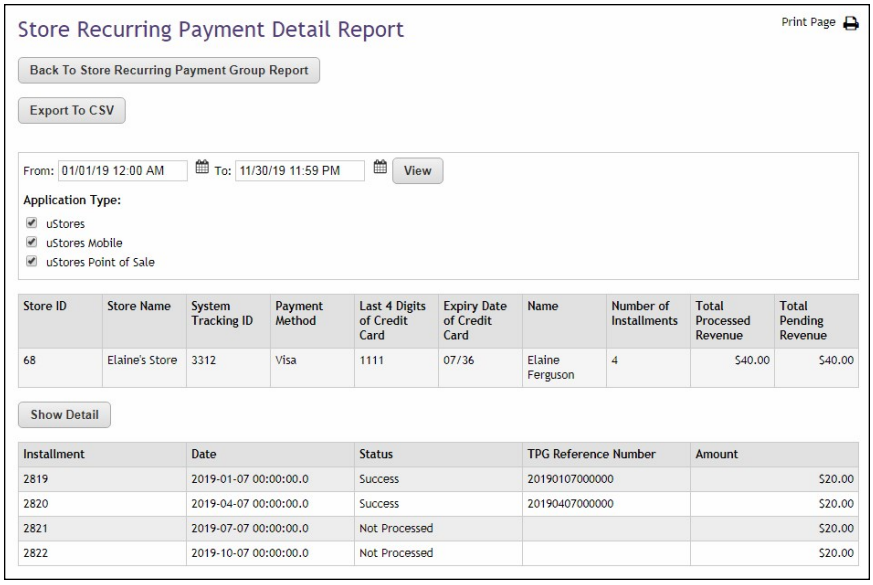
Store ID	Store Name	System Tracking ID	Payment Method	Last 4 Digits of Credit Card	Expiry Date of Credit Card	Name	Number of Installments	Total Processed Revenue	Total Pending Revenue
68	Elaine's Store	3312	Visa	1111	07/36	Elaine Ferguson	2	$40.00	$0.00

Show Detail

Installment	Date	Status	TPG Reference Number	Amount
2819	2019-01-07 00:00:00.0	Success	20190107000000	$20.00
2820	2019-04-07 00:00:00.0	Success	20190407000000	$20.00

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").

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Store Recurring Payment Detail Report

Print Page

Back To Store Recurring Payment Group Report

Export To CSV

From: 01/01/19 12:00 AM To: 11/30/19 11:59 PM View

Application Type:

- uStores
- uStores Mobile
- uStores Point of Sale

Store ID	Store Name	System Tracking ID	Payment Method	Last 4 Digits of Credit Card	Expiry Date of Credit Card	Name	Number of Installments	Total Processed Revenue	Total Pending Revenue
68	Elaine's Store	3312	Visa	1111	07/36	Elaine Ferguson	4	$40.00	$40.00

Show Detail

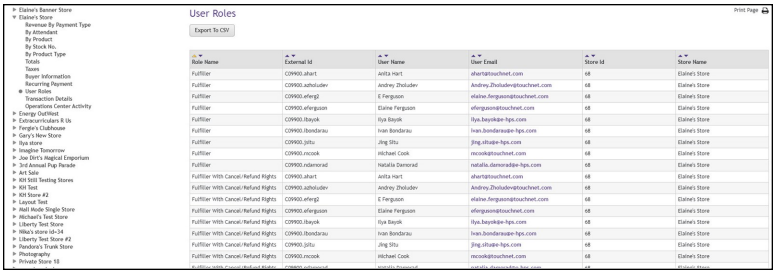
Installment	Date	Status	TPG Reference Number	Amount
2819	2019-01-07 00:00:00.0	Success	20190107000000	$20.00
2820	2019-04-07 00:00:00.0	Success	20190407000000	$20.00
2821	2019-07-07 00:00:00.0	Not Processed		$20.00
2822	2019-10-07 00:00:00.0	Not Processed		$20.00

In this case, assume the above screen shot was captured on 4/9/2019. Therefore, installments 2819 and 2820 were processed on 2019-01-07 and 2019--04-07 and show a status of "Success," while installments 2821 through 2822 are scheduled for future dates and show a status of "Not Processed."

User Roles Report

Merchant managers and store managers can open the User Roles Report.

This report shows a list of all assigned user roles for this store — store managers, store clerks, store accountants, Point-of-Sale attendants, and fulfillers.



User Roles

Export To CSV

Print Page

Role Name	External Id	User Name	User Email	Store Id	Store Name
Fulfiller	C09900.ahart	Anita Hart	ahart@touchnet.com	68	Elaine's Store
Fulfiller	C09900.azholudev	Andrey Zholudev	Andrey.Zholudev@touchnet.com	68	Elaine's Store
Fulfiller	C09900.eferg2	E Ferguson	elaine.ferguson@touchnet.com	68	Elaine's Store
Fulfiller	C09900.eferguson	Elaine Ferguson	eferguson@touchnet.com	68	Elaine's Store
Fulfiller	C09900.ibayok	Ilya Bayok	Ilya.bayok@e-hps.com	68	Elaine's Store
Fulfiller	C09900.ibondarau	Ivan Bondarau	Ivan.bondarau@e-hps.com	68	Elaine's Store
Fulfiller	C09900.jsitu	Jing Situ	jing.situ@e-hps.com	68	Elaine's Store
Fulfiller	C09900.mcook	Michael Cook	mcook@touchnet.com	68	Elaine's Store
Fulfiller	C09900.ndamorad	Natalia Damorad	natalia.damorad@e-hps.com	68	Elaine's Store
Fulfiller With Cancel/Refund Rights	C09900.ahart	Anita Hart	ahart@touchnet.com	68	Elaine's Store
Fulfiller With Cancel/Refund Rights	C09900.azholudev	Andrey Zholudev	Andrey.Zholudev@touchnet.com	68	Elaine's Store
Fulfiller With Cancel/Refund Rights	C09900.eferg2	E Ferguson	elaine.ferguson@touchnet.com	68	Elaine's Store
Fulfiller With Cancel/Refund Rights	C09900.eferguson	Elaine Ferguson	eferguson@touchnet.com	68	Elaine's Store
Fulfiller With Cancel/Refund Rights	C09900.ibayok	Ilya Bayok	Ilya.bayok@e-hps.com	68	Elaine's Store
Fulfiller With Cancel/Refund Rights	C09900.ibondarau	Ivan Bondarau	Ivan.bondarau@e-hps.com	68	Elaine's Store
Fulfiller With Cancel/Refund Rights	C09900.jsitu	Jing Situ	jing.situ@e-hps.com	68	Elaine's Store
Fulfiller With Cancel/Refund Rights	C09900.mcook	Michael Cook	mcook@touchnet.com	68	Elaine's Store

The report is initially sorted by Role Name (the far left column); however, you can select the arrows in the column headers to choose a different sorting method.

You can also see the email address setup for each user. When the report is viewed in the Operations Center the email address will be a hyperlink that can be clicked to trigger an email message (based upon your computer's configuration). When downloaded to a .CSV file the report will contain email addresses that can be gathered for email or other uses.

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You can export this report in CSV format.

