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Everywhere Money Moves.™

Marketplace 6.5

User's Guide

March 2013

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

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

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

To Contact Customer Care

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

<table>
<thead>
<tr>
<th>Telephone:</th>
<th>888-621-4451 or 913-599-6699</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fax:</td>
<td>913-599-5588</td>
</tr>
<tr>
<td>E-mail:</td>
<td><a href="mailto:CustomerCare@touchnet.com">CustomerCare@touchnet.com</a></td>
</tr>
<tr>
<td>Web site:</td>
<td><a href="https://clientcommunity.touchnet.com/web">https://clientcommunity.touchnet.com/web</a></td>
</tr>
</tbody>
</table>
| Address:          | TouchNet Information Systems, Inc.  
|                   | 15520 College Boulevard       |
|                   | Lenexa, Kansas 66219          |
TouchNet Customer Care is available Monday through Friday between 7:00 a.m. and 7:00 p.m. Central Time. Extended support hours are available by agreement with TouchNet.
What's New in Marketplace 6.5

Marketplace 6.5 contains the following enhancements:

- **Home page enhancements**—The Marketplace Operations Center home page now allows you to search orders AND uPay site transactions across all stores and uPay sites. It also allows you to directly launch uStores (both for the mall and for specific stores). Additional columns on the home page display merchant names and the display mode (mall or single-store). The uPay site section now contains a column that allows you to easily identify if a uPay site uses T-Link. New sorting and searching functionality helps you find stores and uPay sites quickly. For more information, see "Your Home Page" on page 20.

- **Tax service**—Marketplace now offers a tax service for computing taxes. The tax service maintains tax rates for all USA states and territories. Tax rates are updated monthly. Tax rates are applied at a ZIP+4 level, thus providing greater accuracy. For more information, see "Tax Configuration" on page 143.

- **Table Builder for modifiers**—Table Builder organizes modifiers into a table format, making it more convenient for customers to enter information for multiple modifiers during the uStores checkout process. For more information about Table Builder, see "Using Product Modifiers" on page 280.

- **Dynamic frequency for modifiers**—Modifiers that the user designates as dynamic will be repeated for each quantity ordered. For example, if the product is an event registration, the customer might register multiple people to attend the event. You can use the Dynamic frequency option to repeat the modifier prompt and ask for a name and contact information (or any other information you desire) for each registrant. For more information about using the dynamic frequency, see "Using Product Modifiers" on page 280.

- **E-mail message enhancements**—The formats of several automatic e-mail messages have been improved and are now sent in HTML format. These e-mail messages include order confirmations, fulfillment confirmations, and refund confirmations for uStores and Notification of Payment messages for uPay. For more information, see "Automatic E-mail Messages" on page 325.

- **Localization**—You can now configure the default time zone for your installation of Marketplace (on the Administrative General Settings page) and this time zone will be used for transactions, reports, and other Operations Center functionality.

- **Text entry validation for modifiers**—With the text entry type of product modifier, you will have the opportunity to determine if validation should be performed on the customer’s entry. Several
validation methods are available. For more information, see "Validation Formats for Text Entries" on page 289.

- **QR codes**—You can now generate QR codes that can be downloaded for use on printed material. Each QR code represents a URL for a destination within the Marketplace mall, such as the mall home page, a product category, a store home page, or a product detail page. Users with mobile phones—and applications with QR code functionality—can photograph the Marketplace QR code and immediately navigate to the web page that is represented. For more information, see "QR Code Management for Mall Home Page" on page 99.

- **Image upload**—You can now upload images for use with style sheets. These images can be uploaded for the mall style sheet, for single-store mode style sheets, and for uPay style sheets. See "Style Sheet Image Management" on page 127 for more information.

- **Additional items can be offered during checkout**—You can now configure additional items to be offered to shoppers during the checkout process. Additional items can be configured for both uStores and uPay. See "Additional Donations" on page 355 for more information.

- **Integration with PeopleSoft Enterprise Financials**—Marketplace now features general ledger integration with PeopleSoft Enterprise Financials. When PeopleSoft general ledger functionality is used with Marketplace, accounting codes can be established and associated with Marketplace stores, uPay sites, products, tax rates, and shipping rates. See the PeopleSoft Setup Guide for Marketplace 6.5 for more information.

- **Preview mode for uStores**—You can use the preview status to view how a store will look and function before bringing the store online. Preview status is particularly important if you have made modifications to the style sheet of a store in single-store mode: once you make the style sheet modifications, you can use preview mode to see the effects of the style sheet modifications. See "Using Preview Status" on page 162 for more information.

- **Scheduling of store status changes**—You can now schedule status changes for stores. For example, you can schedule when a store should be online (and thus available for shoppers) by entering a specific date and time. Likewise, you can schedule when a store that is currently online should go offline. See "Scheduling Status Updates" on page 163 for more information.

- **Campus cards**—You can now configure stores and uPay sites to accept campus cards. Supported campus cards include Blackboard and CBORD. See "Notes on Payment Methods" on page 193 for more information.

- **Product articles and options are now editable**—As your inventory changes, you can modify the product articles to meet your needs. Marketplace now allows you to modify product options for existing
products and to add new options. Articles are also now known as "Items for Sale." See "Product Status Management" on page 296 for more information.

- **Enhancements to donation amount fields for uStores**—You can now configure donation products to display multiple suggested donation amounts to customers. You can also choose to display an entry field for a customer-entered donation amount. See "Editing Donation Settings" on page 259 for more information.

- **Tax reports**—New Marketplace reports are available that contain tax information. These reports are available for the entire mall, for specific merchants, and for individual stores. These reports show the tax collected, tax rates, and other tax-related information. See "Administrative Tax Report" on page 478 for more information.

- **Enhanced Product Detail Report**—You can now decide which products to display on a Product Detail Report. Instead of seeing all the orders from a store, choose only the products that interest you on the "Store Revenue Report" and generate a report customized for those products. See "Store Revenue Report by Product" on page 481 for more information.

- **Additional text can now be added to uPay confirmation messages**—You can now add text to uPay e-mail confirmation messages. This text will appear at the top of confirmation messages. See "Miscellaneous: Links, URLs, and E-mail" on page 371 for more information.

- **Alternate text for continue button in uPay**—You can now change the text that will be used on the Continue button in uPay. See "Miscellaneous: Links, URLs, and E-mail" on page 371 for more information.

- **Prompt for user timeout**—A prompt for users will now appear after the timeout period has been reached. This prompt will appear for uStores customers, uPay customers, and Operations Center users.

- **Disable uPay e-mail message**—You can now configure your uPay site to NOT send Payment Notification e-mail messages when payments are received. This configuration is on the uPay Miscellaneous Settings page.

- **Partner-Driven Recurring Payments with T-Link**—TouchNet Ready Partners can now control the recurring payment process by initiating each payment. The partner first passes parameters to T-Link that establish an ongoing payment relationship. Once the customer enters their payment information, the partner's web application can initiate future payments for the customer. For more information, see the T-Link Guide for TouchNet Ready Partners.
Part 1: Marketplace Introduction
1.0 Introduction to Marketplace

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

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

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

1.1 Marketplace Web Applications

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

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

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

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

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

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

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

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

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

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

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

What You’ll See After You Login

After you login to U.Commerce, you will see the U.Commerce home page. The top navigation bar shows all the U.Commerce products that are available for you to use. Marketplace will appear as one of the links in the top navigation bar.

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

On your very first login, you’ll be taken to your Marketplace User Profile page so you can enter your name and contact information. After you enter this information, your Marketplace Operations Center Home page appears. Initially, your home page contains few links and little information. However, as stores and uPay sites are created, the home page will grow in size. This page displays statistics for all the stores and uPay sites available to the user. If this is the first time you have used Marketplace and no stores or uPay sites have thus far been created (to which you have access), you will see no statistics displayed on the home page.

Site Navigation

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

The left navigation menu displays only those functions that are available to you, depending on your user rights.
As you create stores and uPay sites, additional links will appear in the left navigation menu and additional rows will be displayed in the page’s statistics tables. On the other hand, if your own duties are limited to system administrative duties, you may not see any additional links in the left navigation menu.

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 Store Order Search functionality).

A Key Concept: Marketplace Merchant

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

Marketplace’s use of the term "merchant" allows stores and uPay sites to be grouped into a logical structure. Each merchant in Marketplace can have one or more stores and one or more uPay sites. Before you can create a Marketplace store, you must create a Marketplace merchant. Settings are associated with this merchant that affect its stores and uPay sites.
In addition, each merchant is assigned a merchant manager who creates the stores or uPay sites and manages the merchant’s settings, such as the wait period for ACH payments, ACH agreements for uPay sites, and return check fees.

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.

<table>
<thead>
<tr>
<th>User Role</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chief Administrator</td>
<td>• Responsible for adding additional chief administrator and administrators. (See Section , &quot;Adding Administrative Users&quot; on page 130.)</td>
</tr>
<tr>
<td></td>
<td>• Responsible for editing administrative-level user roles.</td>
</tr>
<tr>
<td></td>
<td>• Can reset user passwords for all users.</td>
</tr>
<tr>
<td></td>
<td>• Can modify user information for all users.</td>
</tr>
<tr>
<td></td>
<td>• Can disable users.</td>
</tr>
<tr>
<td></td>
<td>• Can also perform any of the responsibilities listed below for administrators.</td>
</tr>
<tr>
<td>User Role</td>
<td>Responsibilities</td>
</tr>
<tr>
<td>------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Administrator</td>
<td>• Responsible for creating merchants. (See &quot;Adding Merchants&quot; on page 133.)</td>
</tr>
<tr>
<td></td>
<td>• Responsible for assigning merchant managers to merchants. (&quot;Adding Managers&quot; on page 140.)</td>
</tr>
<tr>
<td></td>
<td>• Responsible for establishing and maintaining configuration settings that affect all Marketplace stores, including accounting codes, tax account codes, product categories, splash page images, header images, and ACH agreements for stores. (&quot;System Administration Settings&quot; on page 89.)</td>
</tr>
<tr>
<td></td>
<td>• Responsible for assigning an accountant to view reports. (See &quot;Adding Administrative Users&quot; on page 130.)</td>
</tr>
<tr>
<td>Accountant</td>
<td>• Responsible for reviewing the Revenue by Merchant report. (&quot;Revenue by Merchant Report&quot; on page 477.)</td>
</tr>
<tr>
<td>Merchant Manager</td>
<td>• Responsible for managing the merchant’s configuration settings, such as the wait period for ACH payments, ACH agreements for uPay sites, and return check fees. (&quot;Merchant Settings&quot; on page 135)</td>
</tr>
<tr>
<td></td>
<td>• Responsible for adding stores to a merchant. (&quot;Adding a New Store&quot; on page 149.)</td>
</tr>
<tr>
<td></td>
<td>• Responsible for assigning store managers to stores and uPay site managers to uPay sites. (See &quot;Adding Managers&quot; on page 140 and &quot;Adding uPay Site Users&quot; on page 428.)</td>
</tr>
<tr>
<td></td>
<td>• Responsible for adding uPay sites to a merchant. (&quot;Building a uPay Site&quot; on page 357)</td>
</tr>
<tr>
<td>Store Manager</td>
<td>• Responsible for managing store settings, such as the store images, store categories, store payment methods, and shipping rates. (&quot;Store Settings&quot; on page 150)</td>
</tr>
<tr>
<td></td>
<td>• Responsible for assigning store clerks, a store contact, a store accountant, and fulfiller users (including a fulfiller with refund/cancel rights). (&quot;Adding Store Users&quot; on page 187.)</td>
</tr>
<tr>
<td></td>
<td>• Responsible for adding and editing products. (See &quot;Adding Products to a Store&quot; on page 229.)</td>
</tr>
<tr>
<td></td>
<td>• Responsible for creating store promotions. (See &quot;Creating Store Promotions&quot; on page 207.)</td>
</tr>
<tr>
<td>Store Clerk</td>
<td>• Responsible for adding and editing products. (&quot;Adding Products to a Store&quot; on page 229.)</td>
</tr>
<tr>
<td></td>
<td>• Responsible for moving products among categories. (See &quot;Managing Products in a Store&quot; on page 249)</td>
</tr>
<tr>
<td>Filler</td>
<td>• Responsible for fulfilling orders. (See &quot;About Payment Types and Fulfillment&quot; on page 313.)</td>
</tr>
</tbody>
</table>
### User Role

<table>
<thead>
<tr>
<th>User Role</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fulfiller with refund/cancel rights</td>
<td>• Responsible for fulfilling orders as well as refunding and cancelling orders. (See &quot;Processing Refunds&quot; on page 318.)</td>
</tr>
<tr>
<td>Store Contact</td>
<td>• Serves as the designated contact who appears on a store site. No responsibilities within the Marketplace Operations Center other than keeping their own contact information up to date on their user profile.</td>
</tr>
<tr>
<td>uPay Site Manager</td>
<td>• Responsible for managing uPay site settings. (See &quot;Managing a uPay Site&quot; on page 419.)</td>
</tr>
<tr>
<td></td>
<td>• Responsible for assigning payment clerks and store accountants. (See &quot;uPay User Roles&quot; on page 336.)</td>
</tr>
<tr>
<td>Payment Clerk</td>
<td>• Responsible for issuing uPay refunds. (See &quot;Refund a Payment&quot; on page 433.)</td>
</tr>
<tr>
<td>Store Accountant</td>
<td>• Responsible for viewing reports. Both stores and uPay sites can have store accountants. (See &quot;Marketplace Reports&quot; on page 475.)</td>
</tr>
</tbody>
</table>

### 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:

<table>
<thead>
<tr>
<th>Users with this User Role ...</th>
<th>Can assign this user role to other users ...</th>
<th>By navigating to this page in the Operations Center ...</th>
</tr>
</thead>
</table>
| Chief administrator           | • Chief administrator  
                               | • Administrator  
                               | • Accountant  
                               | • Merchant manager  | Marketplace Home > System Administration > User Settings > Users |
| Administrator                 | • Administrator  
                               | • 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 manager  
                               | • Store clerk  
                               | • Fulfiller  
                               | • Fulfiller with cancel/refund rights  
                               | • Store contact  
                               | • Store accountant  | Marketplace Home > [merchant] > Stores > [store] > Store Settings > Store Users |
Users with this User Role ...
Can assign this user role to other users ... By navigating to this page in the Operations Center ...

| uPay site managers | • Payment clerk • Store accountant | Marketplace Home > [merchant] > uPay Sites > [uPay site] > Users |

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

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

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

1. **Create Chief Administrator**—The chief administrator logs in (be sure to change the TouchNet assigned password) and assigns the chief administrator role to another person. This person can then serve as a backup or become the lead contact for building your Marketplace site. Assigning the chief administrator role involves creating a new username and password. The chief administrator forwards the login credentials and the Operations Center URL to the new chief administrator. It’s essential that more than one person in your organization serve as a chief administrator because this helps ensure that someone is always available for managing the site at the highest level.

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

3 **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, and product categories. In addition, these settings include the splash page and header image graphics. Style sheets can also be customized.

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

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

6 **Add Stores and/or uPay Sites**—Each merchant manager logs in and adds a store and/or one or more uPay sites to their merchant. (Depending on your institution’s preferences, you may use both uStores and uPay, uStores alone, or uPay alone.) As a store or uPay site is created, the merchant manager has the option of either creating a new user to serve as the store manager (or uPay site manager) or to select an existing user to serve in this role. For new store managers (or uPay site managers), the merchant manager creates a new username and password and forwards these login credentials along with the Operations Center 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 Operations Center 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 Operations Center URL if the fulfiller is a new user).

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

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

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

- **Product Maintenance**—A store manager or store clerk performs product maintenance, which includes editing product features, moving product into categories, enabling or disabling a product, and changing the inventory count of a product. In addition, user roles must be maintained so that the appropriate people have access to stores.

- **Fulfilling Orders**—A store fulfiller completes order processing by accepting payments, entering fulfillment information, and sending shipments to buyers. Fulfillers with refund/cancel rights can also cancel part or all of a pending order (if paid by credit card) and refund payment for an order.

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

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

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

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

Mall Link and Search Section

At the top of the page is a link for View Mall, which can be used to launch the uStores mall. If you have licensed Mobile, you will also see a link for View Mobile.

The Order or System Tracking ID search field provides search functionality for both uStores orders and uPay payments. This search functionality works across ALL stores and uPay sites.
### Stores Section

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

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

- **Name**—You can click on the store name to go to the Store General Settings page.
- **ID**—The store ID number.
- **Type**—Identifies whether a store is in mall mode (General) or single-store mode (Single).
- **Merchant Name**—Identifies the merchant for the store, which allows you to better understand where to find the store in the left navigation menu (which is arranged by merchant).
- **Status**—This field displays the status of the store: ONLINE, OFFLINE, and PREVIEW. You can use the status dropdown list to update the status of each store. If you have licensed Mobile, you will see a separate column for Mobile Status.
- **Fulfillments Pending**—This column displays the number of pending fulfillments for each store. If you click on the number in this column, you will go to the Store Fulfillments page.
- **Links**—You can click the View Store link to launch uStores and display the selected store. For stores in PREVIEW mode, you can click the View Store Preview to view the store in preview mode. If you have licensed Mobile, you will see a View Mobile link.

### uPay Sites Section

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

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

- **Name**—You can click on the uPay site name to go to the uPay Miscellaneous Settings page.
- **ID**—The uPay site ID number.
- **Uses T-Link**—This column provides a simple Yes/No answer to the question "Does the uPay site use T-Link?"
- **Merchant Name**—Identifies the merchant for the uPay site, which allows you to better understand where to find the uPay site in the left navigation menu (which is arranged by merchant).

- **Status**—This field displays the status of the uPay site: ONLINE and OFFLINE. You can use the status dropdown list to update the status of each uPay site.

- **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.

### 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 23.)

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.

### Store Status Updates

The home page also contains functionality that allows for users with the store manager role or the merchant manager role to update the status of their stores. For users with access to multiple stores, this functionality allows these users to bring multiple stores online and offline quickly.

The dropdown menu for each store on the home page contains the following choices:

- **ONLINE**—Once a store is brought online, the store is available for shoppers.

- **OFFLINE**—When a store is placed in offline status, 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.

Additional functionality for updating the status of stores is available on the Store General Settings page. For more information, see "Store Status Management" on page 160.
1.4 Your User Profile

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

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

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

The Store Notifications section allows you to specify whether you would like to be notified when orders are placed from stores in which you have the role of fulfiller, merchant manager or store manager. This feature is useful when you have a store with low volume and don’t want to log in every day just to see if orders were placed. To be notified when an order is
placed, simply select the checkbox beside the store name and click the Update Notifications button near the bottom of the page.

When the e-mail notification option is turned on for a specific store, you will receive a separate e-mail message for every order.
Part 2:

What Customers See
2.0 What Shoppers See

This section describes what shoppers will see in the Marketplace shopping application, uStores. (For a discussion of the Marketplace payment page application, uPay, see "Building and Managing uPay Sites" on page 333.)

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

2.1 Viewing the uStores Web Site

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

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

\[
\text{http://[server]/[context]/web/index.jsp}
\]

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

When you use the uStores URL, the uStores site home page loads in your browser, as illustrated in the following example.
For your implementation of Marketplace, the home page will be customized with a header image in the header, your splash page image, an announcement message, and your set of store categories, product categories, and stores. These customizations are created during the uStores system-level setup. For more information about these customizations, see "Administrative and Merchant Setup" on page 85.

2.2 What Shoppers See: The Mall

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

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

Products in the uStores mall can be arranged via "Product Categories." For example, all clothing products, regardless of the stores, can be placed in a category called "Apparel." Or all campus events (sporting events, seminars, theatrical productions, etc.) can be placed in a category called "Events."
Here is an example that shows what a campus mall might look like, with the major components of the page labeled.

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

**Header Image**

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

**System Administration > Settings > Images**

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

**Splash Image**

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

**System Administration > Settings > Images**

The splash image can be uploaded in whatever size you think is necessary. However, unless you modify the mall style sheet, we recommend the default size of 680 pixels wide by 250 pixels high.
Left Navigation Menu
The left navigation menu provides an easy means for your customers to navigate quickly to stores and product categories.

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

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

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

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

System Administration > Settings > Store Categories

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

System Administration > Settings > Product Categories

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

About Building the Left Navigation Menu
The administrator and store managers must work together in order to build the left navigation menu. The administrator must create store categories and product categories that are appropriate for your uStores mall. We strongly recommend that the administrator consult the store managers regarding categories that would be useful and helpful for shoppers. Once these categories are created, store managers can assign their stores to store categories and their products to product categories.
Here is an example of a left navigation menu BEFORE store or product categories have been created:

![Left Navigation Menu BEFORE](image)

*No categories have been created for this mall.*

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

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

![Left Navigation Menu AFTER](image)

*Several categories have been created for this mall.*

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

More About Store Categories

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

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

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

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

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

The Importance of Using Store Categories

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

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

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

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

Top Navigation Menu

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

Here is an example of the top navigation menu:

Home | Magazines | Log In | My Cart

Search

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

The top navigation menu contains the following information:

- Home—the Home link takes shoppers to the mall home page.
2.0 What Shoppers See

- **Register**—the Register link allows shoppers to become registered users by creating their own account, which can be used for storing payment method information, address information, and other contact information. Registered users also have access to their purchase history. In addition, some stores (private stores) may require shoppers to be registered users.

- **Log In**—the Log In link allows registered users to log in.

- **My Cart**—the My Cart link takes shoppers to their shopping cart.

- **Search**—the Search functionality allows shoppers to search stores and products.