Transaction Detail Report - Stores

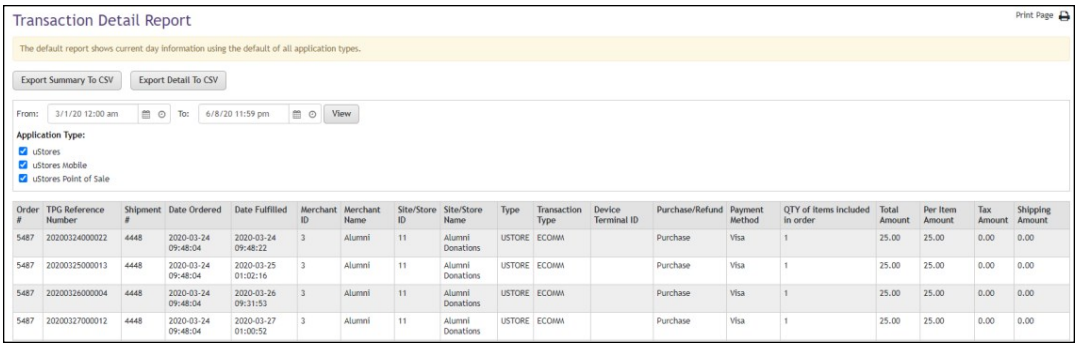
The Transaction Detail report contains all available order, shipping, and fulfillment information for the selected date and time range. This report is available for uStores, uPay, and Marketplace Point-of-Sale.

Users with the Store Manager and Store Accountant roles have access to view the Transaction Detail report.

A summary view of the report displays initially within the Marketplace Operations Center. You can export the report data in CSV format to view a detailed view of the report data. To view the detailed report data, click on the Export Detail To CSV button. The Transaction Detail Report is available for Marketplace Administration, Merchants, Stores, uPay Sites.

You can also select the desired Application Type for the report. By default all the available application types are selected, but you can click on the checkbox to exclude an application type from your report data.

For each transaction, the summary report includes: Order #, TPG Reference Number, Shipment #, Date Ordered, Date Fulfilled, Merchant ID and Name, Site/Store ID and Name, Application Type, Transaction Type, Device Terminal ID (if applicable), Purchase or Refund, Quantity of Items in Order, Total Amount, Per Item Amount, Tax Amount, Shipping Amount.

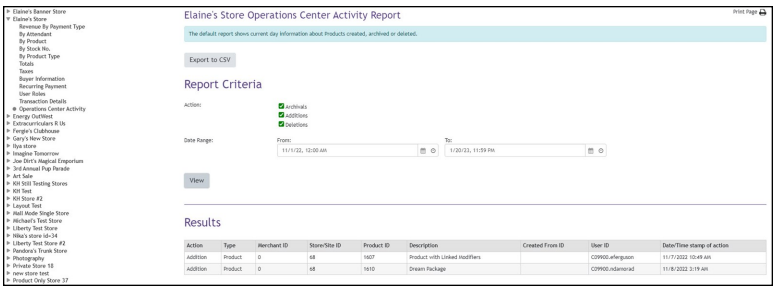


The Transaction Detail Report

Operations Center Activity Report - uStores

The uStores Operations Center Activity Report allows the user to select a date range and the action they would like to search on (additions, archivals or deletions).

The uStores level report will only show actions Products within that uStore.



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The resulting output will display information about what was added, archived or deleted, by whom and when for auditing and research purposes.

Note: Data will be available from Marketplace Feature Pack 8 Version 5 implementation through current day. Data for additional events prior to Marketplace Feature Pack 8 Version 5 will also be available, but archival and deletion data may not be available or complete.

.

18.5 uPay Site Reports

Several reports are available that summarize Marketplace commerce activity for merchant managers, uPay site managers, 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 also select the hour and minute.

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

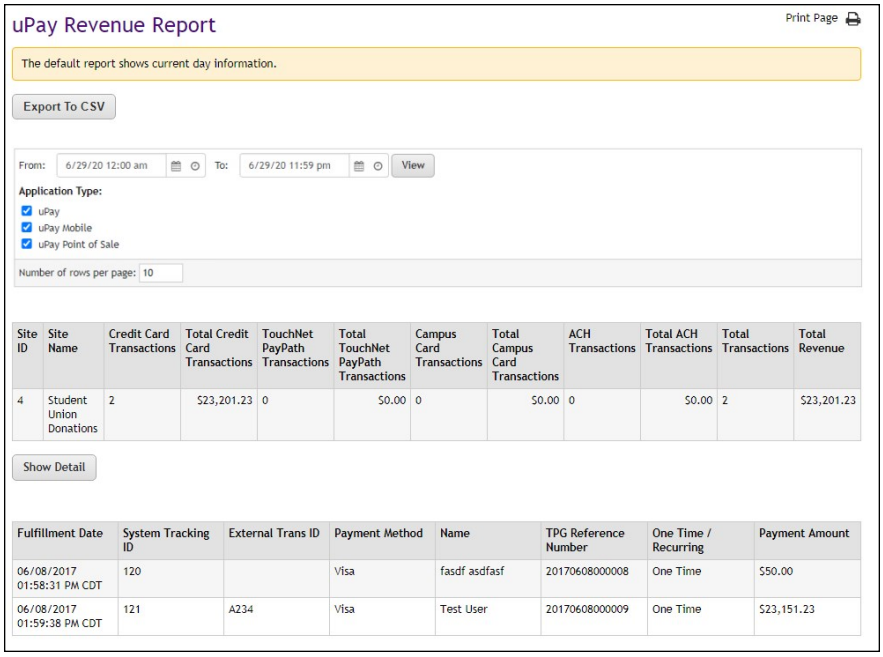
The uPay Revenue report is available for a uPay site's site managers, merchant managers, and store accountants.

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.

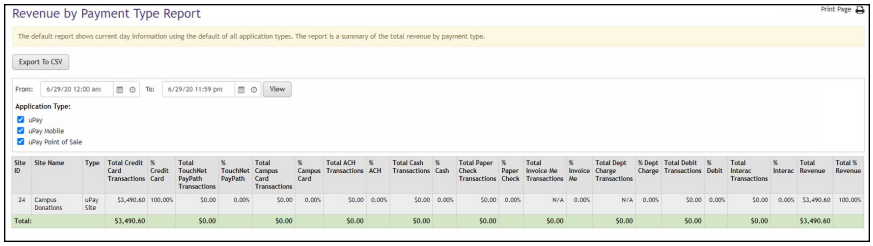
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Revenue by Payment Type Report

Merchant managers and uPay site managers can open the Revenue by Payment Type Report.

It shows a summary of activity by payment type for the uPay site. Each payment type is represented by a revenue amount and a percentage of each merchant's total revenue.



The following transaction types are displayed in this report:

- Credit Card
- Campus Card
- ACH
- Invoice Me
- Departmental Charge
- Debit
- Interac

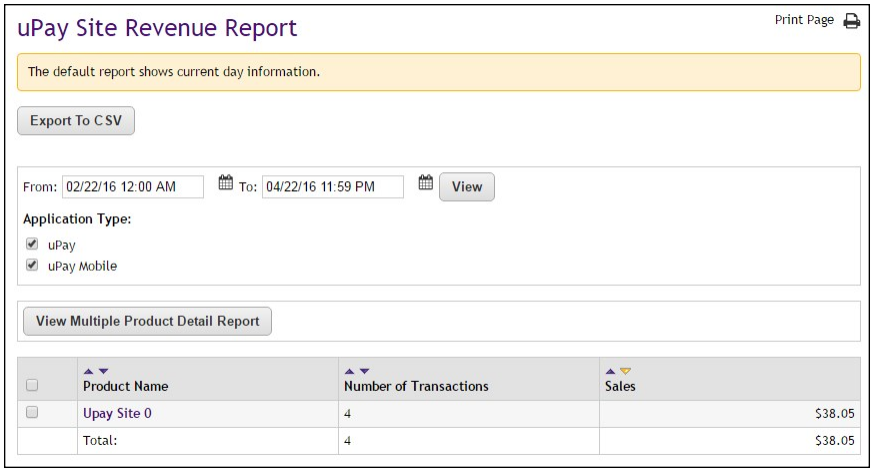
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Important! We strongly recommend you limit the search criteria to a fairly restricted time period. The longer the time period, the greater the data, and large amounts of data may cause the report generation process to time out.

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.



All uPay site products are listed on the uPay Site Revenue Report.

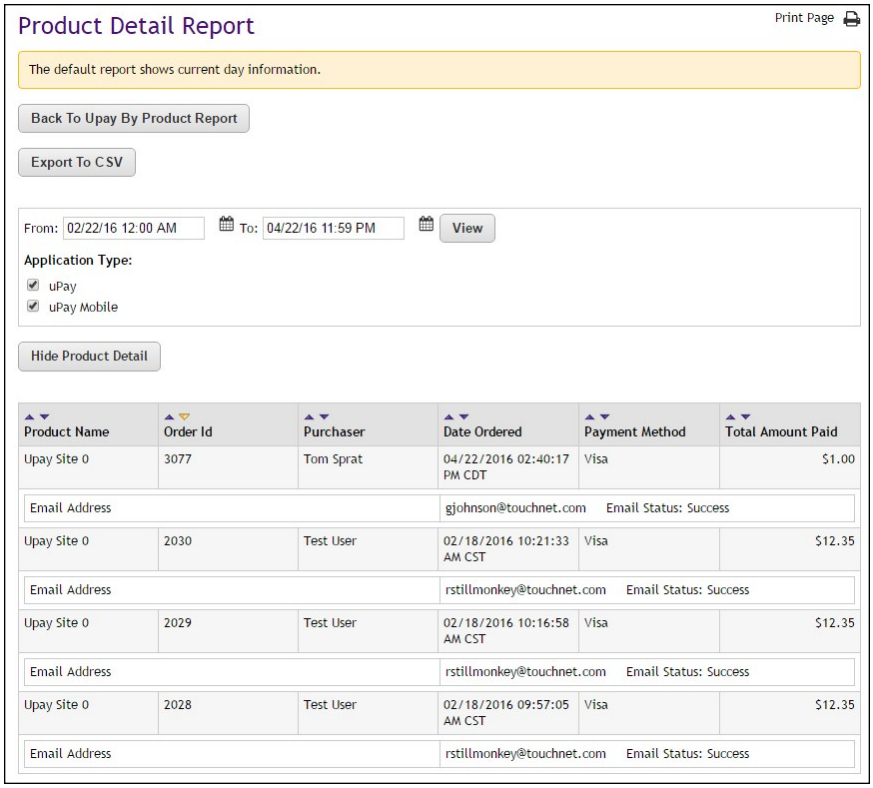
The uPay Site Revenue Report lists the main uPay product and any "Additional Donations" (if applicable) that received donation funds during the selected date range. The product names listed in the Product Name column appear as links that can be selected to view the Product Detail Report for the corresponding 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.

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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, the purchaser's name, the date ordered, the payment method, and the total amount paid for each transaction.

The Show/Hide Product Detail button can be selected to show/hide the e-mail addresses of the customers/purchasers. When the e-mail addresses are displayed, the status of each e-mail message is also indicated (success or fail).

The payment information in this report can be exported by using the "Export to CSV" button. The following information is available when the report is exported: Product Name, Order Id, Terminal Id, Purchaser, Date Ordered, Payment Method, Total Amount Paid, Email Address, Email Status, Cashier Id, Accounting Code, Card # (last 4), TPG Ref #, CC Auth Code, External Transaction Id, and Linked Session Id.

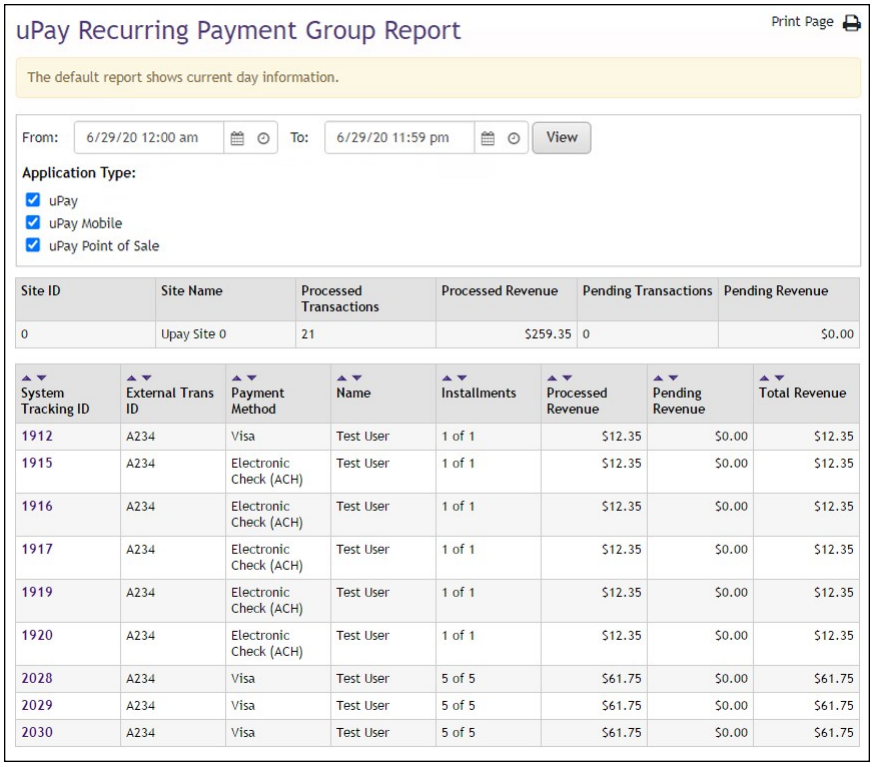
uPay Recurring Payment Group Report

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

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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

Print Page

The default report shows current day information.