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

```
The bottom navigation menu provides various links.
```

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

<table>
<thead>
<tr>
<th>Link Name</th>
<th>Is the link optional?</th>
<th>Can the link text be customized?</th>
<th>Where can the link be configured?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site Info</td>
<td>Yes</td>
<td>Yes</td>
<td>Enable button and link text field on General System Settings page (see page 90).</td>
</tr>
<tr>
<td>Privacy Policy</td>
<td>Yes</td>
<td>Yes</td>
<td>Enable button and link text field on General System Settings page (see page 90).*</td>
</tr>
<tr>
<td>Help</td>
<td>Yes</td>
<td>Yes</td>
<td>Enable button and link text field on General System Settings page (see page 90).*</td>
</tr>
<tr>
<td>Accessibility</td>
<td>Yes</td>
<td>Yes</td>
<td>Enable button and link text field on General System Settings page (see page 90).*</td>
</tr>
<tr>
<td>Link Name</td>
<td>Is the link optional?</td>
<td>Can the link text be customized?</td>
<td>Where can the link be configured?</td>
</tr>
<tr>
<td>-----------</td>
<td>----------------------</td>
<td>----------------------------------</td>
<td>----------------------------------</td>
</tr>
<tr>
<td>Contact Us</td>
<td>Yes</td>
<td>No</td>
<td>The &quot;Default contact e-mail address for the site&quot; field on the General System Settings page (see page 90). An entry in this field causes the &quot;Contact Us&quot; link to appear. Each store can have its own &quot;Contact Us&quot; e-mail address. For more about how this link can change on store pages, see &quot;Bottom Navigation Menu for Stores&quot; on page 65.</td>
</tr>
</tbody>
</table>

*Can be configured separately for stores in single-store mode (see page 73).

### What Do the Bottom Navigation Links Do?

<table>
<thead>
<tr>
<th>Link Name</th>
<th>What happens when the link is selected?</th>
<th>Can the info page be edited?</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site Info</td>
<td>A modal window appears that contains the Site Info page.</td>
<td>The Site Info page can be customized by using the Site Info HTML field on the General System Settings page (see page 90).**</td>
<td>The Site Info page can be used to display basic information about the site or about how to use the site.</td>
</tr>
<tr>
<td>Link Name</td>
<td>What happens when the link is selected?</td>
<td>Can the info page be edited?</td>
<td>Comments</td>
</tr>
<tr>
<td>---------------</td>
<td>----------------------------------------</td>
<td>------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Privacy Policy</td>
<td>A modal window appears that contains the Privacy Policy page.*</td>
<td>The Privacy Policy page can be customized by using the Privacy Text HTML field on the General System Settings page (see page 90).**</td>
<td>The Privacy Policy link page displays information about the campus policy toward user privacy. TouchNet strongly recommends that you develop policies regarding the privacy of shoppers’ data and the use of unsolicited bulk e-mail.</td>
</tr>
<tr>
<td>Help</td>
<td>A modal window appears that contains the Help page.*</td>
<td>The Help page can be customized by using the Help HTML field on the General System Settings page (see page 90).**</td>
<td>The Help page displays information about how to use the site.</td>
</tr>
<tr>
<td>Accessibility</td>
<td>A modal window appears that contains the Accessibility page.*</td>
<td>The Accessibility page can be customized by using the Accessibility HTML field on the General System Settings page (see page 90).**</td>
<td>The Accessibility page displays information about the campus policy toward user accessibility. TouchNet strongly recommends that you develop policies regarding user accessibility.</td>
</tr>
</tbody>
</table>
### Contact Us

<table>
<thead>
<tr>
<th>Link Name</th>
<th>What happens when the link is selected?</th>
<th>Can the info page be edited?</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Us</td>
<td>A new message is opened in the customer's default e-mail client</td>
<td>Not applicable.</td>
<td>When shoppers select the Contact Us link, their default e-mail software application will be launched so that the shopper can send a message to the uStores contact e-mail address.</td>
</tr>
</tbody>
</table>

*Can also be configured with a URL to launch a web page in a separate browser window. This web page may exist on any web server that is accessible to your customers.*

**Can be configured separately for stores in single-store mode (see page 73).**

The bottom navigation menu contains additional links when store pages are displayed. For more about the bottom navigation menu for stores, see "Bottom Navigation Menu for Stores" on page 65. And parts of the bottom navigation menu are optional and customizable for stores in single-store mode. For more about the bottom navigation menu for stores in single-store mode, see "Optional Page Elements" on page 73.
Modal Windows

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

Modal windows are used to display additional site information.

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

- Site Info
- Privacy Policy
- Help
- Accessibility

For more about configuring the info pages that are displayed when these links are selected, see "Bottom Navigation Menu for the Mall" on page 33.

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

- Shipping Rates
- Return Policy

For more about configuring these store-level info pages, "Bottom Navigation Menu for Stores" on page 65.

Parts of the bottom navigation menu are optional and customizable for stores in single-store mode. For more about the bottom navigation menu for stores in single-store mode, see "Optional Page Elements" on page 73.
Special Announcements

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

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

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

![Image of mall home page](image)

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

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

Home Page Tabs

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

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

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

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

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

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

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

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

System Administration > Settings > Store Categories

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

System Administration > Settings > Product Categories

The system administrator can create as many store categories or product categories as necessary for your campus’s uStores mall.
About Building the Mall Home Page Tabs

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

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

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

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

Mall Style Sheets

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

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

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

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

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

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

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

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

**Modifying background colors**
- Modifying the header background color
- Modifying the footer background color
- Modifying the background color of the top navigation menu
- Modifying the background color of the left navigation buttons
- Modifying the background color of the bottom navigation menu
• Modifying the main content background color
• Modifying the margin colors
• Modifying the width and color of borders

**Modifying link colors**

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

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

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

### 2.3 What Shoppers See: Product Categories

There are two types of product categories in Marketplace:

• Mall-level product categories — These product categories appear in the left navigation menu and include products from all stores in the mall.

• Store-level product categories — These product categories appear within individual stores. Each store has its own set of product categories. The product categories for a single store only show products for that one store.

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

In this section, we’ll discuss mall-level product categories. We’ll discuss store-level product categories in "What Shoppers See: Stores" on page 57.
events (sporting events, seminars, theatrical productions, etc.) can be placed in a category called "Events."

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

**System Administration > Settings > Product Categories**

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

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

![The thumbnails layout for a sample product category page.](image1)

![The detailed layout for a sample product category page.](image2)
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The name-and-price layout for a sample product category page.

Using a Product Category Side Banner

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

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

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

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

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

### 2.4 What Shoppers See: The Cart

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

**The Shopping Cart**

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

Here is a sample shopping cart page:

![Sample Shopping Cart Page](image)

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

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

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

The Additional Items page.

Additional Items page—By offering your shoppers additional items during checkout, you can help increase revenue by bringing special items to the attention of your customers. These items appear on the Additional Items page. This page will only appear if the cart contains products from a store that has been configured with one or more “additional items.” (For information about configuring products to serve as additional items, see “Editing Products” on page 250.)

The Delivery Method page.

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

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

The Payment Method page.

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

Payment Information page—This page allows the shopper to enter payment information for each payment method chosen on the Payment Method page. For orders that only contain items priced at zero, the Payment Information page will be skipped.

The Buyer Information Page.

Buyer Information page—This page contains fields that are customizable by each store. These fields allow stores to acquire additional information from the buyer in the form of required menu selections, text entries, and optional checkboxes selections. The Buyer Info page only appears if the cart contains products from a store that has been configured to ask for "user modifiers." (For information about configuring stores to ask for "user modifiers," see "User Modifiers (Buyer Info)" on page 214.)
2.0 What Shoppers See

The Review Order page.

Review Order page—This page summarizes the order information and allows the buyer an opportunity to confirm that the information is correct. The buyer is given the opportunity to change the delivery address and to edit the payment method information. In addition, users can view the return policy agreement. This page always appears during the checkout process.

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

![Image of Digital Download page](https://via.placeholder.com/150)

The Digital Download page.

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

2.5 What Shoppers See: My Account

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

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

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

Customers are also given the opportunity to register or login during the checkout process.
During checkout, registered users can login by using the fields in the Registered Users box in the far right column of the Delivery Address page. Also during checkout, new users can become registered users by clicking the Register Now button in the far right column.

My Account: Profile

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

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

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

My Account: Payment Methods

In addition to personal information, customers can save payment information to their My Account profile. This payment information can be for credit card transactions and bank account ACH transfers.
Chapter 2

The Payment Methods tab on the My Account page.

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

My Account: Memberships

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

The Memberships tab on the My Account page.
If the user group requires no authentication, the selected user group name moves to the My Memberships list box. If the user group requires authentication, the Membership Authentication page appears, which requires the user to enter a username and password for the group.

After a user is authenticated as a member of a user group, the selected user group name moves to the My Memberships list box. The user can now access any privates stores that require membership in this user group. Subsequently, the user must simply log in as a Marketplace registered user in order to use active memberships for accessing private stores.

The user groups displayed in the Available Memberships list box represent all the user groups established for your implementation of Marketplace. All Marketplace shoppers will see the same list of available user group memberships from which to choose.

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

My Account: Order History

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

The Order History tab on the My Account page.
The Order History Detail page gives detailed information on past orders.

My Account: Change Password

Registered customers can change their passwords by navigating to the Change Password tab of the My Account page.
To change their password, the customer must enter their current password as well as a new password (which must be confirmed). Passwords must be 6 to 20 characters long.

2.6 What Shoppers See: Stores

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

Store Layout

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

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

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

The following examples show the two layout options for stores:
The default store layout displays thumbnails for each store product category on the store home page. Select products can also be displayed as thumbnails on the store home page.

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

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

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

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

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

![Store Side Banner Example](image)

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

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

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

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

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

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

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

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

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

The thumbnails layout for a sample store product category page.
Using a Category Side Banner

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

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

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

![Category Side Banner Example](image)

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

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


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

---

**Store Announcements**

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

Here is an example of the special announcement appearing on the default store layout:
With the default store layout, the special announcement appears above the store and category thumbnails.

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

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

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

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

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

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

By introducing new HTML to store home pages, you can potentially add major new elements to the store home pages that can enhance the shopping experience for your customers.
The bottom navigation menu for stores is similar to the menu displayed for the uStores mall; however, for stores, this menu contains two additional links: "Shipping Rates" and "Return Policy." Plus, the "Contact Us" link can be modified with the e-mail address of the store contact.

**Note:** For information about the standard links that appear in the bottom navigation menu (Site Info, Privacy Policy, Help, Accessibility, and Contact Us), see "Bottom Navigation Menu for the Mall" on page 33.

Here is an example of the bottom navigation menu:

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

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

### Bottom Navigation Links: What Do They Look Like?

<table>
<thead>
<tr>
<th>Link Name</th>
<th>Is the link optional?</th>
<th>Can the link text be customized?</th>
<th>Where can the link be configured?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shipping Rates</td>
<td>Only for stores in single-store mode.</td>
<td>No</td>
<td>No link configuration.</td>
</tr>
<tr>
<td>Return Policy</td>
<td>Only for stores in single-store mode.</td>
<td>No</td>
<td>Enable button and link text field on Store General Settings page.</td>
</tr>
<tr>
<td>Contact Us</td>
<td>No</td>
<td>No</td>
<td>Each store can have it's own &quot;Contact Us&quot; e-mail address by assigning the store contact role. The e-mail address that this user has configured in their Marketplace user profile will be used as the store's &quot;Contact Us&quot; e-mail address.</td>
</tr>
</tbody>
</table>
### Bottom Navigation Links: What Do They Do?

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

For information about the optional (and customizable) links in the bottom navigation menu for stores in single-store mode, see "Optional Page Elements" on page 73.

For information about modal windows, see "Modal Windows" on page 37.

### Product Layout

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

Here is a sample product page:

![Product Image]

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

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

**Using Store Banners**

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

Here is a sample product page for a store in which a store banner has been configured:
If a store side banner is used, it appears to the left of the product image on the product detail pages.

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

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

**Using HTML in the Product Description**

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

Here is an example of a product detail page that uses HTML in the product description.
By using HTML in the product description, you can provide shoppers with more robust product information.

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

2.7 What Shoppers See: Single-Store Mode

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

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

In addition, a store might have a branding strategy that is different than the strategy being used by the uStores mall. This strategy might involve using different fonts, different colors, and a different header image. This strategy might even involve making changes to the width of page elements or the position of those page elements. These types of changes are possible in single-store mode.
In this section, we’ll discuss the options available in single-store mode that affect what shoppers see. Some of these options simply require the use of settings in the Marketplace Operations Center. Other options require advanced skills, such as knowledge of HTML and CSS.

**Single-Store Example**

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

This store is displayed in single-store mode.

Compare this store with the following store, which appears as part of the campus’s uStores mall:
This store is part of the uStores mall.

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

Store managers may opt to take this approach in order to maintain the branding that store customers are accustomed to seeing. This branding may include the use of specific header images, font families, font sizes, font colors, background colors, and background images. Even additional page HTML and images may be necessary to maintain store branding requirements. These types of customizations are possible when using Marketplace’s single-store mode.

Navigating to Stores in Single-Store Mode

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

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

**Note:** For more about the Store-is-Viewable-In-Mall option, see "The Store-Is-Viewable-in-Mall Option" on page 176, and for more information about the Link-to-Single-Store-From-Mall option, see "The Display-the-Store-In-This-Mode Option" on page 176. For detailed information about store URLs, see "Linking to a Store" on page 225.
Stores in single-store mode do not have uStores mall’s left navigation menu (unless the Store-Is-Viewable-In-Mall option has also been turned on). The left navigation menu disappears when single-store mode is turned on.

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

This store is part of the uStores mall.

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

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

**Note:** For more about building a new left navigation menu for a store in single-store mode, see "The Header, Left Nav, and Footer Fields" on page 77.

### The Home Button

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

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

In some instances, however, store managers may wish to reap the benefits of placement within the uStores mall while also maintaining a standalone store front. These store managers can use the Store-Is-Viewable-In-Mall option, as described in "The Store-Is-Viewable-in-Mall Option" on page 176.

### Optional Page Elements

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

Here is a sample page with optional page elements:

```
Campus Wear

Shopping Cart

These page elements are optional.

Items in your Shopping Cart

- Item Name
- Item Number
- Store Name
- Store Location
- Store Number
- Store Address
- Store Phone
- Store Email
- Store Website
- Store Contact

Shipping Details

- Shipping Method
- Shipping Address
- Shipping Phone
- Shipping Email
- Shipping Website
- Shipping Contact

These page elements are optional and customizable.
```

The red ellipses show the optional page elements.

Store managers can show/hide optional page elements by going to the Single Store Settings page of the Operation Center.
Here is a list of the optional page elements for single-store mode:

- **Quantity Column**—In the shopping cart, as well as the checkout pages, a column for "Quantity" appears. This column indicates the quantity of each item that the customer is ordering. If this field is irrelevant for your store, you can remove this column.

- **Promotional Code Field**—(Not shown above) During the checkout process, a field for entering a promotional code appears. If this field is irrelevant for your store, you can remove the promotional code field.

- **Shipping Rates Link**—In the bottom navigation bar of Marketplace uStores, a link for "Shipping Rates" appears. If this link is irrelevant for your store, you can remove this link. When shoppers select the Shipping Rates links, a web page is displayed that shows the applicable shipping rates for the store that the shopper is viewing. The shipping rate page is generated automatically based on the configured shipping classes and shipping rates for the store.

- **Return Policy Link**—In the bottom navigation bar of Marketplace uStores, a link for "Return Policy" appears. If this link is irrelevant for your store, you can remove this link. When shoppers select the Return Policy link, a web page is displayed that provides information about the store’s return policy. TouchNet strongly recommends that each store develop a return policy. For more information, see "General Settings" on page 150.

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

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

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

- **Help Link**—When shoppers select the Help link, a web page is displayed that provides help information about how to use the site.

- **Accessibility Link**—When shoppers select the Accessibility link, a web page is displayed that provides information about the campus policy toward user accessibility. TouchNet strongly recommends that you develop policies regarding user accessibility.
By turning on/off the display of these page elements for a store in single-store mode, the store manager can make the store better meet the expectations of its intended audience.

For information about turning on/off the optional page elements, see "Single-Store Settings" on page 166. For more information about using alternative text with the Privacy Policy, Help, and Accessibility links, see "Alternate Text Fields" on page 75.

Alternate Text_fields

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

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

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

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

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

- **Alternate "Add to Cart" Text**—On product detail pages (as well as on product category pages that use the "detailed" layout), the words "Add to Cart" appear on buttons. A store manager setting up a store for taking conference registrations might choose to change this text to "Register Now," while the alternate text "Make a Donation" might be more appropriate for a store that takes alumni donations.

- **Alternate "Shopping Cart" Text**—At various places in the Marketplace shopping application, the words "shopping cart" appear. A store manager setting up a store for taking conference registrations might choose to change this text to "Pending Registrations," while the
Chapter 2

alternate text "Pending Gifts" might be more appropriate for a store that takes alumni donations. (Your entry in this field will also replace instances of "My Cart" in the top navigation bar.)

- **Alternate "Continue Shopping" Text**—As part of the Shopping Cart page, a "Continue Shopping" button appears that allows customers to return to the store they were shopping in previously. A store manager setting up a store for taking conference registrations might choose to change this text to "Additional Registrations," while the alternate text "Make Another Donation" might be more appropriate for a store that takes alumni donations.

- **Alternate "Check Out" Text**—The Shopping Cart page includes a "Check Out" button that can be used to initiate the checkout process. A store manager setting up a store for taking conference registrations might choose to change this text to "Complete the Registration Process," while the alternate text "Complete Your Donation" might be more appropriate for a store that takes alumni donations.

- **Alternate "Order" Text**—At various places in the Marketplace shopping application, the word "order" appears. A store manager setting up a store for taking conference registrations might choose to change this text to "Reservation," while the alternate text "Donation" might be more appropriate for a store that takes alumni donations.

- **Alternate "Buyer" Text**—At various places in the Marketplace shopping application, the word "buyer" appears. A store manager setting up a store for taking conference registrations might choose to change this text to "Registrant," while the alternate text "Donor" might be more appropriate for a store that takes alumni donations.

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

**Header Image**

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

Here is an example of a store in single-store mode that has been customized with a header image:
A sample store with its own header image.

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

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

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

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

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

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

The Header, Left Nav, and Footer Fields

Extra HTML can be added to stores in single-store mode. This HTML can be used for a wide range of purposes: for example, you can add additional text to store headers, you can add additional images, you can add navigation buttons, you can add informational tables, and you can add contact info to the footer. You can make these changes and many more edits. The limit is your own imagination.
Important! The use of HTML in the header, left navigation and footer fields requires knowledge of CSS and HTML. We strongly recommend that only experienced web designers attempt to make these edits. Improperly formatted CSS or HTML may prevent customers from using stores. Please see the Marketplace uStores Layout Guide for more information about using the single-store mode’s HTML fields.

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

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

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

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

![Example Store with Extra HTML](image)

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

And this example points out where the extra HTML is located in the previous example:
These callouts point out where HTML was added to this store page.

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

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

For more information about single-store style sheets and CSS, see "Single-Store Style Sheets" on page 79.

**Single-Store Style Sheets**

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

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

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

For example, you can choose whether the site should be centered or left justified. You can choose whether the header and footer should span the entire browser window or be limited to a set pixel width. You can change background colors, font families, font sizes, link colors, and many other page elements.
Important! Any major changes to the style sheets should be performed by an experienced web designer. Faulty CSS code can cause stores to stop loading correctly in the web browsers of your customers.

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

The style sheets have been modified for this store.

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

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

**Modifying background colors**
- Modifying the header background color
- Modifying the footer background color
- Modifying the background color of the top navigation menu
- Modifying the background color of the left navigation buttons
• Modifying the background color of the bottom navigation menu
• Modifying the main content background color
• Modifying the margin colors
• Modifying the width and color of borders

Modifying link colors

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

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

For more information about editing style sheets, see the Marketplace uStores Layout Guide.
Part 3:

Administrative and Merchant Setup
3.0 Administrative and Merchant Setup

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

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

<table>
<thead>
<tr>
<th>Administrative settings</th>
<th>How is system administrative setup used by ...</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>uStores?</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>uPay?</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>User settings</td>
<td>Various user types can be established, including chief administrators, administrators, merchant managers, and accountants. User groups and user authentication can be established.</td>
</tr>
<tr>
<td></td>
<td>uPay?</td>
</tr>
<tr>
<td></td>
<td>Various user types can be established, including chief administrators, administrators, merchant managers, and accountants.</td>
</tr>
<tr>
<td>Merchants</td>
<td>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.</td>
</tr>
</tbody>
</table>

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

You must complete the administrative settings before you bring any part of your Marketplace site online. Later, and over time, you can return to each setup choice and fine-tune your ideas.
A Note to Users of General Ledger Systems

If you’ll be transferring data from Marketplace to a general ledger (GL) system, you have special setup fields and tasks. In particular, you must set up the account codes for tax revenue before store managers can finish adding products. In this section, we describe the general ledger fields you’ll encounter during setup. See "General Ledger Information" on page 443 for the basics of general ledger setup.

A Note to Those Not Using General Ledger Systems

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

3.1 Planning Ahead

Administrators completing the global setup of Marketplace will find they need to make decisions as they move through the fields and options in the Operations Center.