From: 6/29/20 12:00 am To: 6/29/20 11:59 pm View

Application Type:

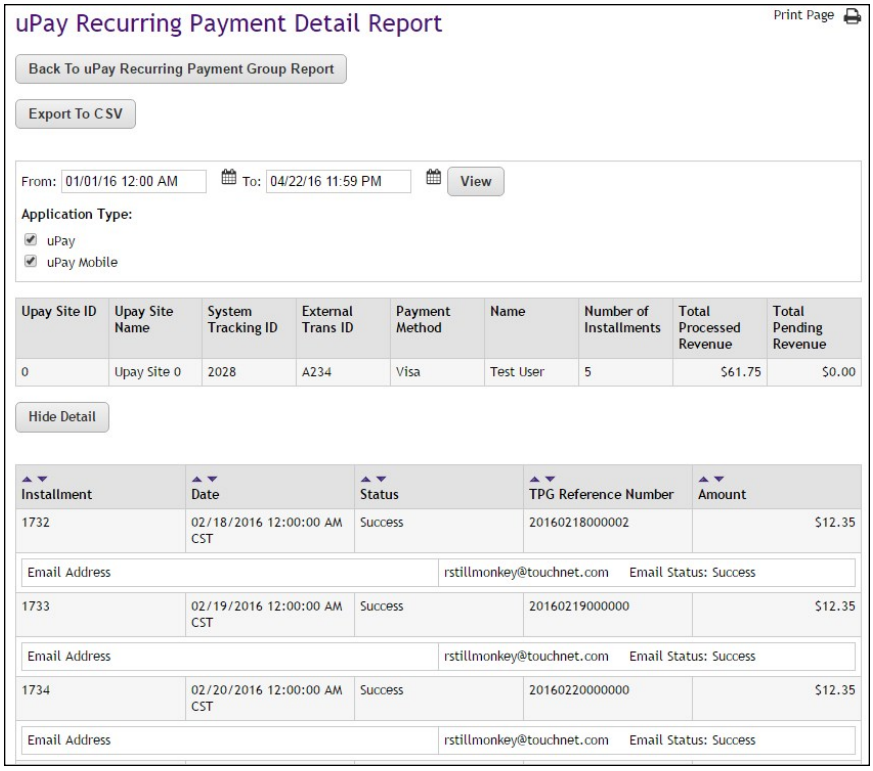
- uPay
- uPay Mobile
- uPay Point of Sale

Site ID	Site Name	Processed Transactions	Processed Revenue	Pending Transactions	Pending Revenue
0	Upay Site 0	21	$259.35	0	$0.00

System Tracking ID	External Trans ID	Payment Method	Name	Installments	Processed Revenue	Pending Revenue	Total Revenue
1912	A234	Visa	Test User	1 of 1	$12.35	$0.00	$12.35
1915	A234	Electronic Check (ACH)	Test User	1 of 1	$12.35	$0.00	$12.35
1916	A234	Electronic Check (ACH)	Test User	1 of 1	$12.35	$0.00	$12.35
1917	A234	Electronic Check (ACH)	Test User	1 of 1	$12.35	$0.00	$12.35
1919	A234	Electronic Check (ACH)	Test User	1 of 1	$12.35	$0.00	$12.35
1920	A234	Electronic Check (ACH)	Test User	1 of 1	$12.35	$0.00	$12.35
2028	A234	Visa	Test User	5 of 5	$61.75	$0.00	$61.75
2029	A234	Visa	Test User	5 of 5	$61.75	$0.00	$61.75
2030	A234	Visa	Test User	5 of 5	$61.75	$0.00	$61.75

You can view additional information by clicking a System Tracking ID number. The uPay Recurring Payment Detail Report is then displayed for the selected System Tracking ID.

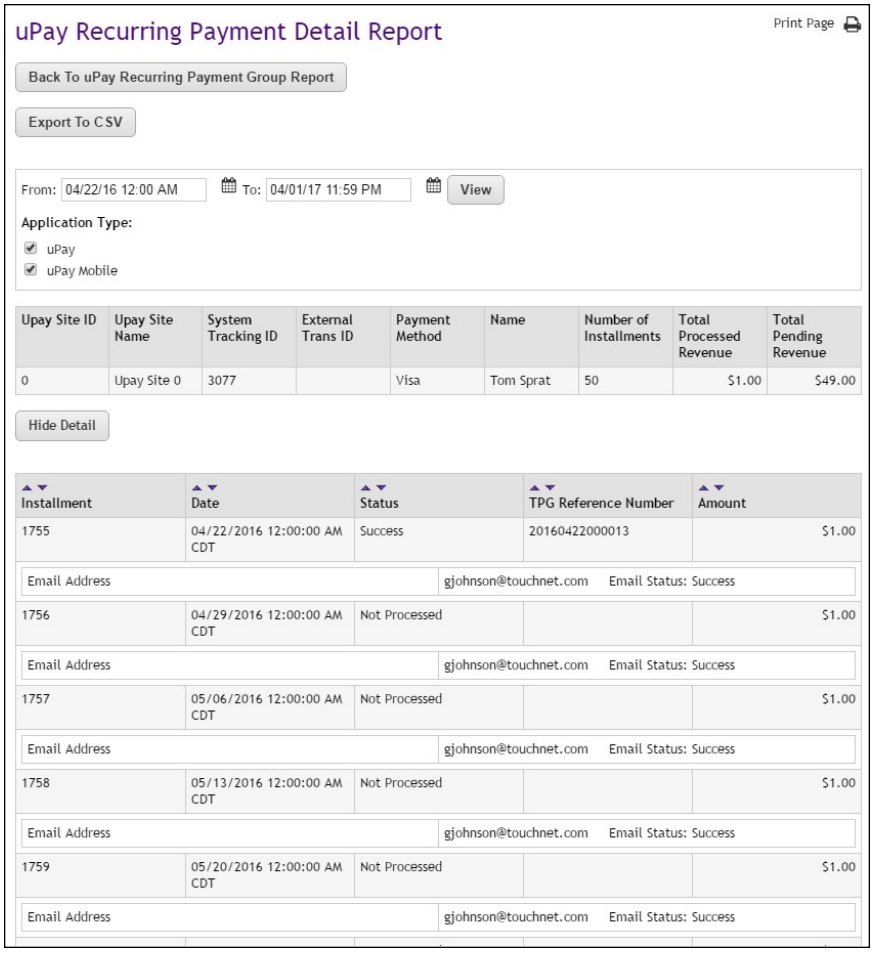
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On the Recurring Payment Detail Report, you can view scheduled recurring payments by selecting a future date range that includes the scheduled payments. The Status column shows payments that have been processed ("Success") and payments that are scheduled to be processed in the future ("Not Processed").

The status of e-mail recurring payment confirmation messages is displayed (Success or Failure). You can hide the e-mail address information and contract the list of installments by selecting the Hide Detail button.

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uPay Recurring Payment Detail Report

Print Page

Back To uPay Recurring Payment Group Report

Export To CSV

From: 04/22/16 12:00 AM To: 04/01/17 11:59 PM View

Application Type:

uPay

uPay Mobile

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	Upay Site 0	3077		Visa	Tom Sprat	50	$1.00	$49.00

Hide Detail

Installment	Date	Status	TPG Reference Number	Amount
1755	04/22/2016 12:00:00 AM CDT	Success	20160422000013	$1.00
Email Address		gjohnson@touchnet.com	Email Status: Success	
1756	04/29/2016 12:00:00 AM CDT	Not Processed		$1.00
Email Address		gjohnson@touchnet.com	Email Status: Success	
1757	05/06/2016 12:00:00 AM CDT	Not Processed		$1.00
Email Address		gjohnson@touchnet.com	Email Status: Success	
1758	05/13/2016 12:00:00 AM CDT	Not Processed		$1.00
Email Address		gjohnson@touchnet.com	Email Status: Success	
1759	05/20/2016 12:00:00 AM CDT	Not Processed		$1.00
Email Address		gjohnson@touchnet.com	Email Status: Success	

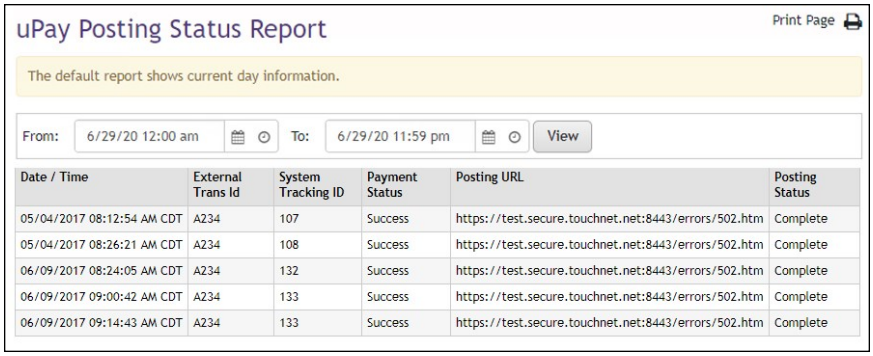
In this case, assume the above screen shot was captured on 4/22/2016. Therefore, installment 1755 on 4/22/2016 has been processed and shows a status of "Success," while installments 1757 through 1759 are scheduled for future dates and show a status of "Not Processed."

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.

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uPay Posting Status Report

Print Page

The default report shows current day information.

From: 6/29/20 12:00 am To: 6/29/20 11:59 pm View

Date / Time	External Trans Id	System Tracking ID	Payment Status	Posting URL	Posting Status
05/04/2017 08:12:54 AM CDT	A234	107	Success	https://test.secure.touchnet.net:8443/errors/502.htm	Complete
05/04/2017 08:26:21 AM CDT	A234	108	Success	https://test.secure.touchnet.net:8443/errors/502.htm	Complete
06/09/2017 08:24:05 AM CDT	A234	132	Success	https://test.secure.touchnet.net:8443/errors/502.htm	Complete
06/09/2017 09:00:42 AM CDT	A234	133	Success	https://test.secure.touchnet.net:8443/errors/502.htm	Complete
06/09/2017 09:14:43 AM CDT	A234	133	Success	https://test.secure.touchnet.net:8443/errors/502.htm	Complete

The report shows the following columns for each posted transaction.

- **Date/Time**
- **External Trans ID** – this is the unique ID that would be generated by the external site, and appears only if passed by the external site on the link to uPay.
- **System Tracking ID** – this is the Marketplace order number.
- **Payment Status** – always shows successful transactions and also shows cancelled transactions if you require them in your posted data.
- **Posting URL** – shows your posting URL
- **Posting Status** – shows one of these codes.
  - **Processing** indicates posting currently in process.
  - **Complete** indicates a completed, successful post.
  - **Error** indicates that the external site signaled an error while trying to post the payment.
  - **Unknown** indicates that uPay posted the payment data to the posting URL but did not receive a response. This situation may be the result of high network traffic (a timeout may have occurred). It may also mean the campus server was not available.

  Note: For TouchNet DataCenter customers, a posting status of Unknown may mean the posting 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 Posted Parameters Report

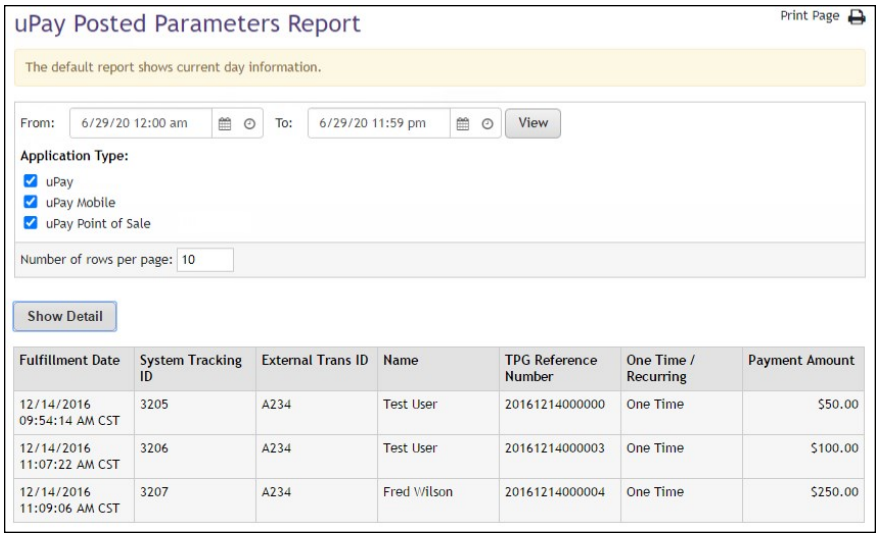
This report displays any parameters that were configured in the "Display Name Settings" section of the uPay Form Parameters page, as described in "How to Configure Parameters" on page 526. The uPay site's site manager,

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merchant manager, payment clerk, or accountant can see the site's uPay Posted Parameters report.

The payment information in this report can be exported by using the "Export to CSV" button. The posted parameters appear in new columns to the right of the other data in the CSV file.

Note: Data older than 24 months will no longer by readily available for use in Marketplace. When you run a Posted Parameters report for uPay, you won't be able to pull more than 24 months worth of historical data; and you won't be able to do Order/Payment searches based on parameters that were tied to data more than 24 months old. Related to Return Policy historical data (for uPay and uStores), the copy of the return policy for a given order older than 24 months will not be readily available. *Note:* You can still do Order/Payment searches greater than 24 months, but you won't get results if you are searching based on a Posted Parameter Value.



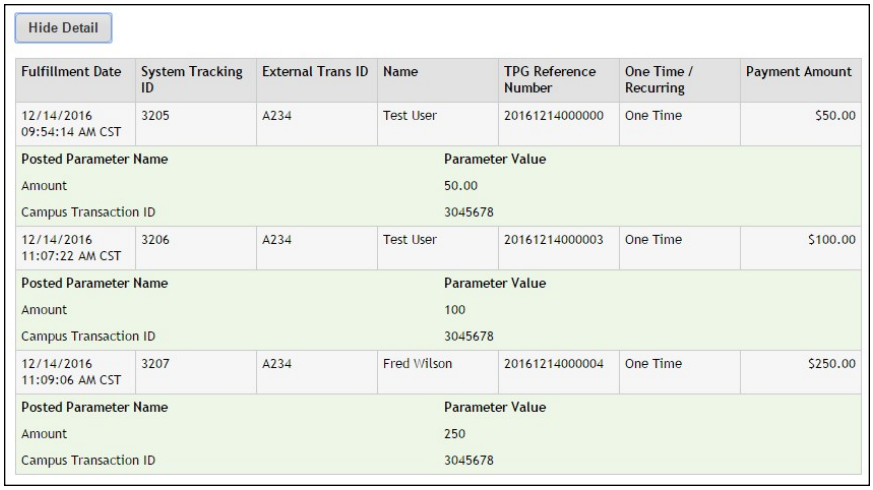
The report shows the following columns for each posted transaction.