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

Planning for Administrative Settings

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

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

The following planning summary discusses some of the main issues to be considered when planning for Marketplace.
## Planning Summary for Administrative Settings

<table>
<thead>
<tr>
<th>Shopping Site Basics</th>
<th>1. What should the shopping site be named?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2. Do we want to display links to categories on the home page?</td>
</tr>
<tr>
<td></td>
<td>3. Do we want shoppers to be in secure mode while browsing products?</td>
</tr>
<tr>
<td></td>
<td>4. Do we want shoppers to securely save their payment information and shipping address information for use in repeat visits?</td>
</tr>
<tr>
<td></td>
<td>5. Who is the site’s default e-mail contact for shoppers, in case there is no e-mail contact in a store?</td>
</tr>
<tr>
<td>Graphics</td>
<td>6. What should we use as our home page splash graphic?</td>
</tr>
<tr>
<td></td>
<td>7. What URL will we link to from our mall header image, if any?</td>
</tr>
<tr>
<td></td>
<td>8. Do we need standard graphics available for stores to use?</td>
</tr>
<tr>
<td></td>
<td>9. Who is going to create the graphics/images we need for our store?</td>
</tr>
<tr>
<td>Look and Feel</td>
<td>10. Should we customize the mall style sheet for campus colors, fonts, and other matters of look and feel?</td>
</tr>
<tr>
<td></td>
<td>11. Should we customize the checkout style sheet?</td>
</tr>
<tr>
<td></td>
<td>12. Do we need to make a standard set of supplementary style sheets available for all stores to use?</td>
</tr>
<tr>
<td>Categories</td>
<td>13. Will we use category links on the shopping site’s home page?</td>
</tr>
<tr>
<td></td>
<td>14. What product categories need to be created?</td>
</tr>
<tr>
<td></td>
<td>15. What store categories need to be created?</td>
</tr>
<tr>
<td>Delivery Methods</td>
<td>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.)</td>
</tr>
</tbody>
</table>
Chapter 3

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

Merchants

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

### Planning Summary for Merchants

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

### 3.2 System Administration Settings

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

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

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

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

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

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

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

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

**General Settings**
- **Shopping site name:** YouCampus Shopping
- **Default contact email address for the site:** gpmann@touchnet.com
- **Default Cashier ID:**
- **Default state/province:** Kansas
- **Default country:** United States
- **Default time zone:** Central Standard Time - America/Chicago (6:00)

**Host System configured in Payment Gateway:** Marketplace

**Admin Settings**
- **Require the security code for credit cards for stores:**
- **Require the pin number for campus cards for stores:**
- **Do a 11.00 credit card authorization for recurring payment schedule setup:**
- **Display main level product categories to shoppers:**
- **Checkout and My Account pages are secure (https):**
- **Shopping pages are secure (https):**
- **Allow buyer to save payment methods:**
- **Allow buyer to save shipping addresses:**
- **Show total number of reachable, orderable products rent to category links:**

**Invoice Me**
- **Payment Gateway User Defined Payment Method Id for Invoice Me:**
- **Text for Invoice Me:** Invoice Me

**Departmental Charge**
- **Use payment method Departmental Charge:**
- **User enters Detail Code:**
- **Payment Gateway User Defined Payment Method Id:**
- **Payment Method Detail Code:**

**Special Announcement**
- **Special announcement for shoppers (5,000 char max):**

**Email Messages**
- **Email Thank You Statement (500 char max):**

**ACH Agreement**
- **Text for stores ACH Agreement:**
- **Authorization Agreement for Electronic Payment (ACH Debit):**
  - *understand that payment(s) will be initiated once the order(s) have been submitted. I will be electronically notified when my order(s) has/are have been fulfilled. I authorize the following debit transaction(s) to my account(s) as listed below:*
Complete the following fields:

**General Settings**

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

**Default contact email address for the site**
In stores, shoppers see a link named "Contact Us" in the bottom navigation bar. When shoppers select this link, a new e-mail message will be created in their e-mail client--with the TO address that has been configured in this field.

If the store manager has not assigned the store contact user role, e-mail messages will go to the default address for the uStores site. If the e-mail contact address has not been established at either the store or administration level, then the "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 assign a store contact for their stores. Be sure to keep this e-mail address current.

**Default Cashier ID**
(Banner only) 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 state/province**
During checkout, a buyer enters shipping and billing addresses. The buyer selects the correct state from a drop-down list. The default state for address entry will typically be your home state, from which items are shipped.

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

**Default time zone**
The Default time zone field establishes the time zone that will be used for transactions, reports, and other Operations Center functionality.
Host system configured in Payment Gateway
This field is displayed for informational purposes only. This value cannot be changed. It was established during Payment Gateway setup.

Admin Settings

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

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

Do a $1.00 credit card authorization for recurring payment schedule setup
If you check this box, Marketplace will send a $1.00 credit card authorization when customers set up recurring payment schedules. This authorization temporarily encumbers the customer's credit card for $1.00.
By sending this $1.00 credit card authorization, you confirm that the credit card has a valid number and can be encumbered for at least $1.00. After the credit card is authorized, Marketplace immediately reverses the $1.00 encumbrment.

Display mall level product categories to shoppers
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.

"Checkout and My Account pages are secure" and "Shopping pages are secure"
These checkboxes set the point when your shoppers switch to secure mode while shopping. You can check either or both boxes. TouchNet strongly recommends that you always provide security on the checkout and My Account pages.
If you check the "Checkout and My Account pages are secure" box, shoppers enter secure pages whenever they check out or view their account information. This provides security on personal and payment information.
If you check the "Shopping pages are secure" box, shoppers enter secure pages as soon as they begin to browse in stores or categories. This provides security on all of the shopper's browsing, but will slow site performance for the shopper.
**Note:** For some secure pages to work, your web server must have a valid SSL certificate installed.

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

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

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

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

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

**Show total number of reachable, orderable products next to category links**

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. Neither will this number appear on the Product Category tab on the mall home page.

---

**Invoice Me**

**Payment Gateway User Defined Payment Method ID for Invoice Me**

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.

**Text for Invoice Me**

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

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

**User enters Detail Code**
(Banner by Ellucian only) If this checkbox is selected, the buyer must enter a Banner detail code during the checkout process in order to complete the transaction. If this checkbox is not selected, the buyer must instead enter a Banner FOPAL code.

**Payment Gateway User Defined Payment Method ID**
(Banner by Ellucian only) In order for "departmental charge" to be used, configuration in Payment Gateway must first take place: a user-defined payment method must be created. The ID for this user-defined payment method must then be recorded in this field.

**Payment Method Detail Code**
(Banner by Ellucian only) A Banner detail code must be entered in this field if the "User enters Detail Code” checkbox has not been selected.

Special Announcement

**Special announcement for shoppers**
This message appears on your uStores site’s home page. You may want to plan your special announcements around individual stores, promotions, products, or seasonal advertising.

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

HTML entered in this field must be properly formatted. It will undergo a validation process and any improperly formatted HTML will not be accepted. We recommend you become proficient in authoring HTML before you attempt to add HTML to this field.
**Important!** In order to ensure that Marketplace remains a secure environment for processing commerce transactions, fields that accept HTML in the Operation Center will not accept HTML form tags, iframe tags, object tags, and some additional code—including JavaScript.

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

**Email Messages**

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

**ACH Agreement**

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

| Text For Return Policy: | Return Policy |

### Site Info Settings

| Enable Site Info Link: | Yes | No |

| Site Info Text (50,000 chars max): (HTML Allowed) |

### Privacy Link Settings

| Enable Privacy Link: | Yes | No |

| Site Info Link URL: |

| Privacy Text (50,000 chars max): (HTML Allowed) |

### Help Link Settings

| Enable Help Link: | Yes | No |

| Help Link URL: |

| Help Text (50,000 chars max): (HTML Allowed) |

### Accessibility Link Settings

| Enable Accessibility Link: | Yes | No |

| Accessibility Link URL: |

| Accessibility Text (50,000 chars max): (HTML Allowed) |

*HTML can be used in the Privacy, Help, and Accessibility text fields.*
Return Policy Settings

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

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

This field is NOT for the body text that appears for customers as the Return Policy Agreement (either on the Review Order page of the checkout process or on the Return Policy Agreement modal window). The body text for the Return Policy agreement is maintained on the General Settings page of stores, as described in "General Settings" on page 150.

Site Info, Privacy Link, Help, & Accessibility Settings

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

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

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

Text for [Site Info/Privacy/Help/Accessibility] Link
The text for the Privacy, Help, and Accessibility links can be customized to meet the meetings of your installation of Marketplace. The alternate text that you enter in these fields will appear in the bottom navigation menu in uStores.
[Site Info/Privacy/Help/Accessibility] Link URL
An entry in the [Privacy/Help/Accessibility] URL field determines what happens when the shopper selects the corresponding link in the bottom navigation menu of uStores. If an entry is made in this field, a separate browser window will be used for loading the web page targeted by the URL. If no entry is made in this field, the entry in the [Privacy/Help/Accessibility] Text field will be displayed in a modal window.

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

[Site Info/Privacy/Help/Accessibility] Text
You can maintain the privacy policy page, the help page, and the accessibility page by using these fields.

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

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

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

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

QR Code Management for Mall Home Page
The QR Code Management page allows you to generate a QR code that can be downloaded for use on printed material. The QR code represents a URL for the Marketplace 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.

To generate and download a QR code, follow these instructions:
1. In the left navigation menu, go to Marketplace Home > System Administration > Settings > General. The Store 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.

**Images**

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

   The uStores Images page opens (shown below).

   **Note:** Only an administrator can upload uStores site-level images.
2 In the Splash Image section, click the "Upload Splash Image" link. A pop-up Image Upload box opens.

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

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

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

   **Note:** The header image will appear in the header of all Marketplace uStores pages.

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

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

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

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

**Note:** For an example of using a splash image and a header image, see "What Shoppers See: The Mall" on page 28.

**Image Specifications**

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

**More About Header Images**

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

```
[Image of header area]
```

The mall header image appears in the header area.

The header area is 960 pixels wide. The mall header image appears flush left within the header area. If you have uploaded a header image that is less than 960 pixels wide by 100 pixels high (which is the recommended size), you will see part of the background that has been applied to the header area. By default, the background color of the header area is white. This background color can be changed by editing the `marketplace.css` style sheet. For more about downloading and uploading style sheets, see "Mall Style Sheets" on page 123.

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

```
[Image of header area with smaller image]
```

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

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

- Upload a new header image that is 960 pixels wide by 100 pixels high.
- Upload a new header image that uses a transparent background. This will allow the header's background to show through the transparent portion of the header image, which will make the header image blend into the header area.
- Edit the style sheet so that the header background color blends into the mall header image.
Important! Upon upgrade from Marketplace 5.x to <MadCap:variable name="MyVariables.ProductNumber" />, the header size is increased from 800 pixels wide to 1024 pixels wide. We recommend that you view uStores in a browser soon after the upgrade and then take one of the actions described above so that the header image and header background work well together.

Store Categories

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

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

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

Note: For an example of store categories in the left navigation menu, see "Left Navigation Menu" on page 30.

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


2. Click the Add Store Category link. The Add Store Category page appears.
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 150.

Store Category Tips

• Check with store managers to hear what store categories would help them most. Also, tell store managers when new store categories are added or changed so they can make sure stores are in the right categories.

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

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

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

Managing Store Categories

You can edit a store category name by clicking the Edit link of the corresponding category. You can then edit the store name and upload a store category logo.
A store category thumbnail image can be uploaded with the Edit Store Category page.

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

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

### Deleting a Store Category

On the Store Categories page, you can remove a store category by clicking the Delete button of the corresponding category. Over time, you may find that some categories do not help the shopper as much as others. You may need to delete some categories as you add others.

### Mall Product Categories

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

If you chose in your general settings to display category links, then store managers can showcase products in product categories.

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

These categories are listed in the left navigation menu of the mall home page and in the tabbed section on the uStores mall home page. For examples of the product category pages, see "Product Categories Layout" on page 42.

**Note:** Only an administrator can set up uStores product categories.
To set up system-level product categories, follow these steps.


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

3. Enter your category or subcategory name.

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

5. Click Save.

**Choosing Product Layouts**

The category’s product layout determines how shoppers view the list of products. Choose the best layout for each category and its products. To choose a product layout, think about the kinds of products and how many products are in the category. For examples of the product category layout pages, see "Product Categories Layout" on page 42.

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

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

**Adding Category Graphics and Changing Category Features**

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

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, and the Category Logo.

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

3. Change the category name or product layout as needed.
4 If you would like to add a Side Banner to this category, click the Upload Side Banner button, browse to your image file, and then click the Upload Now button.

**Note:** The category side banner appears at the left side of the uStores category pages. For more about category logos, see "Product Categories Layout" on page 42.

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

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

**Image Specifications**

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

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

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

**Category Design Tips**

- Check with Store Managers to hear what category choices would help them most. Also, tell Store Managers when system-level categories are added or changed so they can make sure products are in the right categories.
- If a category is empty, shoppers won’t see its link in the site. You can add empty categories while you are figuring out the best structure for your site, then remove unused categories later.
- Avoid giving a category the same name as a store. If category names and store names are the same, navigation may be confusing for shoppers.
• Category layout can improve navigation. For example, a category that includes products with no images might require the Name and Price layout.

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

Manage the Category Listing Order

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

To change the listing order:

1. Go to Marketplace Home > System Administration > Settings > Product Categories, and click the Product Category List link.

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

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

3. Click the Save button.

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

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

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

Linking to a Product Category

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

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

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

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

Note: Do not include bracket characters in the URL.

QR Code Management for Product Category Pages

The QR Code Management page allows you to generate a QR code that can be downloaded for use on printed material. The QR code represents a URL for the Marketplace 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.

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.

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.

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**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.

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

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

4. Click the OK button.

### Tip on Delivery Methods

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

### Editing Delivery Methods

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

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

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

**Deleting Delivery Methods**

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

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

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

**Accounting Codes**

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

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

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

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

**Adding Accounting Codes as an Administrator**

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

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

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

4. Click the Add button.

**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.

**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 113.) For other details on accounting codes, see "General Ledger Information" on page 443.

To assign a tax account code:

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

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

3. Click the Save button.

**About Tax Classes and Tax Rates**

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

**Note:** The higher tax rate is not available with the Marketplace tax service (introduced in Marketplace 6.5). For more about tax methods, see "Tax Configuration" on page 143.

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

**Store Listing Order**

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

To change the order in which stores are listed:

1. In the left navigation menu, go to Marketplace Home > System Administration > Settings > Store Listing Order. The Store Listing Order screen opens.
2 In the Sort Key column, use two-digit numbers to show the order you want the categories to appear.

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

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

3 Click the Save 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.

Field definitions:

Mall Allocation information

Total Size Available for Digital Files
The Total Size Available for Digital Files field displays the total space available for all digital products in all stores. The total file space for digital files is determined by the `critical.prp` file. By default, this value is set at 10,000,000 bytes (10 MB). If you would like to change this limit, you must
edit the *critical.prp* file. See the *Marketplace 6.5 Install Guide* for more information about editing the *critical.prp* file.

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

**Total Amount Used By All Stores**
The total amount currently used by all the Marketplace stores. This figure is a sum of all the values in the "Size of Files" column.

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

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

**Merchant Allocation Information**

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

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

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

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

**Total Allocated For Store Use**
The total amount of server space that is available to an individual store for digital files.

**Text Messaging**
Administrators must set up the basic configuration for text messaging by entering the carrier names and the carrier URLs. This information is maintained on the Text Messaging page.
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 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 164.

**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. Administrators can enter a date on the Registered User Maintenance page and all payment profiles that have not been used since that date will be deleted.

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

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

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

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

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

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

Cache Settings

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

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

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

If a buyer browses to a product or "Item for Sale" available in the cache, Marketplace can retrieve this information from memory rather than from the database.
Products and "Items for Sales" that are frequently viewed by buyers are more likely to be available from this cache, decreasing the time required for a buyer to view information about a popular selection.

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

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

**Note:** Only an administrator can change cache sizes.

To change cache sizes, follow these steps:

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

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

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**TouchNet Marketplace 6.5 User’s Guide**

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Understanding Cache Statistics

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

In general, if your hit ratios are relatively high over time, buyers are likely to be able to retrieve the most-requested product and "Item for Sale" data from the cache, which is faster than retrieving it from the database. However, a high hit ratio alone does not indicate site efficiency.

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

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

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

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

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

**Field definitions:**

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

**# of Products in Cache**
The number of different products or "Items for Sale" that have been added to the cache as a result of buyers browsing to these products.
Total # of Requests
The number of requests made to the cache. This is the number of times buyers have browsed to products in your shopping site (or to "Items for Sale").

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

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

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

Cache Hit Ratio
The ratio of cache hits to all cache requests.

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

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

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

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

**Important!** Any major changes to the mall style sheets should be performed by an experienced web designer. Faulty CSS code can cause the mall to stop loading correctly in the web browsers of your customers.
System administrators can download and upload style sheets that determine the look-and-feel of the uStores mall by using the Mall Style Sheet Settings page in the System Administration section of the Operation Center:

**System Administration > Settings > Style Sheets**

The Marketplace Style Sheets page then appears.

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

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

- **Main Style Sheet**—The main style sheet controls how the mall and stores are displayed. You can download this style sheet. Your revised version of the style sheet can be uploaded. After you have uploaded a revised style sheet, you can then activate the style sheet by choosing the radio button for the revised style sheet. You can also revert to the default main style sheet. (Required filename: `marketplace.css`.)

- **Cart Style Sheet**—The cart style sheet controls how the cart and checkout pages are displayed. You can download this style sheet. Your revised version of the style sheet can be uploaded. After you have uploaded a revised style sheet, you can then activate the style sheet by choosing the radio button for the revised style sheet. (Required filename: `checkout_stylesheet.css`.)

- **Supplementary Style Sheets**—The system administrator can also upload up to five supplementary style sheets as necessary. These style
sheets for various purposes. They might be used to provide new styles for use with HTML added via the mall "special announcement" field or the product descriptions that appear on uStores product detail pages.

Modifying Style Sheets

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

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

   Your browser’s save window will then appear.

2. Save the file.

3. Open the downloaded style sheet in the editor of your choice.

4. Edit the styles as necessary.

   Your browser’s save window will then appear.

5. Save the style sheet.

6. Use the following file names:
   - The main style sheet must be named `marketplace.css`.
   - The cart style sheet must be named `checkout_stylesheets.css`.

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

7. Click the Upload button for the corresponding style sheet type.

   The Marketplace CSS Upload window appears.

8. Click the Browse button and locate the style sheet that you modified.

9. Click the Upload Now button.

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

**Important!** To ensure that Marketplace remains a secure environment for processing commerce transactions, some commonly used CSS code is not allowed in uploaded style sheets. For critical information about the validation process, see "Validation of Style Sheets" on page 126. And for a complete list of all allowed CSS, see the Marketplace uStores Layout Guide, which can be downloaded from the TouchNet Client Community.
**Important!** For critical information about the validation process, see "Validation of Style Sheets" on page 126.

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

11 Click the Save button.

**Using Supplementary Style Sheets**

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

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

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

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

Like the main style sheet, supplementary style sheets must pass a validation process before they can be uploaded. For more information about the validation process, see "Validation of Style Sheets" on page 126.

**Validation of Style Sheets**

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

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

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

- Position attributes with values of "absolute" or "relative"
- JavaScript
- Comments
- And any other code that TouchNet determines may potentially represent a security threat.
If any code in your style sheet does not pass the validation process, Marketplace will prompt you to edit the corresponding lines of your style sheet.

**Important!** The default uStores style sheet includes a comment at the beginning of the file. This comment identifies the file version. When you download this style sheet, this comment is included in the style sheet. Before you can successfully upload your edited uStores style sheet, you MUST remove this comment.

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

### Style Sheet Image Management

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

**Marketplace Home > System Administration > Settings > Style Sheets**

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

![Style Sheet Image Management](image)

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

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

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

To upload an image, follow these instructions:

1. Select the Upload Image button.
   
The Marketplace Image Upload window then appears.
The Marketplace Image Upload window allows for a single image to be uploaded.

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

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

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

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

### 3.4 Administrative Users

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

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

The following descriptions summarize what each administrative user can do.
# Administrative User Roles

<table>
<thead>
<tr>
<th>User Role</th>
<th>What They Can Do</th>
</tr>
</thead>
</table>
| 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  

**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 and administrators.

<table>
<thead>
<tr>
<th>Administrator</th>
<th>• An administrator can do everything a chief administrator can, except add other chief administrators and administrators.</th>
</tr>
</thead>
</table>
| Accountant    | • Review the Revenue by Merchant report.  

**Note:** An accountant cannot make any changes to settings or assign user roles.
### User Role

<table>
<thead>
<tr>
<th>User Role</th>
<th>What They Can Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>Merchant manager</td>
<td>• Manage general merchant settings</td>
</tr>
<tr>
<td></td>
<td>• Grant the store manager and uPay site manager user roles to other users</td>
</tr>
<tr>
<td></td>
<td>• Add stores and uPay sites for the assigned merchant</td>
</tr>
<tr>
<td></td>
<td>• Edit general settings for stores created under the assigned merchant</td>
</tr>
<tr>
<td></td>
<td>• Add accounting codes and assign the accounting code used for taxes</td>
</tr>
<tr>
<td></td>
<td>• Review Marketplace financial reports</td>
</tr>
</tbody>
</table>

### 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 130.

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

### 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 188, and for information about how to edit uPay site user roles, see "Editing uPay Site User Roles" on page 429.

When you make changes to users, you should keep the following two points in mind:

- Always notify users when you change their roles.
- After a user's roles have been changed, the user must log out and log back in to see any changes in the Marketplace Operations Center.

**Note:** Each user can have multiple roles. For example, a merchant manager can also be an administrator or an accountant. Each merchant manager can manage multiple merchants.
Chief administrators and administrators should follow these steps for editing users at the administrative level:

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

2. Look through the list of users for the one you would like to edit. If you do not see the user that you would like to edit, click the "View U.Commerce Users" button to see all U.Commerce users (even those who have not yet been granted Marketplace roles).

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

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

4. To add a role, click the checkbox for that role.
Note: Only chief administrators can edit other chief administrators or administrators. Administrators can edit accountant and merchant manager roles.

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

User Groups and User Authentication

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

- Everybody. All shoppers are part of the "Everybody" group. It does not require a special login from the shopper.
- Registered Users. Any shopper who sets up a Marketplace profile automatically becomes part of the "Registered Users" group.

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

Store managers can subsequently decide that only a certain user group can have access to this store.

For instructions on how to add a new user group and establish user authentication, go to "User Groups and Private Stores" on page 301.

For instructions on how to create a link from another campus application into uStores using group logins, go to "How to Link to Marketplace with Group Logins" on page 308.

3.5 Merchants

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

Marketplace allows stores and uPay sites to be grouped into a logical structure. Each merchant in Marketplace can have one or more stores and one or more uPay sites. Before stores or uPay sites can be created, a Marketplace administrator must create one or more merchants. When each store or uPay site is created, it is created as belonging to a merchant.

Settings are associated with this merchant that affect its stores and uPay sites.

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

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

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

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

Adding Merchants

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

Note: Only chief administrators and administrators can add merchants.

1. From the left navigation menu, navigate to Marketplace Home > System Administration > Merchants > Add New Merchant. The Add New Merchant page appears.
2 Complete the fields.