- **Fulfillment Date**
- **System Tracking ID** – This is the Marketplace order number.
- **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 to uPay (as EXT_TRANS_ID).
- **Name** – Shows the customer name.
- **TPG 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.

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- **One Time/Recurring** – Identifies whether the payment is a one-time payment or a recurring payment.
- **Payment Amount**

Select the Show Detail button to show the posted parameters. Additional fields are then displayed.

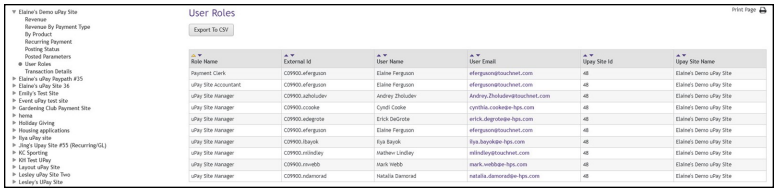


- **Posted Parameter Name** – The Display Name for each parameter configured on the uPay Form Parameters page (with Yes selected for "Display in Reports/Searches") will be displayed in this column. For more information about configuring parameters for display in this column, see **"How to Configure Parameters" on page 526**.
- **Parameter Value** – This column appears to the right of the Posted Parameter Name column, and the value that appears in this column represents the value passed for the corresponding parameter. If no value was passed, "No Value Passed" appears in this column.

User Roles Report

Merchant managers and uPay site managers can open the User Roles Report.

This report shows a list of all assigned user roles for this uPay site—uPay site managers, payment clerk, and site accountants.



The report is initially sorted by Role Name (the far left column); however, you can select the arrows in the column headers to choose a different sorting method.

You can also see the email address setup for each user. When the report is viewed in the Operations Center the email address will be a hyperlink that can be clicked to trigger an email message (based upon your computer's

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configuration). When downloaded to a .CSV file the report will contain email addresses that can be gathered for email or other uses.

You can export this report in CSV format.

Transaction Detail Report - uPay Sites

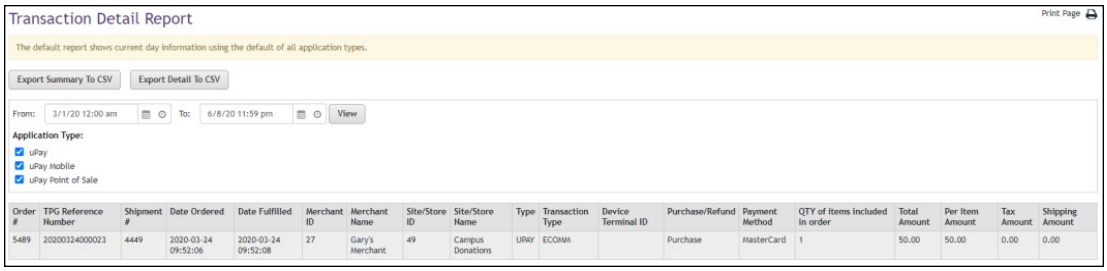
The Transaction Detail report contains all available order, shipping, and fulfillment information for the selected date and time range. This report is available for uStores, uPay, and Marketplace Point-of-Sale.

Users with the Site Manager role have access to view the Transaction Detail report.

A summary view of the report displays initially within the Marketplace Operations Center. You can export the report data in CSV format to view a detailed view of the report data. To view the detailed report data, click on the Export Detail To CSV button. The Transaction Detail Report is available for Marketplace Administration, Merchants, Stores, uPay Sites.

You can also select the desired Application Type for the report. By default all the available application types are selected, but you can click on the checkbox to exclude an application type from your report data.

For each transaction, the summary report includes: Order #, TPG Reference Number, Shipment #, Date Ordered, Date Fulfilled, Merchant ID and Name, Site/Store ID and Name, Application Type, Transaction Type, Device Terminal ID (if applicable), Purchase or Refund, Quantity of Items in Order, Total Amount, Per Item Amount, Tax Amount, Shipping Amount.



The Transaction Detail Report

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19.0 Marketplace Exceptions

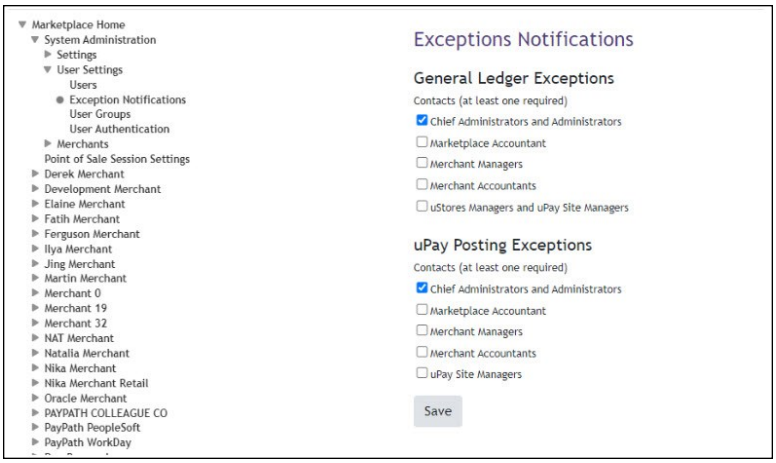
This section of the *Marketplace User's Guide* discusses two types of Marketplace exceptions: general ledger exceptions and posting exceptions.

Both types of exceptions require actions be taken.

General Ledger and Posting Exceptions Emails

This enhancement adds the ability for schools to configure who will receive emails when General Ledger or Posting Exceptions are encountered.

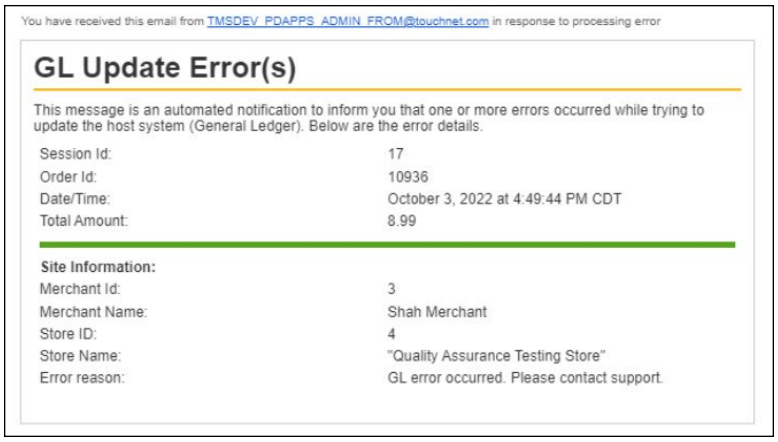
A new menu item System Administration > User Settings > Exception Notifications has been created that will allow at least one role (and up to five roles) to receive General Ledger or Posting Exception notifications. The default values upon installation will be Chief Administrators and Administrators. Updates can be made to include or exclude the Marketplace Accountant, Merchant Manager, Merchant Account and uStores or uPay Site Managers roles.



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The General Ledger Exception emails have been enhanced to include:

- Total Amount of the transaction
- Merchant ID (Merchant Name was already present)


You have received this email from TMSDEV_PDAPPS_ADMIN_FROM@touchnet.com in response to processing error

GL Update Error(s)

This message is an automated notification to inform you that one or more errors occurred while trying to update the host system (General Ledger). Below are the error details.