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

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

  **Important!** Be sure you select the appropriate host system account when you add a merchant because this value cannot be changed after the merchant is established. Contact your Payment Gateway administrator for information about which Payment Gateway host system account is appropriate for the merchant.

- **Credit Card is authorized at order time**—(uStores only) Use this option in order to encumber the customer’s credit card at the time an order is submitted. By using this option, you determine if 1) the credit card information is valid and 2) sufficient funds are available.
- **Default Return Check Fee**—This fee affects returned checks for ACH transactions.

- **Wait period in days fulfiller must wait before fulfilling orders**—This wait period affects both purchases in uStores sites and refund requests in uPay sites.

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

- **Marketplace User**—When you set up a merchant, you must choose a merchant manager. All existing U.Commerce users appear in the Marketplace User dropdown menu.

3. Click the Submit button.

### Merchant Settings

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

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

![Merchant Settings](image)

2. You can edit the following fields.
• **Merchant Name**—This name is only used by the Operations Center. uStores shoppers and uPay customers will not see the merchant name.

• **Authorize Credit Card at Order Time**—Use this option in order to encumber the customer’s credit card at the time an order is submitted (during the uStores checkout process). By using this option, you determine if 1) the credit card information is valid and 2) sufficient funds are available. In addition, if auto authorization fails, the customer finds out immediately during the checkout process and can then re-examine the credit card information that they entered, thus reducing the opportunity for entry errors.

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

• **Wait period in days fulfiller must wait before fulfilling orders**—This wait period affects both purchases in uStores sites and refund requests in uPay sites.

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

3. Click the Save button.

**Note:** The Payment Gateway Host System Account Information displayed on the Marketplace Merchant Settings screen is for informational purposes only. You cannot change the host system account linked to a merchant. However, you can update Marketplace with the current payment information for the Host System Account—as stored in Payment Gateway—by clicking the Update Host System Account button on the Merchant Settings page. For more information, see “Updating the Host System Account” on page 136.

### Updating the Host System Account

In addition to the standard merchant settings, the payment information 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 in Payment Gateway for the Host System Account being used by the merchant, you will need to update Marketplace to use this new payment information. Any merchant manager can update the payment information by selecting the Update Host System Account button.

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

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

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

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

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

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

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

Merchant Accounting Codes

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

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

Note: Administrators and merchant managers both create accounting codes.

Adding Accounting Codes as a Merchant manager

1. In the left navigation menu, go to Marketplace Home > [Merchant Name] > Accounting Codes. The Merchant Accounting Codes screen opens.
2 The accounting codes listed in the Available Common Accounting Codes box were created by a Marketplace administrator. To make a common code available for use by the merchant and its stores, select the accounting code name and click the Add button.

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

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

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.
Editing Accounting Codes as a Merchant manager

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

1. In the left navigation menu, go to Marketplace Home > [Merchant Name] > Accounting Codes. The Merchant Accounting Codes screen opens.
2. Click the Edit link for any code in the list.
3. Update the Account Code or the Account Code Name fields as needed.
4. Click the Save button.

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 137. 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:

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

Adding Managers

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

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

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

**Note:** Only a merchant manager can add a store manager or a uPay 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 "View U.Commerce Users" button to see all U.Commerce users (even those who have not yet been granted Marketplace roles).

3 Click the Edit User link in the Action column of the user you would like to edit. The Edit User page appears.
On the Edit User page, look for the "Assigned as Merchant Manager" section and the name of the merchant for which you would like to name a merchant manager.

<table>
<thead>
<tr>
<th>Edit User</th>
<th>Add or remove user roles. The user will see changes at the next login.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back To Marketplace Users</td>
<td>Back To All Marketplace Users</td>
</tr>
</tbody>
</table>

**User Status**

- Status: Enabled

**User Information**

- U.Commerce Username: TNBV.gjohnson
- First Name: Gary
- Last Name: Johnson
- U.Commerce Email: gjohnson@touchnet.com
- Email: rsbl@vagrant@touchnet.com

**Marketplace Roles**

<table>
<thead>
<tr>
<th>Assigned Marketplace Roles</th>
<th>Available Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove</td>
<td>Add</td>
</tr>
<tr>
<td>[ ] Chief Administrator</td>
<td>- none -</td>
</tr>
<tr>
<td>[ ] Administrator</td>
<td></td>
</tr>
<tr>
<td>[ ] Accountant</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Assigned as Merchant Manager</th>
<th>Available Merchants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove</td>
<td>Add</td>
</tr>
<tr>
<td>[ ] Alumni</td>
<td>[ ] English Department</td>
</tr>
<tr>
<td>[ ] Athletics</td>
<td>[ ] Music Department</td>
</tr>
<tr>
<td>[ ] Student Union</td>
<td>[ ] Parking Passes</td>
</tr>
</tbody>
</table>

4. Select the checkbox for the merchant.

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

5. Click the Save button.

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

---

**Editing Managers**

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

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

2. Click the Edit User link to the right of the person for which you want to edit roles. The following page appears:
The Currently Store Manager Of column displays a list of the stores that the user is currently assigned to manage for this merchant. Additional store that can be assigned to this user are displayed in the Store Available To Manage column.

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

1. To assign a store or uPay site to the user, select the Add checkbox for that store or uPay site. To un-assign a store or uPay site from the user, click the Remove check box for that store or uPay site.

2. Click the Save Changes button.

### 3.6 Tax Configuration

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

<table>
<thead>
<tr>
<th>Tax Method</th>
<th>Pros</th>
<th>Cons</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Campus-maintained Tax Rates:</em></td>
<td>• 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.</td>
<td>• 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.</td>
</tr>
<tr>
<td><em>Marketplace Tax Service:</em></td>
<td>• 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.</td>
<td>• Only two tax rates are available: No tax and default tax (i.e., a higher tax rate is not available).</td>
</tr>
</tbody>
</table>
**Important!** By default, stores use the campus-maintained tax method (in which the campus is responsible for managing the tax rate files). Therefore it is important that the Marketplace administrator configure the campus-maintained tax rate files—or otherwise communicate with all store managers the importance of selecting the Marketplace tax service. If the administrator has not configured the tax rate files and a store manager has not selected the Marketplace tax service, then no tax will be withheld for that store.

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

**The location of the tax rate files**

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

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

- `city_county.dat`
- `taxrates.dat`.

These files can be found in this folder:

`touchnet\marketplace\sys\tmstax\data`

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

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

**Editing the city_country.dat file**

The `city_country.dat` file simply associates each city with its county in every state where you will charge tax. This information is used by Marketplace when customers enter their city name during the checkout process: Marketplace determines the city/county relationship as indicated in the `city_country.dat` and then calculates the appropriate tax rate using the corresponding city/county/state tax data contained in the `taxrates.dat` file.
The *city_county.dat* file contains a list of all cities in your state, identified by county.

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

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

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

3. Save and close the file.

**Example**

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

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

---

**Editing the taxrates.dat file**

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

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

**Important!** You should ensure the *taxrates.dat* file contains tax rates for the default delivery locations used by every store configured in Marketplace.

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

1. Use a text editor to open the *taxrates.dat* file.
2. Locate the state, county, or city for which the tax rate has changed. Entries for cities follow this format:

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

An entry for an entire county follows this format:

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

An entry for an entire state follows this format:

|STATE||lower tax rate|higher tax rate

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

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

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

- If a locale uses two tax rates, enter the lower of the tax rates first, followed by the higher tax rate.
- If a locale uses only one tax rate, enter the same rate in both tax rate fields.
- If a locale charges no tax, enter 0.0.

### Example 1

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

|NY|Albany||0.04|0.08

4 Save and close the file.

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

### Example 2

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

|NY||0.65|0.65

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

|NY|Albany||0.0725|0.0725

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

|NY|Albany|Altamont|0.0775|0.0775
Part 4:

Building and Managing Stores
4.0  Adding and Setting Up Stores

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

4.1  Adding a New Store

Stores are set up by merchant managers. Before setting up a new store, the merchant manager needs to have considered how the store will be configured. Here are some of the main questions to consider:

- What name should be used for the store?
- Who will be the store manager?
- What should the store’s return policy say?
- What should the store’s order e-mail messages say?
- Will the store use general ledger reporting? And if so, what accounting codes should be used? Should new accounting codes be created?

To add a new store, a merchant manager should follow these steps:


![Marketplace Add New Store](image)

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

3. To assign a store manager, select a U.Commerce user from the Marketplace User dropdown list. (All U.Commerce users are available in this list.)
4 Click the Add New Store button. The store is created and the General Settings page appears.

For more information about store general settings, see "General Settings" on page 90.

4.2 Store Settings

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

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

**Important!** Once a store is established, you must add at least one shipment class, as described in "Shipping Classes" on page 195. Without at least one shipment class, products cannot be added to the store.

General Settings

The process of configuring a store begins when a merchant manager creates a new store. After a store is created, the merchant manager can turn over the configuration of the store to a store manager.

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

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

The Store General Settings page then appears.
Complete the following fields:

**General Settings**

**Store Id**
This field displays the ID assigned to the store. You will need this ID number if you wish to determine the store’s URL before the store goes online. You will also need the Store ID value if your store uses single-store-only mode and the “Store is Viewable In Mall” option is set to “No.” (In this
case, you can only navigate to the store by using a store URL, which includes the Store ID value.) For more information about linking to a store, see "Linking to a Store" on page 225.

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

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

**Store Contact Email Address**
This e-mail address will be used when shoppers click the "Contact Us" link in the bottom navigation menu of uStores. The store manager should ensure that this e-mail address is appropriate for customers to contact.

**Store Status**
This field will say OFFLINE, ONLINE, or PREVIEW. The status of the store can be changed by selecting the Manage Status link. For more about managing the status of a store, see "Store Status Management" on page 160.

If a store is in preview mode, a link named "View" also appears in the uStore Status section. When you select this link, a new browser window is opened that displays the store.

![Preview mode allows you to see what shoppers will see.](image)

An orange status bar indicates that the store is being displayed in preview mode. You can navigate to categories and products within the store. You can leave preview mode by selecting the Exit Preview Mode button.
Stores in preview mode are not available for shoppers. Once a store is placed in preview mode, it can only be reached by using the preview link on the Store General Settings page.

Store Home Page Layout
Choose a Store Home Page Layout from the dropdown list. Two options are available:

- **Default**—The default store layout displays thumbnails for each store product category. Products can also be displayed as thumbnails on the store home page.

- **Splash**—The splash page layout combines a splash page image with text links for store product categories.

The following examples show the two layout options for stores:

![A screenshot of a store home page showing the default layout with product category thumbnails.]

*The default store layout displays thumbnails for each store product category on the store home page. Select products can also be displayed as thumbnails on the store home page.*
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The splash page layout combines a splash page image with text links for store product categories.

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

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

**Time Zone**

Select the time zone that should be used in conjunction with the enabling and disabling products. This field ONLY affects the enabling and disabling of products.

**Special Announcement**

**Special Announcement**

The Special Announcement appears on your store’s home page. Use it to let customers know about promotions, sales, store changes, etc. This field accepts HTML. For more information about the allowable HTML tags, see the *Marketplace uStores Layout Guide*.

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

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

### Email Messages

**Email Thank You Statement**
The Email Thank You Statement appears on e-mail messages generated to customers after orders have been placed. This statement appears as the first line of the e-mail message. This statement is also used as the first line of order cancellation e-mail message. Characters entered in this field will appear as text in e-mail messages.

**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.

**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.

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

**Email Refund Order Announcement**
The Email Refund Order Announcement appears on e-mail messages generated to customers after refunds have been issued. Use this announcement field to enter a paragraph that tells customers their refund request has been processed. Characters entered in this field will appear as text in e-mail messages.
More setting from the Store General Settings page.

**Donation Notification**

**E-mail 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.

**Digital Files**

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

**Total Size Available for Digital Files (in bytes)**
Displays the total file space designated for this store’s digital products. This value is set in the system administration setting. For more about this value,
see "Digital File Settings" on page 116. If your store needs more total file space for digital products, contact the Marketplace administrator.

Admin Settings

Allow Partial Refund
The refund process for each store can be set to either run in the standard mode (in which only complete refunds are allowed) or in the partial refunds mode (in which the fulfiller can enter a refund amount up to the total transaction amount). To use the standard refund mode, select No for the Allow Partial Refunds prompt. To use the partial refunds mode, select Yes. (For more about partial refunds, see "Processing a Refund" on page 320.)

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

Allow Recurring Payments On Donation Product Type
To allow donors to use recurring payments with donation products, select Yes. This option must be enabled before donation products can be configured to offer recurring payments.

Perform General Ledger Updates
This field only appears for merchant managers and store managers. By selecting this option, general ledger reporting is activated for the store. For more about general ledger reporting, see "General Ledger Information" on page 443.

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

Return Policy Settings

Return Policy
A link to the Return Policy page appears in the bottom navigation menu for store pages. When shoppers select the Return Policy link, a modal window is displayed that provides information about the store’s return policy. This text can be configured by using the Return Policy field. This same text also appears on the Review Order page of the checkout process.

TouchNet strongly recommends that each store develop a return policy. This policy should cover all of your store’s products. Note any individual differences as appropriate in the product descriptions.
This field accepts HTML. We recommend the use of `<h2>` tags for header text and `<p>` tags for body text. However, with the use of style sheet changes you can further modify the layout of return policy text.

Keep in mind that the HTML you enter in this field will appear on two different pages: 1) the Return Policy modal window and 2) the Return Policy Agreement section of the Review Order page during the checkout process. Therefore, any style sheet modifications will need to work for both pages.

For more information about the allowable HTML tags, see the *Marketplace uStores Layout Guide*.

**Note:** If the customer’s cart contains products from multiple stores, the return policies for all the corresponding stores will be displayed in the Return Policy Agreement section of the Review Order page of the checkout process. Likewise, the return policies will be combined on the Return Policy modal window (which appears when customers click the Return Policy link in the bottom navigation menu).

### 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 103. 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.
The QR Code Management page 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.

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. Scroll to the bottom of the page.

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

Save the file to the location of your choice.

4.3 Store Status Management

Store managers are responsible for managing whether stores are online or offline. Store managers can also delete stores. In addition, a store manager can place a store in preview mode.

Store managers can change the status of a store or schedule a status change by using the Store Status Management page. To view the Store Status Management page, go to Marketplace Home > [Merchant] > Stores > [Store] > Store Settings > Status Management. The Store Status Management page then opens.

The Store Status Management page allows you to schedule status changes.

**Before Bringing Your Store Online**

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

If you want to bring the store online before it’s fully finished, you may want to use a “coming soon” or “under construction” splash graphic or special announcement. (More details about splash graphics and special announcements follow in this section.)
Note: You can also use Single Store mode temporarily when you bring a store online. When stores are in Single Store mode, they can only be accessed by customers that have the URL for the store (or that use a link that leads directly to the store). When in Single Store mode, the store cannot be accessed from the Marketplace home page. When the store is ready to go live, simply remove the store from Single Store mode.

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

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

Important! By default, new stores are initially offline. After a store’s settings have been completed, you are ready to bring your store online by visiting the General Settings page for the store and choosing the Bring Store Online button. This procedure is described in see Section , "Updating the Current Store Status" on page 161. Unless you follow this procedure, your store will remain offline and unavailable to shoppers.

Updating the Current Store Status

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

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

In the Update Current Status section of the Store Status Management page, the Store Status dropdown menu contains the following choices:

- **ONLINE**—Once a store is brought online, the store is available for shoppers.

- **OFFLINE**—When a store is placed in offline status, 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.

To update the current status of a store, simply choose the corresponding selection from the Store Status dropdown menu. The choice that you make will immediately affect the availability of the store.
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 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.

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 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.


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 161.

3. Enter a date in the "Update Status Date" field (or select the calendar icon to choose a date using the calendar widget). If you enter a date, you must use this format: m/d/yy. For example, enter October 29, 2012 as 10/29/12.

4. Select an hour from the Update Status Hour dropdown menu. This dropdown shows hours in military time. For example, to choose 11 p.m. as the Update Status Hour, select 23.

5. Choose the Save Schedule button.

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

You can remove a scheduled status update by selecting the Delete History link.
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.

4.4 Text Messaging

Store managers determine the content of text messages sent to their customers. This information is maintained on the Automatic Message Content page.


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

There are four types of messages:

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

Note: In order for text messaging to be available for your customers, administrative setup must be done. This setup must be done in order to establish the text message carriers. You should check with a Marketplace administrator to determine if this setup has been completed. This administrative setup is described in "Text Messaging" on page 118.
To Edit Text Message Content

To edit text message content, click the Edit link of the corresponding message type on the Automatic Message Content page. The Edit Text Message Content page then appears.

The Edit Text Message Content is used for editing text message content.

The following customizations can be made for each text message type:

- **Subject Line**—This subject line will be assigned to the text message. Please keep in mind that many devices do not display the subject line and any characters devoted to the subject line are subtracted from the maximum character allotment (160 characters) of the text message.

- **Text Message**—This text will be sent as the body of the message. The total maximum number of characters for a text message is 160; however, 78 characters are reserved for the Detail lines (as described below) when all the Detail lines are used. This means the Text Message field is typically limited to 82 characters maximum.

- **Specific details that appear in the text message**—You can determine which details to send with the text message. This information includes customer name, store name, order ID number, and the dollar total. Use the checkboxes to determine which fields to include with your text messages.

As you enter text for the subject line and the text message AND as you select the specific order details to include in the message, the **Maximum characters left** field keeps track of how many characters remain available. A maximum of 160 characters can be sent in text messages, so you must
Chapter 4

pay attention to the number of characters that you are using. Marketplace will not allow you to exceed 160 characters.

4.5 Single-Store Mode

Marketplace provides opportunities for customizing stores through the use of single-store mode. These customizations can have a major impact on the customer experience, particularly the use of customized style sheets and optional HTML.

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

For examples of stores in single-store mode, see See "What Shoppers See: Single-Store Mode" on page 69.

Single-Store Settings

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

Complete the following fields:

**General Settings**

**Store Id**
This field displays the ID assigned to the store. You will need this ID number if you wish to determine the store's URL before the store goes online. You will also need the Store ID value if your store uses single-store-only mode and the "Store is Viewable In Mall" option is set to "No." (In this case, you can only navigate to the store by using a store URL, which includes the Store ID value.) For more information about linking to a store, see "Linking to a Store" on page 225.

**Store Name**
The Store Name appears in the Operations Center and in financial reports. You can change this value on the [store] General Settings page.
Use single store mode
To activate single-store mode, select the "Yes" radio button. Single-store mode allows you to establish stores that are not necessarily part of the uStores mall. Customization options are available for stores in single-store mode that are not otherwise available. These customizations involve look-and-feel options as well as modifications to selected button/link text. In addition, options are available for showing/hiding some of the page elements. For examples of using single-store mode, see "What Shoppers See: Single-Store Mode" on page 69.

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 225), 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 176.

When linking to a store in single store mode from the mall, display the following text in a pop-up message to indicate shoppers are leaving the mall
Only applicable when "Link to Single Store From Mall" is Yes.

Display Settings

Show Cart Quantity
In the Marketplace shopping application's Shopping Cart, as well as the checkout pages, a column for "Quantity" appears. This column indicates the quantity of each item that you are ordering. If this information is irrelevant for your store, you can have this column removed.
**Note:** The Show Cart Quantity field does NOT affect whether the store pages ask the customer to select a quantity of the product that they are ordering. Donation products and digital download products do not ask for the customer to select a quantity; however, the "generic" product type, which is typically used for physical products (hats, t-shirts, etc.) and events (such as event registrations), does ask for the customer to select a quantity.

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

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

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

**Show Store Header Image**
In the header area of stores in single-store mode, you can add an image that replaces the mall-level header image. If you choose the "Yes" radio button, be sure to use the [Store] Images page to upload a store header image, as described in "Images" on page 189.

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

### Alternate Text Settings

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

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

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

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

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

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

### Header
The text or HTML entered in this field will appear in the header area of the Marketplace shopping application. This text will only appear for stores displayed in single-store mode. 10,000 characters maximum.

### Left Navigation
The text or HTML entered in this field will appear in the left navigation area of the Marketplace shopping application. This text will only appear for stores displayed in single-store mode. 10,000 characters maximum.

### Footer
The text or HTML entered in this field will appear in the footer area of the Marketplace shopping application. This text will only appear for stores displayed in single-store mode. 10,000 characters maximum.
Note: HTML entered in the header, left navigation, and footer fields must be properly formatted. It will undergo a validation process and any improperly formatted HTML will not be accepted. We recommend you become proficient in authoring HTML before you attempt to add HTML to these fields. For more information about using HTML or CSS, please see the Marketplace uStores Layout Guide.

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

You can use HTML in the Privacy, Help, and Accessibility fields.
Return Policy Settings

Enable Return Policy
By default, the Review Order page of the checkout process displays the Return Policy Agreement for your store. However, if display of the Return Policy Agreement is not appropriate for your store, you can turn off the display of the Return Policy Agreement in uStores by selecting No for the Enable Return Policy option.

The Return Policy Agreement appears on the Review Order page of the checkout process. For uStores, you can turn off the display of the Return Policy Agreement.

The display of return policy is typically required by credit card regulations. However, if your store does not accept credit cards, or if the credit cards that you accept do not require the display of a return policy, then you may consider disabling the display of a Return Policy Agreement.

Important! Before you choose No for the Enable Return Policy option, we strongly recommend that you contact your credit card processor about credit card regulations and determine whether display of the return policy is required.

Use Mall Return Policy text
Instead of using the text configured in the Text for Return Policy field in single-store settings (see below), you can use the text configured for the mall on the General System Settings page.

Text For Return Policy
The words "Return Policy" appear in the bottom navigation menu for stores, as well as during the checkout process. If this language does not fit the needs of your store, you can use the "Text for Return Policy" field to enter alternative text.
Here is an example of the Return Policy section that will appear to customers on the Review Order page of the uStores checkout process.

This field is NOT for the body text that appears for customers as the Return Policy Agreement (either on the Review Order page of the checkout process or on the Return Policy Agreement modal window). The body text for the Return Policy agreement is maintained on the General Settings page of stores, as described in "General Settings" on page 150.

Privacy/Help/Accessibility Link Settings

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

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

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

Use Mall Settings for [Privacy/Help/Accessibility Link] Link
For the Privacy, Help, and Accessibility links, you can either use the settings that were established at the mall-level (in which case, select "Yes") or establish override values for the store (in which case, select "No"). For more about the mall-level settings, see "General Settings" on page 90.

If you select "No," the values you enter for the next three fields will be used. If you select Yes," the values for the next three fields are not used.

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

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

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

[Privacy/Help/Accessibility] Text
You can maintain the privacy policy page, the help page, and the accessibility page by using these fields.

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

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

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

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

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

• Operator ID
• Address Type
• Email Type
The Store-Is-Viewable-in-Mall Option

Stores in single-store mode can be optionally viewed as part of the uStores mall. This option allows a store to reap the benefits of placement within the mall: the store will appear in the mall’s left navigation menu (if the store has been assigned to a store category), the store will appear in the All Stores dropdown menu, and the store will appear on the All Stores tab on the mall home page. In addition, the products for these stores can be placed in mall product categories, and the store’s products can be located using the uStores search functionality.

For an example of a store that uses the Store-Is-Viewable-In-Mall, see "Single-Store Example" on page 70.

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 225.

The Display-the-Store-In-This-Mode Option

The "When viewable in mall, display the store in this mode" option is available if the "Store is Viewable in Mall" option has been set to Yes. The "Store is Viewable in Mall" option determines if a link to the store appears in the uStores mall, which allows a store to reap the benefits of placement within the mall. In turn, the "When viewable in mall, display the store in this mode" option then determines in which mode the store is displayed when shoppers navigate to the store from the mall—mall mode or single-store mode.

If this option is set to "Mall mode," the store will appear WITHOUT single-store mode customizations when customers navigate to the store via a link on the uStores mall, which has the effect of making the store look like a consistent part of the uStores mall—meaning the store loses button/link text changes, hidden page elements (which become visible again), extra HTML (added via the header, left nav, or footer fields), a store header image, and style sheet changes. The store will revert to using the mall’s layout for all store pages, including the shopping cart and checkout pages. In addition, the Home button will take the customer to the mall home page. In short, the store will look and function like a regular mall store. However, if a customer navigates directly to the store using the ",&SINGLESTORE=true"
URL option (as described in "Linking to a Store" on page 225), 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.

**Single-Store Style Sheets**

The style sheets for stores in single-store mode can be downloaded and uploaded by store managers.

Once a store manager has downloaded a store style sheet, the store manager can modify the style sheet and then upload and activate the style sheet for the store. Store managers can download and upload style sheets by going to the Single Store Settings page of the Operation Center:

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

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

**Important!** Any major changes to the style sheets should be performed by an experienced web designer. Faulty CSS code can cause stores to stop loading correctly in the web browsers of your customers.
Store managers manage style sheets by using the Style Sheet Settings page.

The following types of style sheets can be used by stores in single-store mode:

- **Main Style Sheet**—The main style sheet controls most styles that are needed for displaying your store’s home page, category pages, and product pages. You can download this style sheet, modify it, and then
upload your revised version of the file. Once you have uploaded a main style sheet, you must use the "revised" radio button to activate this style sheet. (Required filename: marketplace.css)

- **Cart Style Sheet**—The cart style sheet controls how your store's cart and checkout pages are displayed. You can download this style sheet, modify it, and then upload your revised version of the file. Once you have uploaded a cart style sheet, you must use the "revised" radio button to activate this style sheet. (Required filename: checkout_stylesheet.css)

- **Single Store Style Sheet**—The single store style sheet contains extra styles that are only used by stores in single store mode. You can download the default version of the single store style sheet, modify it, and then upload your revised version of this file. Once you have uploaded a single store style sheet, you must use the "revised" radio button to activate this style sheet. (Required filename: single_store.css)

- **Supplementary Style Sheets**—Up to five supplementary style sheets can be saved at the administrative level. These style sheets can be selectively used by all stores. These style sheets cannot be edited by store managers, only by administrators. Use the checkboxes to select which supplementary style sheets should be used with your store.

- **Additional Store Style Sheets**—You can upload up to five additional style sheets for use by your store. Use the checkboxes to select which additional store style sheets should be used.

**Modifying Style Sheets**

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

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

Your browser's save window will then appear.

2. Save the file.

3. Open the downloaded style sheet in the editor of your choice.

4. Edit the styles as necessary.

**Important!** To ensure that Marketplace remains a secure environment for processing commerce transactions, some commonly used CSS code is not allowed in uploaded style sheets. For critical information about the validation process, see "Single-Store Style Sheets" on page 177. And for a complete list of all allowed CSS, see the Marketplace uStores Layout Guide, which can be downloaded from the TouchNet Client Community.
5. Save the style sheet.

    Use the following file names:
    • The main style sheet must be named `marketplace.css`.
    • The cart style sheet must be named `checkout_stylesheet.css`.
    • The single store style sheet must be named `single_store.css`.

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

6. Click the Upload button for the corresponding style sheet type.

    The Marketplace CSS Upload window appears.

7. Click the Browse button and locate the style sheet that you modified.

8. Click the Upload Now button.

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

    **Important!** For critical information about the validation process, see "Single-Store Style Sheets" on page 177.

9. Select the corresponding "Revised" radio button in order to activate your modified style sheet.

10. Click the Save button.

### Using Additional Store Style Sheets

As an alternative to modifying the main style sheet or the single store style sheet (or the cart style sheet), you can use the "Additional Store Style Sheets" feature to upload additional style sheets to be used by your store.

When your store loads in the customer's browser, the main style sheet will load first, followed by the cart style sheet, the supplementary style sheets, the single store style sheet, and finally the "additional" store style sheets. Each style sheet can override the styles in style sheets that have previously loaded. For example, styles in a supplementary style sheet can override styles in the main style sheet or the cart style sheet. Likewise, styles in an "additional" stylesheet can override styles in the main style sheet, the cart style sheet, supplementary style sheets, and the single store style sheet.

"Additional" store style sheets can also be used to provide new styles for additional HTML that you've added to pages via the numerous fields that allow HTML (such as the Header, Left Nav, and Footer HTML fields for stores in single-store mode).
"Additional store style sheets" might also come in handy if you want to separate store styles into multiple style sheets. You can upload up to five "additional" style sheets for use by your store. Use the checkboxes in the "Use this style sheet" column to select which style sheets should be active and then select the Save button.

Like all style sheets, additional store style sheets must pass a validation process before they can be uploaded. For more information about the validation process, see "Single-Store Style Sheets" on page 177.

**Validation of Style Sheets**

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

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

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

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

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

For more about the validation process, see the uStores Layout Guide.

**Important!** The default uStores style sheet includes a comment at the beginning of the file. This comment identifies the file version. When you download this style sheet, this comment is included in the style sheet. Before you can successfully upload your edited uStores style sheet, you MUST remove this comment.

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

If the style sheet for a store in single-store mode references any images, a store manager can upload these images by using the Style Sheet Image Management section of the Single Store Style Sheet Settings page:

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

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

Store managers manage images by using the Single Store Style Sheet Settings page.

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

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

To upload an image, follow these instructions:

1. Select the Upload Image button.

   The Marketplace Image Upload window then appears.

2. Select the Browse button.

3. Locate the image to be uploaded.

4. Select the Upload Now button.

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

The store user roles include:

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

And here are descriptions of the duties that these user roles can take:
## Store User Roles

<table>
<thead>
<tr>
<th>User Role</th>
<th>What They Can Do</th>
</tr>
</thead>
</table>
| **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, store contact, fulfiller with refund/cancel rights, and fulfiller user roles to other users  
• View Marketplace financial reports for the store |
| **Store Clerk**  | • Add and edit products in their assigned store and move products among categories |
### User Role

<table>
<thead>
<tr>
<th>User Role</th>
<th>What They Can Do</th>
</tr>
</thead>
</table>
| 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.

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, store accountants, and store contacts. This page allows for the following actions:

- **Grant store user roles to U.Commerce Users**—Merchant managers and store managers can give other U.Commerce users the roles of store clerk, fulfiller, fulfiller with cancel/refund rights, and store accountant by choosing the "View U.Commerce Users" button near the top of the page and then editing roles for the corresponding users. For detailed instructions, see Section, "Adding Store Users" on page 187.

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

- **Enable or Disable the user**—You can edit the status of a user by clicking the Enabled or Disabled text link in the Marketplace Status column.

- **Edit user**—You can edit a user's role by choosing the "Edit User" text link in the Action column. For detailed instructions, see Section, "Editing Store Users" on page 188.

### 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.


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.
Chapter 4

Note: For more information about the store user roles, see "Store User Roles" on page 184.

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, store contacts, fulfillers, fulfillers with cancel/refund rights, and store accountants.

Note: Only store managers can edit these roles.


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: Fulfiller with cancel/refund rights, Fulfiller, Store Clerk, and Store Accountant.

OR

To remove a role, click the checkbox for that role in the Assigned Roles column.

Note: For more information about the various user roles, see "Marketplace Users" on page 14.

4. Click the Add Roles button to add the available roles to the user.

OR

Click the Remove Roles button to remove roles from the user.

4.7 Images

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


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

2 Upload a side banner.

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

**Note:** By default, this image should be no wider than 150 pixels; however, if the uStores style sheet (marketplace.css) has been modified to increase the width of this area, a wider side banner may be acceptable. For more information about Marketplace style sheets, see the *Marketplace uStores Layout Guide*.

3 Upload your store header image (if applicable).

This option only appears if you both 1) selected single-store-only mode when choosing the store settings and 2) selected to use a store header image (on the [Store] General Settings page). In this case, the store header image will be used if the customer arrives at the store by using a direct link that includes the "SINGLESTORE=true" parameter (see "Linking to a Store" on page 225). This image will appear in the header area of the store’s web pages. However, if a customer arrives at the store by way of the Marketplace mall (if the store is viewable in the mall), the mall header image will appear, not the store header image.

4 Upload your splash image (if applicable).
The splash image appears on your store’s home page only when the Splash home page layout is selected on the [Store] General Settings page. If the Splash layout option is not selected, the splash image option will not be displayed.

**Note:** By default, this image should be no wider than 680 pixels; however, if the uStores style sheet (marketplace.css) has been modified to increase the width of this area, a wider splash image may be acceptable. Likewise, if the style sheet has been modified to reduce the width of this area, a narrower splash image may be required to prevent potential layout problems. For more information about Marketplace style sheets, see the *Marketplace uStores Layout Guide*.

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

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

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

6 Click the Save Store Image Info button.

**Image Specifications**

- You can only use GIF, JPG, or PNG format images.
- Side banners are best displayed at a pixel size of 150 (width) x 300 (height).
- Store header images are best displayed at a pixel size of 960 (width) by 100 (height).
- Splash images are best displayed at a pixel size of 680 (width) x 280 (height).
- All images must have file sizes of 250K or less.

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

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

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

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


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

3. Leave the Authentication Method set to No Authentication unless either of the following situations applies: 1) your school has developed authentication transactions to use with Marketplace ("How to Add an Authentication Method" on page 304) or 2) you would like the payment method to be available only to registered users (in which case you would select "Registered Users" as the Authentication Method).

<table>
<thead>
<tr>
<th>Default Payment Methods</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment Method for New Products</td>
</tr>
<tr>
<td>American Express</td>
</tr>
<tr>
<td>Discover</td>
</tr>
<tr>
<td>Interac</td>
</tr>
<tr>
<td>MasterCard</td>
</tr>
<tr>
<td>Visa</td>
</tr>
<tr>
<td>WebCheck</td>
</tr>
</tbody>
</table>

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

5. Click the Save Changes button.

*Note:* The settings on the Payment Methods page do not restrict the available payment methods. If you need to limit the available payment methods for all products in a store, you can do so by using the Group Payment Methods page, as described in "Group Payment Methods" on page 206.

**Notes on Payment Methods**

Marketplace uStores accepts credit cards, campus cards, Interac Online, and electronic check (ACH). In addition, schools that use the Banner by Ellucian system for general ledger functionality can use departmental charge as a payment method. And new in Marketplace 6.5: Invoice Me allows

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.

**Credit Cards Accepted by Marketplace**

<table>
<thead>
<tr>
<th>Credit Card Name</th>
<th>Name Displayed to Buyers</th>
</tr>
</thead>
<tbody>
<tr>
<td>MasterCard</td>
<td>MasterCard</td>
</tr>
<tr>
<td>Visa</td>
<td>Visa</td>
</tr>
<tr>
<td>American Express</td>
<td>AmEx</td>
</tr>
<tr>
<td>Discover Card</td>
<td>Discover</td>
</tr>
<tr>
<td>JCB</td>
<td>JCB</td>
</tr>
<tr>
<td>Diners Club International</td>
<td>DinersClub</td>
</tr>
<tr>
<td>Carte Blanche</td>
<td>CarteBlanche</td>
</tr>
<tr>
<td>China UnionPay</td>
<td>ChinaUnionPay</td>
</tr>
<tr>
<td>DinaCard</td>
<td>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.</td>
</tr>
<tr>
<td>BC Card</td>
<td></td>
</tr>
</tbody>
</table>

The credit card names displayed to customers are predefined in Payment Gateway and are not editable.

Store managers determine which payment methods to use for each product. For example, a host system account might be configured for MasterCard, Visa, American Express, and ACH, but an individual product might be
configured to only use MasterCard and ACH (a subset of the available payment methods).

Marketplace displays icons for each available payment method on the Payment Method page of the checkout process. If Discover is selected as an accepted payment method for a product, customers will also see icons for DinaCard and BC Card, according to Discover Network requirements.

The payment period with recurring payments cannot exceed the expiration date on the customer’s credit card.

**Important!** The Discover Network requires that all merchants that accept the Discover Card must also accept Diners Club, JCB, Carte Blanche, and China UnionPay. For details, please check your agreement with the Discover Network. When you set up payment methods for a product, you should keep this requirement in mind.

### Campus Cards Accepted by Marketplace

<table>
<thead>
<tr>
<th>Campus Card Name</th>
<th>Name Displayed to Buyers</th>
</tr>
</thead>
<tbody>
<tr>
<td>CBORD</td>
<td>Configurable in Payment Gateway</td>
</tr>
<tr>
<td>Blackboard</td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Name Displayed in Operations Center</th>
<th>Name Displayed to Buyers</th>
</tr>
</thead>
<tbody>
<tr>
<td>INTERAC</td>
<td>Online Payment via INTERAC</td>
</tr>
</tbody>
</table>

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](http://www.interaconline.com).

### Electronic Check (ACH)

<table>
<thead>
<tr>
<th>Name Displayed in Operations Center</th>
<th>Name Displayed to Buyers</th>
</tr>
</thead>
<tbody>
<tr>
<td>webCheck</td>
<td>Electronic Check (ACH)</td>
</tr>
</tbody>
</table>

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**

<table>
<thead>
<tr>
<th>Name Displayed in Operations Center</th>
<th>Name Displayed to Buyers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Departmental Charge</td>
<td>Pay with Departmental Charge</td>
</tr>
</tbody>
</table>

Departmental charge must be configured in Payment Gateway as a User Define Payment Method. Then Marketplace can be configured to use this payment method for departmental charge. This payment method is only available as a payment type when the installation of Marketplace has been configured for integration with Banner by Ellucian. This payment method allows uStores customers to transfer budget funds between Banner general ledger accounts. It can be activated for specific user groups and specific products. When the buyer chooses to pay via departmental charge, the buyer must enter a Banner detail code in order to complete the transaction.

**Invoice Me**

<table>
<thead>
<tr>
<th>Name Displayed in Operations Center</th>
<th>Name Displayed to Buyers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configurable in Marketplace</td>
<td>Configurable in Marketplace</td>
</tr>
</tbody>
</table>

"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, 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 payment. (And therefore the e-mail message serves as the "invoice.") When payment is received, a fulfiller can update the payment status of the order.

### 4.9 Shipping Classes

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

Shipping classes can be assigned to physically similar products in which similar shipping rates will apply. Before you can add products to your store, you must define at least one shipping class. Later, when you enter products, you will associate a shipping class with each product.

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

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

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


2. Click the Add Shipping button near the top of the page to set up a new shipping class. A pop-up window will appear in which you must enter the following information:

   - **Shipping Class Name**—Remember, choose names that describe your shipping rate scheme. Shoppers can see the shipping class names and rate information by clicking the store’s Shipping Classes link.

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

   - **Default Delivery Location**—You must enter a City, State, and Postal Code. For default locations in the United States and its territories, you must enter a ZIP+4 in the ZIP/Postal Code field.
Important! You must know the ZIP+4 for the default delivery location before you can create a new shipping class.

After you enter the shipping class name, default delivery location, and select the OK button, you will be returned to the Store Shipping Classes page. The Shipping Class that you created will appear in its own Shipping Class table. You must now configure the delivery methods.

3 The Shipping Class tables list all the available delivery methods. Use the Shipping Class tables to configure the following 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 that can be downloaded, then you may choose to not require a shipping address.

- **Allowed Countries**—You can select the countries for which the delivery method applies. For example, you cannot ship an item outside the USA using USPS Express Mail. So if you will be allowing international delivery, then you must set up one or more delivery methods that work with the allowed countries.

- **Tax Class**—Choose a tax class to use with the delivery method. Marketplace includes three tax classes: no tax, default tax rate, and higher tax rate. Many implementations use only the "no tax" and "default tax rate" classes, but the "higher tax rate" class is available for jurisdictions that require higher tax rates on specific items.

**Note:** The higher tax rate is not available when the Marketplace tax service is used.
Chapter 4

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 114.

- **Accounting Code Override**—The shipping class will be reported to the general ledger system with the default accounting code set on the Store General Settings page unless you select an accounting code override. You can choose a different accounting code if necessary for each delivery method.

  **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 111.

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

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

If the customer is not required to enter a shipping address with the delivery method, then Marketplace will charge the tax based upon the default delivery location associated with the applicable shipping class for the product.

  **Important!** In order for a store manager to turn on the Marketplace tax service, all shipping classes for that store must use ZIP + 4 in the default delivery location for each shipping class.

5 Click the Save button.

**About Taxes and Shipping Addresses**

If a product (or its shipping) is configured for tax, the applicable rate is based upon the shipping address entered by the customer during the uStores checkout process. If the customer was not required to enter a shipping address with the delivery method, then Marketplace will charge the tax based upon the default delivery location associated with the applicable shipping class for the product.

  **Important!** If your store is using campus-maintained tax rates, you should check with the Marketplace administrator to ensure that a tax rate for the default delivery location of your store is included in the taxrates.dat file.
**Note:** If a product does not require shipping and you want the tax for this product to be based on the customer’s shipping address—instead of the default delivery location—then we recommend that you use the Require Shipping Address checkbox. When this checkbox is selected, the customer will always be required to enter a shipping address when they choose the corresponding delivery method; and therefore the tax will be calculated based on the shipping address.

As with any tax situation, you should contact your tax consultant to determine the applicable taxes.

**Changing Delivery Methods**

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

**Removing a Shipping Class**

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

**Selecting Allowed Countries for Shipping**

You can restrict which countries are available for each delivery method. To select the allowed countries, click the Select Countries link for the corresponding delivery method. The Marketplace Store Shipping Countries Allowed page then appears.
By default, all countries are selected on the Marketplace Store Shipping Countries Allowed page. You can select and de-select countries as necessary by clicking the corresponding checkboxes. Then click the Save button.