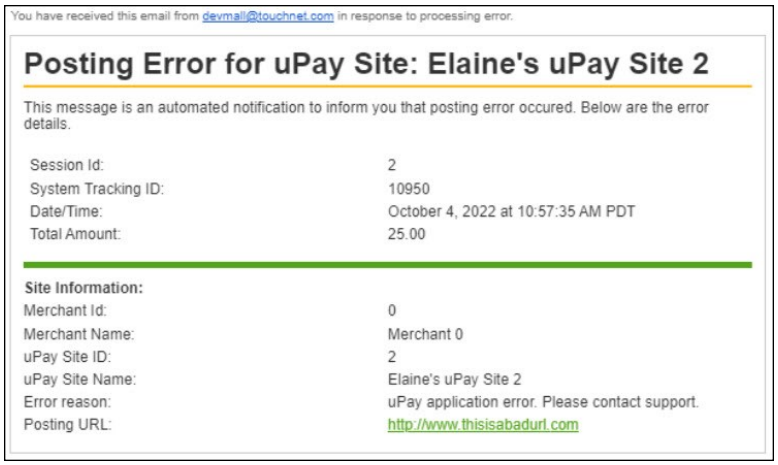
Session Id:	17
Order Id:	10936
Date/Time:	October 3, 2022 at 4:49:44 PM CDT
Total Amount:	8.99

Site Information:

Merchant Id:	3
Merchant Name:	Shah Merchant
Store ID:	4
Store Name:	"Quality Assurance Testing Store"
Error reason:	GL error occurred. Please contact support.

The Posting Exception emails have been enhanced to include:

- Total Amount of the transaction
- Merchant ID (Merchant Name was already present)
- Error code/reason for posting failure


You have received this email from devmall@touchnet.com in response to processing error.

Posting Error for uPay Site: Elaine's uPay Site 2

This message is an automated notification to inform you that posting error occured. Below are the error details.

Session Id:	2
System Tracking ID:	10950
Date/Time:	October 4, 2022 at 10:57:35 AM PDT
Total Amount:	25.00

Site Information:

Merchant Id:	0
Merchant Name:	Merchant 0
uPay Site ID:	2
uPay Site Name:	Elaine's uPay Site 2
Error reason:	uPay application error. Please contact support.
Posting URL:	http://www.thisisabadurl.com

19.1 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

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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

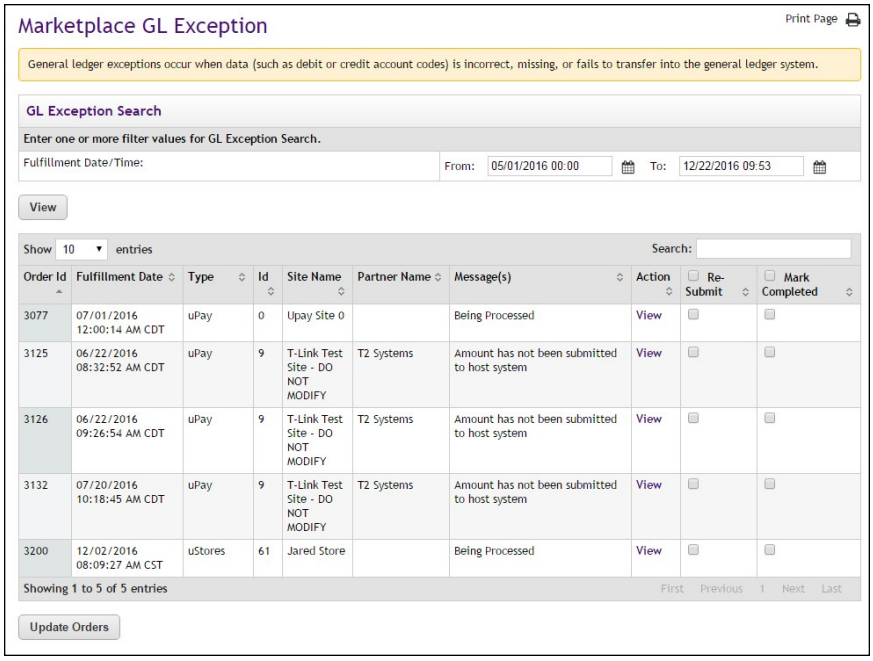
General Ledger Exceptions can be viewed in the following locations in the Marketplace Operations Center:

- 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 is an example of a GL Exception page :

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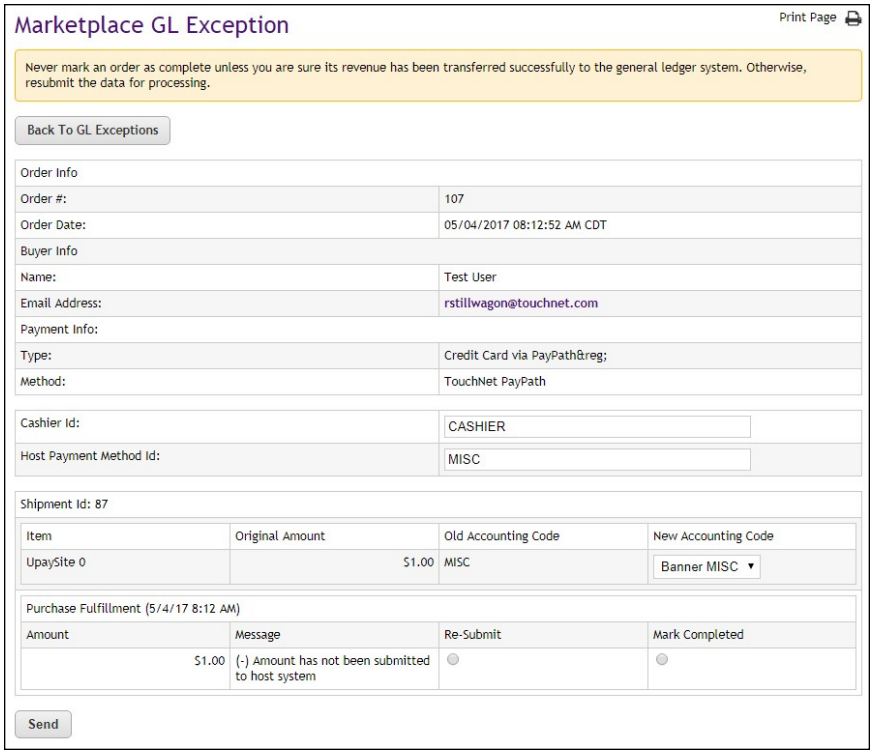
The Marketplace GL Exception page includes the ability to re-submit transactions to your general ledger system.

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.

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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-submited 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 763**, **"Fixing Exceptions Caused By Invalid Data" on page 764**, and **"Fixing Exceptions Caused by Communication Issues" on page 765**

Fixing Exceptions Caused By Missing Data

When you view the GL Exception page (as described in **"Viewing General Ledger Exceptions" on page 761**), 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.

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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 761**), 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.

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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.

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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:

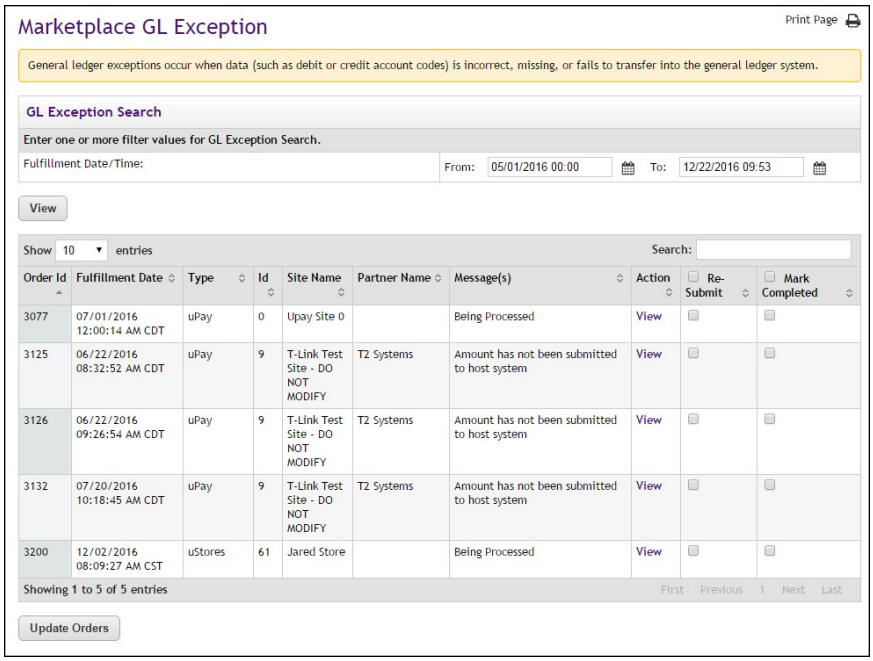
1. On the GL Exception page, select the View link in the Action column for the transaction with the missing data. The details page then appears.
2. Select the Re-Submit radio button.

   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.

Resubmitting Multiple GL Exceptions at the Same Time

The Marketplace GL Exception pages contain functionality that allows you to resubmit (or mark as completed) multiple transactions at the same time. This functionality is located in the far right columns, named Re-Submit and Mark Completed.



The Marketplace GL Exception page includes the ability to resubmit transactions and to mark transactions as completed.

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Important! The process of resubmitting multiple GL exception transactions will send the transactions to your general ledger system without any changes to the data. You must be confident that the transactions require no changes before you use this functionality. If a transaction requires a change (such as correcting a general ledger accounting code), then you should use the View link for that transaction in order to inspect the data details and make the necessary modifications.

To resubmit multiple transactions to your general ledger system (or to mark transactions as completed), follow these instructions:

1. For each transaction listed on the Marketplace GL Exception page, select either the Re-submit checkbox or the Mark Completed checkbox. (Or to select all displayed transactions, select the checkbox in the column header.)

   Note: If the data has in fact already been received by the general ledger system, select the Mark Completed checkbox. The data will not be resubmitted. The transaction will be removed from the GL Exception page.

2. Repeat Step 1 for any additional transactions.
3. Select the Update Orders button.

If you attempt to resubmit more than 10 transactions at the same time, a message will appear, asking if you would like to proceed. The process of resubmitting a single transaction may take several seconds. Re-submitting several transactions at the same time may take several minutes.

Marketplace will allow you to resubmit a maximum of 50 transactions at the same time.

19.2 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.

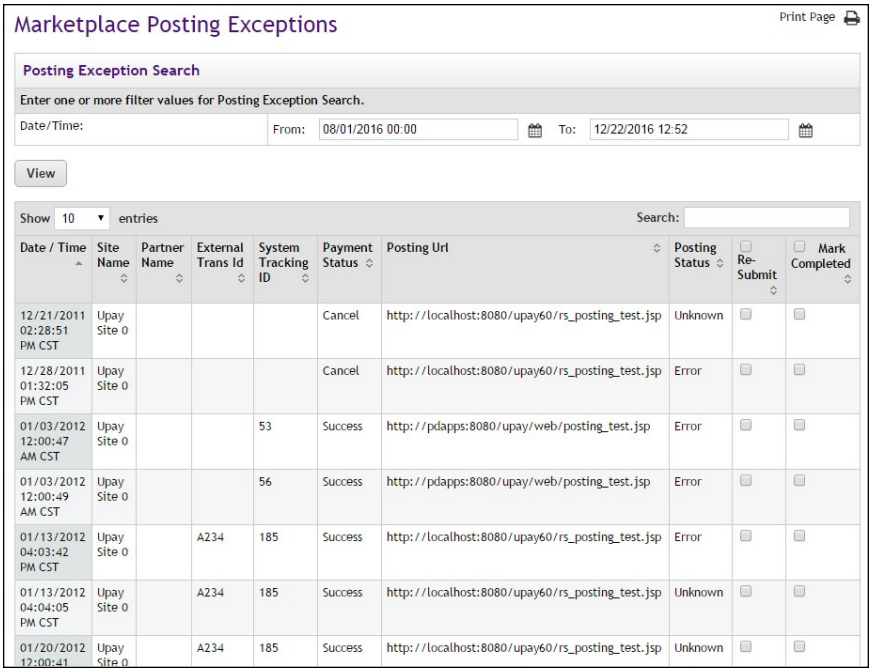
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Viewing Posting Exceptions

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 :



The Marketplace Posting Exceptions page.

All transactions that appear on the 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 768**

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

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describes the actions that you must take.

Types of Posting Exceptions

Posting Status	Description
Error	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). This posting status may also appear if the posting URL was not available (in which case, Marketplace received a Not Found response). 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. If the posting URL value in the uPay settings is valid, you can re-post the transaction information by selecting the Re-Submit checkbox on the Posting Exceptions page. 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.
Unknown	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.) 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. You can attempt to re-post the transaction information by selecting the Re-Submit checkbox on the Posting Exceptions page.

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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.

Reposting Multiple Posting Exceptions at the Same Time

The Marketplace Posting Exceptions pages contain functionality that allows you to repost multiple transactions at the same time to the posting URLs (or to mark multiple transactions as completed). This functionality is located in the far right columns, named Re-Submit and Mark Completed.

Important! Before reposting multiple posting exceptions, you should have investigated why the posting attempts failed. You should be confident that the transactions require no modifications to uPay site configuration or to the campus web application (or if modifications are required, you should be confident those changes have taken place).

To resubmit multiple transactions to posting URLs (or to mark transactions as completed), follow these instructions:

1. For each transaction listed on the Marketplace Posting Exceptions page, select either the Re-submit checkbox or the Mark Completed checkbox. (Or to select all displayed transactions, select the checkbox in the column header.)

   Note: If the data has in fact already been received by the posting URL, select the Mark Completed checkbox. The data will not be reposted. The transaction will be removed from the Posting Exception page.

2. Repeat Step 1 for any additional transactions.
3. Select the Update Posting Exceptions button.

If you attempt to repost more than 10 transactions at the same time, a message will appear, asking if you would like to proceed. The process of reposting a single transaction may take several seconds. Reposting several transactions at the same time may take several minutes.

Marketplace will allow you to resubmit a maximum of 50 transactions at the same time.

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