### 4.10 Store Product Categories

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

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

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

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

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


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

   Enter the category name and choose a layout for the category page:

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

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

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

3 Click the OK button.

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

```
Architectural Supplies Category Listing Order

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

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

5 To edit an existing category, click the Edit link to the right of it. The following page appears:
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 249).

Deleting a Category

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

Renaming a Category

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

**Using Category Graphics**

Shoppers see store category images when they browse through categories in the store. If a category doesn’t use a category side banner, the store’s side banner will appear instead.

The category side banner appears at the left side of the page. The thumbnail image appears beside the category name in lists of subcategories.

**Image Specifications**

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

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

**Linking to a Store Category**

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

The URL for a store category uses the following format:

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

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

**Note:** Do not include bracket characters in the URL.

**QR Code Management**

The QR Code Management page allows you to generate a QR code that can be downloaded for use on printed material. The QR code represents a URL for a Marketplace 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.

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 > 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.

<table>
<thead>
<tr>
<th>QR Code Management</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Code Size:</strong></td>
<td><strong>Smal</strong></td>
</tr>
<tr>
<td><strong>File Type:</strong></td>
<td><strong>png</strong></td>
</tr>
<tr>
<td><strong>Embedded Uri:</strong></td>
<td><img src="image" alt="QR Code Image" /></td>
</tr>
<tr>
<td><strong>Image:</strong></td>
<td></td>
</tr>
</tbody>
</table>

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.

### 4.11 Allowed Groups

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

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

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

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

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


    ![Architectural Supplies Allowed Groups](image)

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

2. Select the groups that can shop in your store.
• If you select Everybody, then all shoppers in Marketplace can shop in the store.

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

• Any additional user groups listed are private

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

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

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

**5** Click the Save Changes button.

### 4.12 Group Payment Methods

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

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

The store manager must specify payment methods for user groups:

**1** From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Groups Payment Methods. The Payment Method Settings page appears.
For each group shown, select the payment methods that group members can use. In the example above, all shoppers can use American Express, Discover, MasterCard, and Visa credit cards to purchase items, but a registered user who has logged in can also pay electronically via webCheck (ACH) from a bank account.

Click the Save Changes button.

**Note:** When you disable a user group (by unchecking a user group on a store’s Allowed Groups page), the selected payment methods are stripped away for that user group. If you subsequently re-enable the same user group, you will need to reselect the allowed payment methods.

### 4.13 Creating Store Promotions

A promotion is a limited-time price discount that a store manager applies to a product, group of products, all products, or one or more categories. A store manager who creates a promotion can, if desired, create an e-mail that advertises the promotion and an e-mail distribution list.
The store manager assigns each new promotion a promotional code. Shoppers must know the code to use the promotion. If you use a promotional e-mail, include the code in its text.

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

Creating a New Promotion

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

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

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

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

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

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

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

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

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

How to Create a Promotion

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

Click the link for the type of promotion to add.

If you chose a Store-Wide Promotion, the following page appears.
3 Enter the promotion info for the store-wide promotion.

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

The Product Promotion screen has exactly the same fields as the Store Promotion, plus an opportunity to choose which products the promotion applies to:
Likewise, the Category Promotion screen includes an opportunity to choose which category the promotion is for:

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

5 If you chose to send a promotional e-mail, the following page appears.
Complete the fields. Send a test e-mail to yourself if you want to see how the message will look. When you are finished, click the Send E-mail to Recipients button.

**Tips for Drafting a Promotional E-mail**

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

**Changing an Existing Promotion**

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

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

![Promotion Details](image)

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.

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.


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

### 4.14 User Modifiers (Buyer Info)

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

**Important!** Marketplace does not encrypt user modifier data in storage or mask this data in reports. Therefore, sensitive material should not be collected using the user modifier fields. For example, collecting Social Security Numbers with a user modifier field would increase the risk of the misuse of this information (i.e., identity theft).

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

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

- **Text Entry**—The shopper is asked to enter a text response to a prompt. This response can be either required or optional. For example, the shopper might be asked an optional demographics question, such as their current occupation. Or the shopper might be required to enter a text response to a prompt. For example, the shopper might be required to enter their year of graduation.
• **Optional Multiple Select Checkboxes**—The shopper is asked to choose from multiple checkbox options that may apply to themselves or their purchases. This response is not required. For example, the shopper might be asked to indicate which restaurants they have visited in the past year (with the checkboxes listing many hometown restaurants).

In addition, Marketplace provides a way for managing multiple modifiers:

• **Table Builder**—The Table Builder organizes modifiers in a table format, making it more convenient for customers to enter information for multiple modifiers during the uStores checkout process. Each column of the table represents a user modifier that is set up and controlled independently from the table.

### Adding a User Modifier

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

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

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

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

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

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

- **Text Entry Modifier**—You must enter a name for the modifier and select whether the modifier should be a required or optional field. The "Format Validation" field allows you to specify the format of the entry (numeric, alphabetic, e-mail, date, phone number, etc.) so that validation can take place on the customer's entry and undesired characters can be eliminated. For example, by choosing, "numeric" you can eliminate alphabetic characters from being entered. Or by choosing "US/Canada Phone Number" you can ensure that the customer's entry has the format of a 10-digit phone number. Select a validation format from the dropdown list. Enter the minimum number and maximum
number of characters that must be entered in this field. (The maximum allowed by Marketplace is 100.)

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

The following table defines the validation formats that are available for text entries.

<table>
<thead>
<tr>
<th>Validation Format</th>
<th>Definition/Characters Alowed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Numeric</td>
<td>0123456789</td>
</tr>
<tr>
<td>Numeric Extended</td>
<td>0123456789-(), [space]</td>
</tr>
<tr>
<td>Alpha</td>
<td>abcdedfhijklmnopqrstuvwxyz ABCDEFGHIJKLMNOPQRSTUVWXYZ</td>
</tr>
<tr>
<td>Alpha Extended</td>
<td>abcdedfhijklmnopqrstuvwxyz ABCDEFGHIJKLMNOPQRSTUVWXYZ -(), &amp; [space] ' [single quote]</td>
</tr>
<tr>
<td>Alphanumeric</td>
<td>abcdedfhijklmnopqrstuvwxyz ABCDEFGHIJKLMNOPQRSTUVWXYZ 0123456789</td>
</tr>
<tr>
<td>Validation Format</td>
<td>Definition/Characters Alowed</td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>Alphanumeric Extended</td>
<td>abcedfghijklmnopqrstuvwxyz ABCDEFGHIJKLMNOPQRSTUVWXYZ 0123456789-(),.&amp; [space] ' [single quote]</td>
</tr>
<tr>
<td>Free Text</td>
<td>All characters.</td>
</tr>
<tr>
<td>Email</td>
<td>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.</td>
</tr>
<tr>
<td>Date mm/dd/yyyy</td>
<td>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.</td>
</tr>
<tr>
<td>Date dd/mm/yyyy</td>
<td>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.</td>
</tr>
<tr>
<td>Date yyyy/mm/dd</td>
<td>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.</td>
</tr>
<tr>
<td>US/Canada Phone number</td>
<td>(999) 999-9999 Length of 14, formatted with () -</td>
</tr>
<tr>
<td>Contains Alpha Characters</td>
<td>The entry must include one alphabetic character as specified above for Alpha validation.</td>
</tr>
<tr>
<td>File Name</td>
<td>All characters.</td>
</tr>
</tbody>
</table>

**Using the Table Builder**

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

1. From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > User Modifiers. The User Modifiers page appears. Any existing user modifiers, including Table Builders, are listed in the Current Modifiers section. The Type column will say "Table Builder" for existing table builders, and the modifiers that are part of the table builder will be grouped into a sub-table.
2 Select the Table Builder text link in the Add Modifier Group section. The Table Builder page appears.

3 Enter a Table Name.

4 From the Modifier drop down list, select a modifier to include in the table and click the Add Modifier to Table button.

   All modifiers that you have created are included in the Modifier dropdown list. The Table Builder allows you to organize existing modifiers into a tabular format. So be sure you have already created all the modifiers that you would like to appear in the table before you create the table.

5 Repeat Step 4 for all additional modifiers that you would like to include in the table.

6 Specify a sort order for the display of the modifier columns (left to right) in the table by entering a Sort Key number for each modifier.

7 Click the Save button.

Customers will see the table appear during the checkout process.
Editing a User Modifier

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

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

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

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

4. Click the Save Modifier button.

Deleting a User Modifier

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

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

2. For the user modifier that you need to delete, click the Remove text link in the Other Actions column. The user modifier is immediately removed.
Note: If a modifier is removed, it will still appear on the Buyer Information report.

4.15 Taxes

Marketplace 6.5 introduces the option of using a tax service that provides up-to-date tax rate tables for all municipalities in the United States, including territories and the armed forces. This information is updated on a monthly basis.

Store managers decide on a store-by-store basis whether to use the tax service by using the Store Tax Service page. When the Yes button for Use Tax Service is selected, the store will use the tax service for all tax calculations. When the No button for Use Tax Service is selected (which is the default selection for all stores), the store will use a tax method in which a Marketplace administrator is responsible maintaining the tax rate files for all states, counties, and cities where taxes should be withheld. This latter tax method is the only tax method that was available in Marketplace 6.0 and earlier.

To use the Marketplace tax service:


2. Select the Yes radio button.

Important! In order for a store manager to turn on the tax service, all shipping classes for a store must use ZIP + 4 in the default delivery locations.

3. Click the Save button.
About the Tax Methods

Marketplace offers two methods for computing taxes, and one of these methods is being introduced in Marketplace 6.5. Each store is given the ability to choose which tax option best meets their needs. The following table describes the two tax methods and the pros and cons of these methods.

<table>
<thead>
<tr>
<th>Tax Method</th>
<th>Pros</th>
<th>Cons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campus-maintained Tax Rates:</td>
<td>• The campus can take control as necessary over the applicable tax rates (for example, for a one-day zero-tax holiday).</td>
<td>• A Marketplace administrator is responsible for maintaining tax rates for all cities, counties, and states where tax will be charged.</td>
</tr>
<tr>
<td></td>
<td>• Allows for three tax rates: No tax, default tax, and higher tax.</td>
<td>• Tax rates can be applied at city, county, and state level, but not at the ZIP code level.</td>
</tr>
<tr>
<td>Marketplace Tax Service:</td>
<td>• The tax service maintains the tax rates for all USA states and territories.</td>
<td>• Only two tax rates are available: No tax and default tax (i.e., a higher tax rate is not available).</td>
</tr>
<tr>
<td>Marketplace Tax Service:</td>
<td>• Tax rates are updated monthly.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Tax rates are applied at a ZIP+4 level, thus providing greater accuracy.</td>
<td></td>
</tr>
</tbody>
</table>

About Tax Classes and Tax Rates

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

Note: The higher tax rate is not available when Marketplace provides the tax rates.

Store managers or store clerks decide which tax rate to charge for each product.
About Taxes and Shipping Addresses

If a product (or its shipping) is configured for tax, the applicable rate is based upon the shipping address entered by the customer during the uStores checkout process. If the customer was not required to enter a shipping address with the delivery method, then Marketplace will charge the tax based upon the default delivery location associated with the applicable shipping class for the product. This tax rate will be used for all products that do not require shipping, such as digital products.

As with any tax situation, you should contact your tax consultant to determine the applicable taxes.

4.16 Assigning Tax Account Codes

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

A merchant will first need to set up the general ledger accounting codes that can be used by the store, as described in "Merchant Accounting Codes" on page 137. Once these accounting codes are established you can then assign these accounting codes to tax classes.

To assign a tax account code:


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

3. Click the Save button.
**4.17 Linking to a Store**

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

By using Marketplace’s mall concept, in which all Marketplace stores are available from the Marketplace home page, you can encourage customers to view additional stores and foster additional shopping revenue for other stores. However, in some instances you may choose to focus customer attention on just your own store. In this situation, you can provide customers with a direct link to your store. You can even go a step further by putting your store in single-store-only mode, which has the effect of removing links from your store that would allow customers to navigate to the Marketplace home page, where they might discover other shopping opportunities. For more information about turning on single-store-only mode, see "Adding a New Store" on page 149.

**How to Link to a Store**

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

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

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

Marketplace stores use the following format for URLs:

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

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

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

The Store ID is displayed on the [Store] General Settings page.

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

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

An Example of Linking to a Store

For this example, we will use the following values: [server] is "touchnet.edu," [context] is "ustores," and [ID#] is 23. In addition, single-store mode has been turned on.

The store URL would look like this:

```
http://www.touchnet.edu/ustores/web/store_main.jsp?STOREID=23&SINGLESTORE=true
```
Note: SINGLESTORE must be in uppercase. This parameter is case sensitive.
5.0 Adding Products to a Store

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

There are two ways to add products.

- One at a time, using the Add a New Product Wizard in the Operations Center (See "Adding a Single Product Using the Wizard" on page 229).
- Or, you can build a product import file to add multiple products at the same time (See "Importing Product Lists" on page 244).

Rules and Tips

When adding products, keep these rules and tips in mind:

- If a product has options (like size or color), use the Add a New Product Wizard. You can’t include options in a product import file.
- With either method, you can add a product but choose not to enable it for immediate display to shoppers.
- If you don’t know some product details, leave those fields empty—or, in the product import file, include temporary text as a substitute for the real information. Add the product but leave it disabled. Then, edit the product and enable it later.
- If a product has modifiers (like a personal monogram), first add the product, then edit it to include the modifier features.

You can edit a product’s details anytime after you add the product. The fields to change a product are the same as those to add a product.

5.1 Adding a Single Product Using the Wizard

The Add a New Product Wizard makes adding products simple. Just follow the prompts and continue page by page through the process. Before you get started, however, make sure you understand the concept of using product "options" (such as size or color). Depending on your product, you may need to add product "options" as you work through the wizard.

Products With Options

An "option" is a factor like size or color that changes a product’s stock number. Using options lets you group related stock numbers (also known as stock keeping units, or SKUs) into a single product for display. Each combination of options results in a separately tracked "item for sale."
For instance, you might offer a shirt in three colors. Instead of adding three products, you enter the shirt as one product with three options.

As you go through the Add a New Product Wizard, you will have an opportunity to set up options for your product, if necessary.

**Important!** If an optional product feature doesn’t result in a different inventory item, use a product "modifier" instead. See "Products With Modifiers" on page 244 for more details.

### The Add a New Product Wizard

Follow these steps to add a single product. Merchant managers, store managers, and store clerks can add products.

**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 195.


2. Click the Add a New Product link. The Add a New Product Wizard: Step 1 page appears.
3. Complete the following product description fields:

- **Product Name**—Shoppers see the product name when browsing in the site. It also appears in order and billing confirmations, store financial reports, and fulfillment event records.

- **Short Description**—Shoppers see this short product description in the detailed product layout. This field accepts a maximum of 500 characters. This field accepts HTML. Depending on the chosen store or category layout, shoppers may add some products to the cart without seeing the long descriptions. Put critical details in both the short and long descriptions to make sure shoppers see this information.

In addition, for products that use the "Should this be offered as an additional item at checkout?" option, the short description will appear for shoppers on the "Additional Items" page, which is the
first page of the checkout process. Be sure to enter appropriate text in this field so that shoppers can make a good decision about whether to add the "additional item" to their shopping cart.

- **Long Description**—Shoppers see this description when they go to a product detail page. Price and options (such as size and color) appear below the description on the product detail page. You may want to use the long description to provide shoppers with additional information about the available options. If the product requires special shipping information or if its return policy differs from the store policy, you can add those details here. Depending on the chosen store or category layout, shoppers may add some products to the cart without seeing the long descriptions. Put critical details in both the short and long descriptions to make sure shoppers see this information. The Long Description field accepts a maximum of 30,000 characters. This field accepts HTML.

**Note:** You can use HTML in both the Short Description field and the Long Description field. HTML entered in these fields must be properly formatted. It will undergo a validation process and any improperly formatted HTML will not be accepted. We recommend you become proficient in authoring HTML before you attempt to add HTML to these fields. For more information about using HTML or CSS, please see the *Marketplace uStores Layout Guide*.

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

4 Choose a product type.

- **Generic**—This product type encompasses a wide range of products. Typically, these are physical products that require shipping (or pickup by the customer), but they may also be conference/seminar registrations.

- **Digital**—A digital product (e.g., a PDF, an audio file, a video file, a Flash presentation, a Microsoft PowerPoint presentation, etc.) that can be downloaded by the customer. Typically, these products do not require shipping; however, it is possible to use this product type to create a digital product and also request a shipping address so that a physical copy of the file (or a related product or document) could be shipped to the customer. Before you select Digital as the Product Type, you must ensure that a shipping class has been created that is appropriate for digital products. For example, in many cases you'll need a shipping class of "none." See "Shipping Classes When Delivery is Not Required" on page 241 for more information.
• **Donation**—If you select Donation as the Product Type, you need to ensure that a shipping class has been created that is appropriate for donations. See "Shipping Classes When Delivery is Not Required" on page 241 for more information.

5 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.

6 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.

   OR

7 Complete the "Donation amount" fields for Donation products.

   - **User entered amount**—Select this checkbox to display a field to the donor in which they can enter a specific donation amount.

   - **1**—Select this checkbox to provide donors with a set donation amount that they can choose by selecting a radio button. Enter the donation amount in the field to the right of the checkbox. Add more pre-set donation amounts by selecting the Add More Selections button. The first time you select the Add More Selections button a 2 line appears. The second time, a 3 line appears, etc.

8 Choose the allowed payment methods for this product. For more information about payment methods, see "Notes on Payment Methods" on page 193.
Important! If you do not choose any payment methods, the product will not be displayed to shoppers. For the product to be displayed, you must choose at least one payment method.

9 Enter the number of days to wait before fulfilling an order paid for using the ACH payment method.

Note: The waiting period allows time for Payment Gateway to return any notice that the ACH payment was rejected. Please consult your Payment Gateway administrator for an acceptable time period. The waiting period can be overridden by a fulfiller with refund/cancel rights.

10 Click the Continue button. The Step 2 page appears.

11 Complete the following fields.

- **Prompt for Donation amount**—(Donation only) You can customize the prompt that asks the customer for the donation amount.

- **Choose Shipping Class**—Choose a shipping class that contains delivery methods appropriate for the product. If the product type is "Digital" or "Donation," see "Shipping Classes When Delivery is Not Required" on page 241 for more information about setting up a shipping class appropriate for donations. For more information about shipping classes, see "Shipping Classes" on page 195.

- **Choose Tax Class**—Choose a tax class appropriate for the product. If a product is configured for tax, the applicable rate is based upon the shipping address entered by the customer during the uStores checkout process. Marketplace includes three tax classes: no tax, default tax rate, and higher tax rate. Many implementations use only the "no tax" and "default tax rate" classes, but the "higher tax rate" class is available for jurisdictions that require higher tax rates on specific items.
Note: The higher tax rate is not available when the Marketplace tax service is used.

If the customer was not required to enter a shipping address with the delivery method, then Marketplace will charge the tax based upon the default delivery location associated with the applicable shipping class for the product. In order for you to ensure that the appropriate tax rate is charged on a product in which no shipping is required—such as a digital product—we recommend that you use the Require Shipping Address checkbox. When this checkbox is selected, the customer will always be required to enter a shipping address and therefore the tax will be calculated based on this location. (As with any tax situation, you should contact your tax consultant to determine the applicable taxes.)

For more about tax classes, see "Tax Account Codes " on page 114.

- **Store Default Account Code** and **Accounting Code Override**—These fields are only present if the Perform General Ledger Updates option was selected when the store was established. For stores that use the general ledger system, the store’s default accounting code is displayed. You can choose either to use the default accounting code or select an override from the Accounting Code Override dropdown menu. For more information about accounting codes, see Section, "Merchant Accounting Codes" on page 137.

- **Special Authorization Required to Purchase?**—If the purchase of this product requires the customer to provide additional information that can be used to authorize the purchase (such as a password), choose the Yes radio button. Also, enter text in the "If yes, enter prompt displayed to buyer" field. This prompt will appear on the product page. In addition you must make an entry in the "What is the answer to the prompt?" field. The customer’s entry will be validated against this value. If you make no entry in the "What is the answer to the prompt?" field, then any customer entry will be accepted in the special authorization field.

  **Note:** If you would like buyers to be authenticated before they purchase this product, you should establish a user group. For more information, see Section, "User Groups and User Authentication" on page 132.

- **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.

12 Click the Continue button. The Step 3 page appears.
Click the upload links to launch the upload dialog window, which allows you to browse for images on the hard drive as well as network locations. Follow these guidelines when choosing images:

- You can only use GIF, JPG, or PNG format images.
- Full size product images are best displayed at 250 pixels wide by 250 pixels high.
- Thumbnail product images are best displayed at 80 pixels wide by 80 pixels high.
- All images must have file sizes of 250K or less.

**Note:** The file name of each image must be unique within a store. If you upload an image that uses the same name as another image within the same store, the original image will be overwritten. So remember to always use unique names for images.

**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.

Click the Continue button. The Step 4 page appears.
If the product has no options such as size and color, click the No radio button and then the Continue button. The Additional Product Info page appears. (Go to the next step.)

If the product has options such as size or color, click the Yes radio button and then the Continue button. The Add A New Product Wizard now follows an alternate branch that allows you to specify the product 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 black sweatshirts and white sweatshirts.

First, you’re asked to specify the types of options to use.

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 "Other" fields. 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. For example, if you selected "size" on the previous page, you might now enter "small," "medium," and "large." Or if you selected "color"
on the previous page, you might now enter "white," "red," and "yellow." You're initially given four fields in which to name the values for each product option. If you need to record more than four values for a product option, click the Add More button.

16 Click the Continue button when you are finished. The Additional Product Info page appears.


If you did not set up product options, as described in Step 15, you only have to fill out this page once. However, if you established product options, you will need to complete this page multiple times for each set of options (or for the combinations of options). For example, if you set up an option for "Size" and you entered the values of small, medium, and large. You would complete the Additional Product Info page three times.

By completing this page separately for each product option (or combination of options), you can set up different prices and inventory for each option (or combination of options). The "Item for Sale" column in the Product table describes which option (or option combination) you are currently working on. 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.

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 Step 1.

- **Stock #**—You must enter a stock number for all products, including digital products and donation products. This number can be a UPC number or any other number of value to your store or organization. Click the Assign Random Number button to have Marketplace automatically assign a stock number. If you manually enter a stock number, you can have Marketplace check to determine if the stock number is already in use: select the "Check to see if stock number is already assigned" checkbox.

- **Limit Quantity?**—(Generic and Donation only) Mark Yes to limit the quantity of the product that a shopper can purchase. If yes, enter the maximum order quantity.

- **Track inventory?**—(Generic and Donation only) Mark Yes to track the product’s inventory. If yes, enter the initial inventory quantity.

- **Back orderable?**—(Generic and Donation only) Mark Yes if a shopper can order the product even when the quantity available is zero.

- **Upload product file**—(Digital only) When you select this link, you can browse to a file and select it for upload. If you added options to the product (such as file format or file size, see Step 12 above), you’ll be able to upload a different digital file for each combination of options.

- **Maximum times customer can request download?**—(Digital only) This option can be used to restrict the total number of times a customer can download a digital file.

- **Time limit for downloading?**—(Digital only) This option can be used to place a time limit—in days—on the period during which the digital product can be downloaded.

- **Auto fulfill?**—This option can be used for any product in which the payment should take place at the time the order is submitted versus when the order is fulfilled. Typically, this option would be used for products in which no shipping is involved, such as donations or digital products. It could also be used for some generic products (e.g., for conference registrations when no materials are shipped to the customer).

**Note:** (For donations only) In order for the recurring payments option to be available, the Auto Fulfill option must be set to Yes.
In addition, the recurring payments options must also be selected in the store’s general settings.

- **Item for Sale is not available**—If an option combination (an "Item for Sale") is not valid for your store, or if a combination is not currently available, you can use this checkbox to disable the "Item for Sale." For example, a small blue sweatshirt IS available but a small white sweatshirt is NOT. If at a later day you need to enable the "Item for Sale", you can do so by navigating to the Product Option page.

18 Click the Continue button when you are finished. The enable/disable options appears.

19 You have three options on this page:

- **Enable this product for now**—If you choose this option, the product will be immediately available to buyers once you click the Add Product button.

- **Disable this product for now**—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 244, you should check the "Disable this product for now" checkbox. By taking this action, you can set modifiers for the product before it goes live in your store.
• **Schedule Product**—These fields can be used to enable and/or disable a product on a specified date and time. Both a date and time must be selected. Times 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 time are selected, you do not need to enter a disable date and time. Likewise, when you enter a disable date and time, you do not need to enter an enable date and time.

**Note:** The time zone for the enable and disable times is established on the Store General Settings page, as described in "General Settings" on page 150.

20 Click the Add Product button. The Step 7 page appears.

21 Assign your product to Marketplace categories (for more information, see "Mall Product Categories" on page 105) and an in-store category (for more information, see "Store Product Categories" on page 200).

22 Click the Continue button. Your product has been successfully added to your store!

**Shipping Classes When Delivery is Not Required**

For the product types of "Digital" and "Donation," you need to ensure that a shipping class has been created in which the delivery method of N/A (or None) has been enabled. Take the following actions to set up a shipping class.

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

2 Review the shipping classes displayed on this screen to determine if a shipping class appropriate for donations has already been created. In a shipping class appropriate for donations, the Enabled checkbox will be checked for the delivery method of N/A (or None), and the other delivery methods in the shipping class will not be enabled. This shipping class should be named "No Shipping Required" (or
something similar). If this shipping class does not exist, proceed to Step 3.

3. Click the Add New Shipping Class text link. A pop-up window appears.

4. Enter "No Shipping Required" in the Enter New Shipping Class Name field and click OK. The Shipping Classes screen is refreshed with the new shipping class added.

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 195 and "Delivery Methods" on page 111.

Donations and Recurring Payments

The Recurring Payment Setup page will appear as part of the Add a New Product Wizard if the following conditions have been met:

1. The Allow Recurring Payments on Donation Product Types option has been turned on in the store’s general settings.

2. Donation was selected as the Product Type in Step 1 of the Add a New Product Wizard.
3 The Auto Fulfill option was set to Yes on the Additional Product Info page of the Add a New Product Wizard.

If these conditions are met, the Recurring Payment Setup page will appear as part of the Add a New Product Wizard immediately after the Additional Product Info page. (For more information about the Add a New Product Wizard, see "The Add a New Product Wizard" on page 230.)

Follow these steps to complete the Recurring Payment Setup page:

1 Complete the following fields.
   - **Allow Recurring Payments?**—If you set this option to Yes, complete the rest of the options for the page. If you set the option to No, skip the rest of the options on this page.
   - **Recurring Payments are required?**—If you want to require customers to use recurring payments, select Yes. Otherwise, select No.
   - **Prompt Displayed to User Asking if Recurring Payments are Desired**—This field determines the prompt text that asks the customer whether they want to make a recurring payment. The prompt appears when the customer adds the donation product to their shopping cart.
   - **Maximum Duration**—Enter a number and specify whether it is a number of months or years. The most you can allow is 6 years. If you leave the number field empty, the maximum duration will be 6 years.
   - **Accepted Frequencies**—When making a recurring payment, the customer is asked, "How often will your payment recur?" The frequency options you check here will appear in the dropdown selection list for the customer.

2 Click the Continue button.
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 280.

5.2 Importing Product Lists

You can import multiple products using a product import file.

Creating the Product Import File

Use any text editor to create your product import file with each row in the file describing a single product. The entries for each product, which are similar to those in the Add a New Product Wizard, are separated by commas. Save the file in CSV (comma-separated value) format.

Keep in mind these rules and tips:

- **Don't include products that use options.** For products with options like size or color, use the Add a New Product Wizard. Marketplace product options are not supported when using a product import file.

- **Use temporary values if needed.** If you don't know all the product's details, enter temporary values. Import the product, then edit it with the Operations Center.

- **Save the file with a descriptive name.** You may have more than one import file. Use file names that you will recognize when you import the products.

- **After import, check the product information.** Edit each imported product to verify its details and add any others. For instance, you must edit the product to add its graphics or choose its site categories.

- **After import, move products to the right categories.** With the default layout for the store home page, imported products appear on the store home page. With the splash layout for the home page, imported products are added to the "Not Shown to Buyer" category, which...
means you will need to move each product to an appropriate category in order for it to be displayed in your store.

**Note:** With the splash layout selected for the home page, you should not select "Store Home Page" as the category for a product. This category will not display products in the splash layout. As a reminder, the Choose Other Category dropdown list on the Product Management screen will display "Store Home Page - Not Displayed."

- **Payment types are determined by store settings.** The default payment types configured in the store settings determine the payment types for each product in the import file. If you need to alter the allowable payment types for a specific product, you should import the product and then edit the product with the Operations Center.

### About the CSV Format

In the CSV format, values are separated by commas. You can use one or two sets of quotation marks around a value. If an entry includes a comma, the entire entry must be contained inside quotation marks.

If an entry includes quotation marks, include them with a double set of quotation marks. For example, the entry "Item 3" would yield the result Item 3, while the entry "Item "4", size small" would yield the result Item "4", size small.

### Steps in Creating the File

1. In a text file, enter the row of required column headings (see "Required Column Headings" on page 245).

2. To the row, add any optional column headings you want to use (see "Optional Column Headings" on page 246).

3. In a new row, enter the values for the first product. Enter all the required values. To leave an optional value empty, enter a comma only.

4. Add a new row for each additional product, then save and close the file.

### Required Column Headings

Enter these column headers on the first row or line of the file exactly as shown here:

```
NAME,SHORT_DESC,LONG_DESC,SHIP_CLASS,PRICE,PRODUCT_TYPE
```

Under each required column, enter the values for your product. If you don’t know all of a product’s details, enter temporary values. Import the product, then edit it later in the Manage Products pages.
Field definitions:

**NAME**
Name of the product. Maximum 50 characters.

**SHORT_DESC**
Short description of the product. Maximum 100 characters.

**LONG_DESC**

**SHIP_CLASS**
Name of the Shipping Class for the product. Must match an existing shipping class name in the store.

**PRICE**
Product price. Use the format x.xx, with up to two decimal places. Do not use commas or dollar signs. Do not use negative numbers.

**PRODUCT_TYPE**
Enter Donation for a donation product. Otherwise, enter Generic. (Donation products must have a price of 0.00.)

Optional Column Headings
These columns are optional. If you include one of these columns, its column header must appear on the first row or line of the file.
QTY, BACK_ORDERABLE, STOCK_NO, ENABLED, AUTH_REQD, AUTH_PROMPT, TAX_CLASS, CREDIT_ACCOUNT

Enter an optional value under its correct column heading. You can change this and all other product entries later in the Manage Products pages.

To leave an optional value blank, enter only a comma. For example, the first product here uses all four optional values. The second product doesn’t use the stock number value. (Required columns not shown.)
QTY, BACK_ORDERABLE, STOCK_NO, ENABLED
15, Y, 2765-OT3, Y
35, Y,, Y
Field definitions:

QTY
Quantity available. If this column is not used, the quantity available will not be tracked. You can change this entry later in the Edit Product page.

BACK_ORDERABLE
Signals whether the product may be purchased with back-order status. Enter Y if the product is back-orderable. Enter N if the product is not back-orderable. If the column or value is not used, the product is imported as "not back-orderable."

STOCK_NO
Stock number. Maximum 30 characters. If the column or value is not used, a random number will be assigned.

ENABLED
Signals whether product should be enabled for display. Enter Y to display the product immediately. Enter N to leave the product disabled. If the column or value is not used, the product will be enabled and displayed for purchase.

AUTH_REQD
Signals whether authorization is required to purchase the product. Enter Y if authorization is required, otherwise enter N. If the column or value is not used, the product will be imported as "no authorization required."

AUTH_PROMPT
Prompt displayed to the user if authorization is required. Maximum 200 characters. Must be filled in if authorization is required.

AUTH_PROMPT_ANS
Answer to prompt from the user if authorization is required. Must be filled in if authorization is required. A maximum of 50 characters.

TAX_CLASS
Tax class name. Must be one of these: No tax, Default tax rate, or Higher tax rate. If the column or value is not used, the product will use the Default tax rate class set up by the administrator.

DEBIT_ACCOUNT
Only use this column if you are transferring data to a General Ledger system. Enter a value if the accounting code for the product is different than
the store’s default accounting code. To use the default accounting code, leave the column blank by entering only a comma.

Importing a CSV File

After you have created a CSV file, use the following steps to import the file.


2. Choose the "Import Product(s) from a File" link. The Product File Upload page appears.

3. Choose import options.
   - **Check for errors only**—Use this option to test the import without saving products and see if any errors exist in the CSV file. If you choose this option, Marketplace will return a list of the errors that it encounters, such as shipping classes or accounting codes that are used in the CSV file but not available for products in the store.
   - **Check to see if stock number is already used**—Use this option to determine if the products in the CSV file are using unique stock numbers that have not previously been assigned to products.

4. Either enter the path of the CSV file or click the Browse button to locate the file.

5. Click the Upload Now button. The Upload Status page appears. Messages are displayed on this screen and these messages either represent errors with the import file or confirm that products were imported.

Using a CSV File to Edit Products

You can edit products in Marketplace by using a CSV file. To edit a product, the stock number must be identical in both the Marketplace store and the CSV file.

Use the following steps to import a CSV file for editing products.

2. Choose the "Import Product(s) from a File" link. The Product File Upload page appears.

3. Verify that the "Check to see if stock number is already used" checkbox is selected.

4. Either enter the path of the CSV file or click the Browse button to locate the file.

5. Click the Upload Now button. The Upload Status page appears. Messages are displayed on this screen and these messages 1) represent potential errors with the import file, 2) confirm that products were imported, and 3) list the products that will be edited.

Note: For each product you are editing, Marketplace will return a warning on the Upload Status screen that says the stock number is in use.

6. Confirm each product that should be edited by choosing the corresponding checkbox in the Update Database column.

7. Choose the Update Products button.

5.3 Managing Products in a Store

After products have been added to a store, the Product Management page can be used (by merchant managers, store managers, and store clerks) for the following purposes:

- To edit product features
- To move a product to a different category for display
- To enable or disable product display
- To change the display listing order of products within a category
- To delete a product

To open the Product Management page, the store manager or merchant manager navigates to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products. The Store Product Management page appears.
5.4 Editing Products

Use the following steps to edit a product:


2. Select the product’s category from the Choose Product Category dropdown menu. The Products page is refreshed with the products from the selected category.

3. Click the product name link. The Product Settings page appears.

4. Edit the fields on Product Settings page. All the fields are described below in the “Field descriptions” section.
5.0 Adding Products to a Store

The top portion of the Product Settings page.

<table>
<thead>
<tr>
<th>General Settings</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Product Type</strong></td>
<td><strong>Generic</strong></td>
</tr>
<tr>
<td>(500 chars max)</td>
<td>Wales Soccer Ball</td>
</tr>
<tr>
<td><strong>Items for Sale</strong></td>
<td>**View</td>
</tr>
<tr>
<td><strong>Modifiers</strong></td>
<td><strong>Add Modifier</strong></td>
</tr>
<tr>
<td><strong>Show status</strong></td>
<td><strong>ENABLED</strong></td>
</tr>
<tr>
<td>Manage status</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description Settings</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Short Description</strong></td>
<td>(500 chars max)</td>
</tr>
<tr>
<td>(HTML, Allowed)</td>
<td>Wales Soccer Ball</td>
</tr>
<tr>
<td><strong>Long Description</strong></td>
<td>(10,000 chars max)</td>
</tr>
<tr>
<td>(HTML, Allowed)</td>
<td>Wales Soccer Ball</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Checkout Options</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Should this be offered as an additional item at checkout?</strong></td>
<td><strong>Yes</strong></td>
</tr>
<tr>
<td><strong>Should this be offered only as an additional item at checkout?</strong></td>
<td><strong>No</strong></td>
</tr>
<tr>
<td>(Only if you answered yes to question above)</td>
<td></td>
</tr>
<tr>
<td><strong>Show stock number to shoppers:</strong></td>
<td><strong>Yes</strong></td>
</tr>
<tr>
<td><strong>Show quantity prompt to shoppers:</strong></td>
<td><strong>No</strong></td>
</tr>
<tr>
<td><strong>Product purchase requires Special Authorization:</strong></td>
<td><strong>Yes</strong></td>
</tr>
<tr>
<td><strong>Prompt for Special Authorization:</strong></td>
<td></td>
</tr>
<tr>
<td>(200 chars max)</td>
<td></td>
</tr>
<tr>
<td><strong>Special Authorization value:</strong></td>
<td></td>
</tr>
<tr>
<td>(50 chars max)</td>
<td></td>
</tr>
<tr>
<td><strong>Shipping/handling messages:</strong></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Product Settings</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Price is in USD ($):</strong></td>
<td>8871760</td>
</tr>
<tr>
<td><strong>Stock Number</strong>:</td>
<td>500 chars max</td>
</tr>
<tr>
<td><strong>Prices</strong>:</td>
<td>30.00</td>
</tr>
<tr>
<td><strong>Limit Order Quantity</strong>:</td>
<td><strong>Yes</strong>, <strong>Maximum Order Quantity</strong>:</td>
</tr>
<tr>
<td><strong>Yes</strong>, <strong>No</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Track Inventory</strong>:</td>
<td><strong>Yes</strong>, <strong>Current Quantity</strong>:</td>
</tr>
<tr>
<td><strong>Yes</strong>, <strong>No</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Sack Orders</strong>:</td>
<td><strong>Yes</strong></td>
</tr>
<tr>
<td><strong>No</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Auto PAID</strong>:</td>
<td><strong>Yes</strong></td>
</tr>
<tr>
<td><strong>No</strong></td>
<td></td>
</tr>
</tbody>
</table>
Field descriptions:

General Settings

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.

Items for Sale
If "options" such as size or color were established for the product, then the product is available as multiple "Items for Sale" (with separate inventory for each "item for sale"). The following configuration options are available:

- You can use the View link to view the "Items for Sale" and to edit the product settings for stock number, price, inventory, and other settings that apply to a single "item for Sale.". For more information about editing "Items for Sale," see the "Viewing and Modifying Items for Sale" section of "Using Product Options" on page 269.

- If product options have NOT been configured, the "Add Options" link appears. This link can be used to add options and create multiple "Items for Sale." For more information about adding product options, see the "Adding Product Options" section of "Using Product Options" on page 269.
• If product options have been configured, the "Modify Options" link appears. This link can be used to modify the existing options (and new options). For more information about modifying product options, see the "Modifying Product Options" section of "Using Product Options" on page 269.

Modifiers
A "modifier" is a custom ordering option. For example, a modifier could be used to add a monogram to a shirt (the shirt is the product and the monogram is a modifier), or a modifier could be used to collect a lunch preference or a conference session selection when a shopper is registering for a conference (the conference registration is the product and the lunch preference and the session selection are modifiers). The modifier doesn’t change the stock number of the product, but it might change the price. The following configuration options are available:

• If modifiers have NOT been configured, the "Add Modifiers" link appears. This link can be used to add modifiers. For more information about adding modifiers, see the "Add a Product Modifier" section of "Using Product Modifiers" on page 280.

• If modifiers have been configured, the "Manage Modifiers" link appears. This link can be used to modify existing modifiers (and add new options). For more information, see the "Editing a Product Modifier" section of "Using Product Modifiers" on page 280.

Store Status
This field will say ENABLED, DISABLED, or PREVIEW. The status of the product can be changed by selecting the "Manage status" link. For more about managing the status of a product, see "Product Status Management" on page 296.

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.

Description Settings

**Short Description**

Shoppers see this short product description in the detailed product layout. This field accepts a maximum of 500 characters. This field accepts HTML. Depending on the chosen store or category layout, shoppers may add some products to the cart without seeing the long descriptions. Put critical details in both the short and long descriptions to make sure shoppers see this information.

In addition, for products that use the "Should this be offered as an additional item at checkout?" option, the short description will appear for shoppers on the "Additional Items" page, which is the first page of the checkout process. Be sure to enter appropriate text in this field so that shoppers can make a good decision about whether to add the "additional item" to their shopping cart.
**Long Description**

Shoppers see this description when they go to a product detail page. Price and options (such as size and color) appear below the description on the product detail page. You may want to use the long description to provide shoppers with additional information about the available options. If the product requires special shipping information or if its return policy differs from the store policy, you can add those details here. Depending on the chosen store or category layout, shoppers may add some products to the cart without seeing the long descriptions. Put critical details in both the short and long descriptions to make sure shoppers see this information. The Long Description field accepts a maximum of 30,000 characters. This field accepts HTML.

**Note:** You can use HTML in both the Short Description field and the Long Description field. HTML entered in these fields must be properly formatted. It will undergo a validation process and any improperly formatted HTML will not be accepted. We recommend you become proficient in authoring HTML before you attempt to add HTML to these fields. For more information about using HTML or CSS, please see the *Marketplace uStores Layout Guide*.

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

**Checkout Options**

**Should this be offered as an additional item at checkout?**

If you choose Yes for this option, any shopper who places a product from this store in their shopping cart and then initiates the checkout process will see an additional page at the beginning of the checkout process. This page will provide the shopper with the option of adding the product that you are now editing to their cart. By offering your shoppers additional items during checkout, you can help increase revenue by bringing special items to the attention of your customers.

**Should this be offered only as an additional item at checkout?**

(Only available if you chose Yes for the previous option.) If you choose Yes for this option, then this product will ONLY be available as an additional item during the checkout process. In other words, shoppers will not see the product on store pages or product category pages: the product will only be available once the checkout process has been initiated.
**Show stock number to shopper**
This option is set to Yes by default; however, if you would like to suppress the display of the stock number on uStores pages, select No.

**Show quantity prompt to shopper**
This option is set to Yes by default; however, if the quantity prompt is irrelevant for this product, you can remove it from uStores pages by selecting No.

**Product purchase requires Special Authorization**
If the purchase of this product requires the customer to provide additional information that can be used to authorize the purchase, choose the Yes radio button.

**Prompt for Special Authorization**
Shoppers must answer this prompt before they can add the product to their cart.

**Special Authorization value**
If you do NOT enter a value in this field, the shopper can enter any answer as the response to the Prompt for Special Authorization.

If you enter a value in this field, the shopper's entry must be identical to the Special Authorization value. If the shopper's entry is not identical, the shopper will not be able to add the product to their cart.

You should keep in mind that anyone who gets the answer can then purchase the product. For example, you might use the "Special Authorization" field in conjunction with a flier distributed on campus. The flier would describe the product and provide the answer for the "Prompt for Special Authorization. " Anyone who has seen the flier—as well as anyone who has been supplied the answer by any other means—can then purchase the product.

If you would like buyers to be authenticated before they purchase this product, you should establish a user group. For more information, see Section , "User Groups and User Authentication" on page 132.

**Shipping/handling message**
This message will appear on the packing slip that is printed during the fulfillment process. This message can contain special handling instructions required for the shipping of this product.

**Product Settings**

**Stock #**
You must enter a stock number for the product. This number can be a UPC number or any other number of value to your store or organization. If
necessary, you can allow Marketplace to assign a stock number for tracking and reports: click the Assign Random Stock # button. If you manually enter a stock number, you can have Marketplace check to determine if the stock number is already in use: select the "Check to see if stock number is already used" checkbox.

**Price**

This price is the base price for the product. The price can be affected by options and modifiers. If the Product Type is "Donation," do not enter a price. Also, see "Editing Donation Settings" on page 259 for more information about how the product fields are different for donation products.

**Limit Order Quantity?**

Mark Yes to limit the quantity of the product that a shopper can purchase. If yes, enter the maximum order quantity.

**Track inventory?**

Mark Yes to track the product's inventory. If yes, enter the initial inventory quantity.

**Back Orderable?**

Mark Yes if a shopper can order the product even when the quantity available is zero.

**Auto Fulfill?**

This option can be used for any product in which the payment should take place at the time the order is submitted versus when the order is fulfilled. Typically, this option would be used for products in which no shipping is involved, such as donations or digital products. It could also be used for some generic products (e.g., for conference registrations when no materials are shipped to the customer).

**Note:** If the Auto Fulfill option is set to Yes and the "Days fulfiller must wait before fulfilling orders paid via ACH" is set to any value greater than zero, then the Auto Fulfill selection is automatically overridden for ACH purchases and manual fulfillment is required.

**Note:** (For donations only) In order for the recurring payments option to be available, the Auto Fulfill option must be set to Yes. In addition, the recurring payments options must also be selected in the store's general settings.

### Option Settings

**Shipping Class**

Choose a shipping class that contains delivery methods appropriate for the product. If the product type is "Donation," see "Shipping Classes When
Delivery is Not Required" on page 241 for more information about setting up a shipping class appropriate for donations. For more information about shipping classes, see "Shipping Classes" on page 195.

**Tax Class**

Choose a tax class appropriate for the product. If a product is configured for tax, the applicable rate is based upon the shipping address entered by the customer during the uStores checkout process. Marketplace includes three tax classes: no tax, default tax rate, and higher tax rate. Many implementations use only the "no tax" and "default tax rate" classes, but the "higher tax rate" class is available for jurisdictions that require higher tax rates on specific items.

**Note:** The higher tax rate is not available when the Marketplace tax service is used.

If the customer was not required to enter a shipping address with the delivery method, then Marketplace will charge the tax based upon the default delivery location associated with the applicable shipping class for the product. In order for you to ensure that the appropriate tax rate is charged on a product in which no shipping is required—such as a digital product—we recommend that you use the Require Shipping Address checkbox. When this checkbox is selected, the customer will always be required to enter a shipping address and therefore the tax will be calculated based on this location. (As with any tax situation, you should contact your tax consultant to determine the applicable taxes.)

For more about tax classes, see "Tax Account Codes " on page 114.

**Override Default Accounting Code**

These fields are only present if the Perform General Ledger Updates option was selected when the store was established. For store’s that use the general ledger system, the store’s default accounting code is displayed. You can choose either to use the default accounting code or select an override from the Accounting Code Override dropdown menu. For more information about accounting codes, see "Merchant Accounting Codes" on page 137.

**Require shoppers to respond to CAPTCHA before the product can be placed in their cart?**

When Yes is selected, the shopper will see a CAPTCHA challenge prompt when they attempt to add the product to their shopping cart. The shopper must enter the code before they can continue. This field can be used to help prevent Internet bots from being used to purchase products, as bots cannot typically interpret CAPTCHA codes. Use of this field may be particularly relevant for a product in which the demand may be high and the inventory supply limited (such as parking places or a ticketed event).
Payment Method Settings

Allowed Payment Methods
Choose allowed payment methods for this product using the checkboxes. For more information about payment methods, see "Notes on Payment Methods" on page 193.

Days fulfills must wait before fulfilling orders paid via ACH
Enter the number of days to wait before fulfilling an order paid for using the ACH payment method. The waiting period allows time for Payment Gateway to return any notice that the ACH payment was rejected. Please consult your Payment Gateway administrator for an acceptable time period. The waiting period can be overridden by a fulfills with refund/cancel rights.

Note: If the Auto Fulfill option is set to Yes and the "Days to Wait before processing ACH Payments" is set to any value greater than zero, then the Auto Fulfill selection is automatically overidden and manual fulfillment is required.

Editing Donation Settings
Donations can be edited like generic products; however, the following additional fields also appear: Prompt for Donation Amount, the Donation amount fields, and a link to a setup page for Recurring Payments.

Note: In order for the Recurring Payments link to be available, the Auto Fulfill field must be set to Yes.

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).

If pre-set donation amounts are used, the prompt for donation amount appears above the pre-set donations amount.

If pre-set donation amounts are not used, the prompt for donation amount appears to the left of the “user entered amount” field.

- **Donation amount**—This section provides two options: 1) You can select the "user entered amount" checkbox to provide a field for donors to enter their donation amount and 2) You can select one or more numerical checkboxes to configure pre-set donation amounts. All selected pre-set donation amounts will be presented to donors as donation amount options; a radio button will appear beside each value. Donors can only choose one value. If you need to configure more pre-set donation amounts, select the Add More Selections button.

Donations can be edited like generic products; however, the following additional fields also appear: Prompt for Donation Amount, the Donation amount fields, and a link to a setup page for Recurring Payments.

**Note:** In order for the Recurring Payments link to be available, the Auto Fulfill field must be set to Yes.
Field descriptions:

- **Recurring Payments**—By clicking the View Setup link, you can set up a donation product to accept recurring payments from donors. When you click the View Setup link, the recurring payment fields are displayed.

- **Allow Recurring Payments?**—Turn on this option for donors by selecting Yes. If you select Yes, complete the rest of the options on this page. If you select No, skip the rest of the options on this page.

- **Recurring Payments are required?**—If you want to require customers to use recurring payments, select Yes. Otherwise, select No.

- **Prompt Displayed to User Asking if Recurring Payments are Desired**—This field determines the prompt text that asks the donor whether they want to make recurring payments. The prompt appears on the Product Details page.

  ![Prompt Example](image)

  The recurring payments prompt appears before donors place the item in their shopping cart.

- **Maximum Duration**—Enter a number and specify whether it is a number of months or years. The maximum duration is 99 years. Donors who use a credit card cannot set up a donation period that exceeds the expiration date on their credit card.

- **Accepted Frequencies**—When making a recurring payment, the customer is asked, "How often will your payment recur?" The frequency options you check here will appear in the dropdown selection list for the customer.

---

**Category Assignments**

Category assignments for products are assigned on the Product Details pages for each product.

![Category Assignments](image)

The Category Assignments section of the Product Details page.
You can edit the product’s system-level category assignment. (For more information about system-level categories, see "Mall Product Categories" on page 105.) To add a system-level category assignment, click the category name in the New Assignment list box. You can use CTRL-click to select multiple categories and SHIFT-click to select a range of categories. Then click the Submit button.

To remove a current assignment, select the checkbox for the corresponding category name displayed in the Current column. Then click the Remove Selected button.

Image Management

Product images are managed on the Product Details page for each product.

You can upload product images. Click the upload link to launch the upload dialog window, which allows you to browse for images on the hard drive as well as network locations. Follow these guidelines when choosing images:

- You can only use GIF, JPG, or PNG format images.
- Full size product images are best displayed at 250 pixels wide by 250 pixels high.
- Thumbnail product images are best displayed at 80 pixels wide by 80 pixels high.
- All images must have file sizes of 250K or less.

Note: The file name of each image must be unique within a store. If you upload an image that uses the same name as another image within the same store, the original image will be overwritten. So remember to always use unique names for images.
Important! It is your responsibility to ensure that you have all necessary rights for the images you upload. Images that you did not create (such as images on other websites) are typically protected by copyright law and should not be uploaded for use in Marketplace unless you have received permission from the copyright holder.

QR Code Management

The QR Code Management page 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 as displayed in uStores. 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 smartphone 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 smartphone.

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 Product Management page appears.

2. Locate the product in the appropriate category (using the Choose Other Category dropdown menu, if necessary).

3. Select a product name.
   The Product Details page appears for that product.

4. Scroll to the bottom of the page so that the QR Code Management section is visible.

5. 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.

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

7 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.

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

9 Save the file to the location of your choice.
Modifiers Management

Product modifiers are managed on the Manage Modifiers page for each product.

The Category Assignments section of the Product Details page.

You can add modifiers to products as well as edit existing modifiers. A "modifier" is a custom ordering option, such as monogramming. It doesn’t change the stock number of the product, but it might change the price. Modifiers aren’t part of the basic product setup.

The Manage Modifiers page consists of three sections:

- **Add Modifier**—The top section is named Add Modifier, and it lists the three types of modifiers that can be added to products: Required Selection, Text Entry, and Optional Multiple Select Checkboxes. To add a modifier, click the name of the modifier that you would like to add. For more information about how to add a modifier, see "Using Product Modifiers" on page 280.
• **Add Modifier Group**—The next section is named Add Modifier Group, and it lists modifiers that have been grouped to allow for easier entry when multiple items are ordered. These modifiers are displayed in a table to shoppers, and accordingly the Marketplace mechanism for grouping the modifiers is called "Table Builder." To add a modifier group, click the Table Builder text link.

• **Modifiers**—The third section is named Modifiers, and it lists all the modifiers that have been created. For each modifier, the modifier type is listed in the Type column. If the "Table Builder" has been used to group modifiers, the description "Table Builder" appears in the Type column and the modifiers in the group appear in a sub-table following the "Table Builder" entry. To edit an existing modifier: click the Edit link of the corresponding modifier. To remove an existing modifier: click the Remove link of the corresponding modifier. For more information about editing product modifiers, see "Using Product Modifiers" on page 280.

**Note:** To determine the display order of the product’s modifiers: enter a sort number in the Sort Key text box of each modifier and then click the Save Sort button. The sort order determines the order that modifiers are displayed on the shopping site’s Item Detail Page. This page is displayed after shoppers click the Add to Cart button.

---

**Moving a Product to a Different Store Category**

To move a product from one category to another:


2. Select the product’s category from the Choose Product Category dropdown menu. The Products page is refreshed with the products from the selected category.

3. Mark the Select checkbox for the product you want to move.

4. Use the Move To Category dropdown list to choose the new category for the product. All the store’s categories appear in this dropdown list.

5. Click the Move To Category button.

The "Not Shown to Buyer" option is always available in the Move To Category dropdown list. Use the "Not Shown to Buyer" selection to remove a product from a store category and thus suppress its display (however, the product will still be available by way of direct URL link).

If your store is using the Default ("Top Level Products and Categories" layout, then "Store Home Page" is also available from the Move To Category dropdown list. Use the Store Home Page selection in combination with the default Store Home Page Layout (as described in Section 4.2,
“Store Settings” on page 150) to display products directly on the store’s home page.

**Updating Product Status**

To change the status for a product, take the following action:


2. Use the Choose Other Category dropdown menu to choose the category that contains the product you wish to update.

The Product Management page is then updated with the products for the selected category. The uStores Status column indicates the current status of the products in the store category.

3. Use the uStores Status dropdown menu to select a new product status for a product.

The following states are available for the product status:

- **ENABLED**—Once a store is brought online, the product is available for shoppers.
- **DISABLED**—When a product is placed in DISABLED status, 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 for the corresponding product. Preview mode can be used to view how a product will look and function before you enable the product.
To update the current status of a product, simply choose the corresponding selection from the Ustores Status dropdown menu. The choice that you make will immediately affect the availability of the product.

Products that have been enabled are displayed to shoppers in the categories to which they belong. Products that have been disabled are not displayed to shoppers. If a shopper somehow reaches the product page for a disabled product (for example, by an outdated link or a saved favorite), the product cannot be added to the shopper’s cart.

In addition to immediately enabling or disabling products, you can also schedule when products will be automatically enabled or disabled. Scheduling is discussed in “Editing Products” on page 250.

By default, products within categories are shown in alphabetic order to the shopper. You can enter a specific order for any list of products in a category.

To change the listing order:

1. Open the Product Management page.
2. Use the Choose Other Category dropdown to navigate to the category containing the product.
3. In the Sort Key column, enter a two-digit "sort key" value for each product.
   
   **Note:** For numbers 1 through 9, use a leading zero (01, 02, 03, and so on). This ensures the listing order will be correct.
4. Click the Save Changes button.

   **Note:** If you leave some sort key fields empty, Marketplace will show the sorted products first, followed by the rest of the products in alphabetic order.

You can permanently remove products; however, be careful when deleting a product because it cannot be restored. To delete a product:

1. Open the Product Management page.
2. Use the Choose Other Category dropdown to navigate to the category containing the product.
3. The Action column contains a Delete link for each product. To delete a product, click its Delete link.
4. A dialog appears in which you must confirm deletion of the product. Click the Yes button.

   **Note:** When a product is deleted, its order history remains in the Marketplace database so that the product will appear in reports.
5.5 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:

<table>
<thead>
<tr>
<th></th>
<th>gray</th>
<th>white</th>
</tr>
</thead>
<tbody>
<tr>
<td>S</td>
<td>S: gray</td>
<td>S: white</td>
</tr>
<tr>
<td>M</td>
<td>M: gray</td>
<td>M: white</td>
</tr>
<tr>
<td>L</td>
<td>L: gray</td>
<td>L: white</td>
</tr>
<tr>
<td>XL</td>
<td>XL: gray</td>
<td>XL: white</td>
</tr>
</tbody>
</table>

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 280.

Adding Product Options

Follow these steps to add product options.
1 From the left navigation menu, navigate to Marketplace Home > [merchant] > Stores > [store] > Store Settings > Products. The Store Products page appears.

2 Select the product’s category from the Choose Product Category dropdown menu. The Store Products page is refreshed with the products from the selected category.

3 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:

```
If no options have been configured, the "Add options" link appears.
```

4 Click the "Add options" link.

The Add Options page appears.

```
5 Select the checkboxes for the options you would like to use.
If you need to add more options, click the More Options button.

6 Enter a name for each option that you selected in Step 5 (or use the default names).
For generic products, the first two options are named "Size" and "Color"; however, you can change these names to meet the needs of your product (such as height, weight, volume, sleeve length, etc.).
For digital products, "File Size" and "File Format" are the first two options. Again, you can rename these options as necessary.

7 For each option that you selected in Step 5, click the "More Values" text link to add text boxes for the desired number of option values.
```
In the next step, you will enter one option value per text box. So you will need to determine how many values are necessary, and then click the "More Values" link until the appropriate number of text boxes are available. Only one value text box appears by default.

For example, if you selected the Color option checkbox, you might now want to enter three values: red, white, and blue. So in this example, you must click the More Values link twice to add two additional text boxes for entering values (for a total of three text boxes).

8 Enter option value names in the text boxes that you added in Step 7. Only enter one option value per text box.

The following screenshot includes notes that describe how to use the Add Options page:

9 Click the Continue button.

The Modifier and Stock Number Settings page appears.

10 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.

11 Click the Continue button.

The Item for Sale page appears.

12 You will need to complete this page 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 Item for Sale page three times.

You must complete the following fields on this page:

- **Price**—For each option combination, you can set a different price. For example, you might need to charge more for an extra-large shirt versus a small shirt (or more for a blue shirt than a white one). The price you enter on this page overrides the price that you entered on Step 1.

- **Stock #**—You must enter a stock number. This number can be a UPC number or any other number of value to your store or organization. Click the Assign Random Number button to have Marketplace automatically assign a stock number. If you manually enter a stock number, you can have Marketplace check to
5.0 Adding Products to a Store

determine if the stock number is already in use: select the "Check to see if stock number is already assigned" checkbox.

- **Limit Quantity?**—(Generic and Donation only) Mark Yes to limit the quantity of the product that a shopper can purchase. If yes, enter the maximum order quantity.

- **Track inventory?**—(Generic and Donation only) Mark Yes to track the product’s inventory. If yes, enter the initial inventory quantity.

- **Back orderable?**—(Generic and Donation only) Mark Yes if a shopper can order the product even when the quantity available is zero.

- **Upload product file**—(Digital only) When you select this link, you can browse to a file and select it for upload. If you added options to the product (such as file format or file size, see Step 12 above), you’ll be able to upload a different digital file for each combination of options.

- **Maximum times customer can request download?**—(Digital only) This option can be used to restrict the total number of times a customer can download a digital file.

- **Time limit for downloading?**—(Digital only) This option can be used to place a time limit—in days—on the period during which the digital product can be downloaded.

- **Auto fulfill?**—This option can be used for any product in which the payment should take place at the time the order is submitted versus when the order is fulfilled. Typically, this option would be used for products in which no shipping is involved, such as donations or digital products. It could also be used for some generic products (e.g., for conference registrations when no materials are shipped to the customer).

**Note:** (For donations only) In order for the recurring payments option to be available, the Auto Fulfill option must be set to Yes. In addition, the recurring payments options must also be selected in the store’s general settings.

- **Item for Sale is not available**—If an option combination (an "Item for Sale") is not valid for your store, or if a combination is not currently available, you can use this checkbox to disable the "Item for Sale." For example, a small blue sweatshirt IS available but a small white sweatshirt is NOT.

**Note:** By completing this page separately for each product option (or combination of options), you can set up different prices and inventory for each option (or combination of options). The "Item for Sale" column describes which option (or option combination) you are currently working on. For example, if you created a product with options for Size and Color, and you assigned black and white as the values for Color and small and large as the values for Size, 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.

13 Click the Continue button when you are finished. You’ll be asked to confirm the addition of the options.

**Modifying Product Options**

Follow these steps to modify product options.

2. Select the product’s category from the Choose Product Category dropdown menu. The Store Products page is refreshed with the products from the selected category.
3. Click the product name text link in the Name column. The Product Settings page appears.

   If options have been configured, the "Manage Options' link appears.

   The "Items for Sale" line lists the available actions. The available actions (when options have been configured) include "View" and "Manage Options."

4. Click the "Manage Options" link.

   The Manage Options page appears.

   The currently configured options will be listed in the Options table. You can take the following actions:
• Click the Edit Option link to edit the corresponding option name and its values.
• Click the Delete Option link to delete the corresponding option.
• Click the Add Option button to add a new option and enter its values.

The following steps focus upon clicking the Edit Option link. If you would like to add options, see "Adding Product Options" above in this same topic. When you click the Edit Options link, the Edit Option page appears.

The Edit Option page allows you to modify the name of the selected option and the names of any existing option values. You can take the following actions on this page:

• Click the Continue button to save any modifications you may have entered.
• Click the Delete Value link to deleted the corresponding option value.
• Click the Add Value button to add a text box for entering another option value. After you enter the value name you can continue adding more option values, or you can click the Continue button if you are done.

The following steps will focus on what happens after you click the Continue button. The Item for Sale Settings page appears.
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" as a Size, then you would complete the Item for Sale page for just the one resulting new Item for Sale.

For the new Item for Sale, you must complete the following fields on this page:

- **Price**—You must enter a price for the new Item for Sale.
- **Stock #**—You must enter a stock number. This number can be a UPC number or any other number of value to your store or organization. Click the Assign Random Number button to have Marketplace automatically assign a stock number. If you manually enter a stock number, you can have Marketplace check to determine if the stock number is already in use: select the "Check to see if stock number is already assigned" checkbox.
- **Limit Quantity?**—(Generic and Donation only) Mark Yes to limit the quantity of the product that a shopper can purchase. If yes, enter the maximum order quantity.
- **Track inventory?**—(Generic and Donation only) Mark Yes to track the product’s inventory. If yes, enter the initial inventory quantity.
- **Back orderable?**—(Generic and Donation only) Mark Yes if a shopper can order the product even when the quantity available is zero.
• **Upload product file**—(Digital only) When you select this link, you can browse to a file and select it for upload. If you added options to the product (such as file format or file size, see Step 12 above), you'll be able to upload a different digital file for each combination of options.

• **Maximum times customer can request download?**—(Digital only) This option can be used to restrict the total number of times a customer can download a digital file.

• **Time limit for downloading?**—(Digital only) This option can be used to place a time limit—in days—on the period during which the digital product can be downloaded.

• **Auto fulfill?**—This option can be used for any product in which the payment should take place at the time the order is submitted versus when the order is fulfilled. Typically, this option would be used for products in which no shipping is involved, such as donations or digital products. It could also be used for some generic products (e.g., for conference registrations when no materials are shipped to the customer).

  **Note:** (For donations only) In order for the recurring payments option to be available, the Auto Fulfill option must be set to Yes. In addition, the recurring payments options must also be selected in the store's general settings.

• **Item for Sale is not available**—If an option combination (an "Item for Sale") is not valid for your store, or if a combination is not currently available, you can use this checkbox to disable the "Item for Sale." For example, a small blue sweatshirt IS available but a small white sweatshirt is NOT.

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 Select the product’s category from the Choose Product Category dropdown menu. The Store Products page is refreshed with the products from the selected category.

3 Click the product name text link in the Name column. The Product Settings page appears.
Chapter 5

If options have been configured, the "Manage Options" link appears.

The "Items for Sale" line lists the available actions. The available actions (when options have been configured) include "View" and "Manage Options."

4. Click the "View" link.

The "View Items for Sale" page appears.

The Product Options page lists all the "Items for Sale" configured for a product. For each "Item for Sale," it shows price, stock #, quantity, and the enabled/disabled status. (So you can also use this page to enable/disable each "Item for Sale.")

The name of the "Item for Sale" will represent the option combinations. For example, if only one option has been set up and this option is Color, then the Item for Sale column will show all the colors (option values) that have been established. If two options have been set up—Color and Size—then the Item for Sale column will show all the possible combinations of these two options. For example, if Color has the values of white and yellow and Size has the values of youth and league, then four Items for Sale will result: 1) white:youth, 2) white:league, 3) yellow:youth, and 4) yellow:league.

5. 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.

You can edit the following fields on this page:

- **Price**—You can modify the price.

- **Stock #**—You can modify the stock number. The number can be a UPC number or any other number of value to your store or organization.

- **Limit Quantity?**—(Generic and Donation only) Mark Yes to limit the quantity of the product that a shopper can purchase. If yes, enter the maximum order quantity.

- **Track Inventory?**—(Generic and Donation only) Mark Yes to track the product’s inventory. If yes, enter the initial inventory quantity.

- **Back orderable?**—(Generic and Donation only) Mark Yes if a shopper can order the product even when the quantity available is zero.

- **Upload product file**—(Digital only) When you select this link, you can browse to a file and select it for upload. If you added options to the product (such as file format or file size, see Step 12 above), you’ll be able to upload a different digital file for each combination of options.

- **Maximum times customer can request download?**—(Digital only) This option can be used to restrict the total number of times a customer can download a digital file.

- **Time limit for downloading?**—(Digital only) This option can be used to place a time limit—in days—on the period during which the digital product can be downloaded.

- **Auto fulfill?**—This option can be used for any product in which the payment should take place at the time the order is submitted.
Chapter 5

versus when the order is fulfilled. Typically, this option would be used for products in which no shipping is involved, such as donations or digital products. It could also be used for some generic products (e.g., for conference registrations when no materials are shipped to the customer).

Note: (For donations only) In order for the recurring payments option to be available, the Auto Fulfill option must be set to Yes. In addition, the recurring payments options must also be selected in the store's general settings.

7 Click the Save button when you are finished. You'll be asked to confirm the addition of the options.

5.6 Using Product Modifiers

A product "modifier" asks the customer for additional information about their order. For example, a modifier could be used to add a monogram to a shirt (the shirt is the product and the monogram is a modifier), or a modifier could be used to collect a lunch preference or a conference session selection when a shopper is registering for a conference (the conference registration is the product and the lunch preference and the session selection are modifiers). The modifier doesn't change the stock number of the product, but it might change the price.

Modifiers aren’t part of the basic product setup. After you add a product, you can edit the product by adding one or more modifiers. Marketplace provides three types of modifiers:

- **Required Selection**—The shopper must make a selection from a dropdown list before they can 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 separate price adjustment can be entered for each dropdown selection.

- **Optional Multiple Select Checkboxes**—The shopper is asked to choose from multiple checkbox options. This response is not required. For example, the shopper might be able to add ingredients to a pizza by selecting these checkboxes. They can choose as many or as few of the options as they prefer. A separate price adjustment can be entered for each checkbox selection.

- **Text Entry**—The shopper is asked to enter a text response to a prompt. For example, if the product is a shirt, the shopper could use this field to enter the monogram that they would like to appear on a shirt. This response can be either required or optional. A price adjustment can be triggered if the customer makes an entry in the text field.

All three types of modifiers have a **frequency** option. This option comes into play when the customer orders the product and selects a quantity of two or more. If you select "Static" as the frequency, uStores will display the
modifier field only once regardless of the quantity ordered. In contrast, if you select "Dynamic" as the frequency, uStores will repeat the modifier field for each quantity ordered. For example, if the product is an event registration, the customer might register multiple people to attend the event. You can use the Dynamic frequency option to repeat the modifier prompt and ask for a name and contact information (or any other information you desire) for each registrant. (For examples of how modifiers are displayed in uStores, see "What the Customer Sees" on page 282.)

In addition, Marketplace provides a way for managing multiple modifiers:

- **Table Builder**—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."

**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:

<table>
<thead>
<tr>
<th>Product</th>
<th>Modifier (and modifier type)</th>
</tr>
</thead>
<tbody>
<tr>
<td>gold ring</td>
<td>engraving (text entry)</td>
</tr>
<tr>
<td>shirt</td>
<td>monogram (text entry)</td>
</tr>
</tbody>
</table>
In all of these modifier examples, the base product remains the same. The modifiers are used to collect additional information. In some cases, the collected data provides information about how the product should be customized for the customer, such as the engraving on the gold ring or the toppings on the pizza. In other cases, the collected data is strictly informational and doesn't cause any customization of the product, such as the attendee name for the seminar.

And here are examples of products with options:

<table>
<thead>
<tr>
<th>Product</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>gold ring</td>
<td>ring size (6, 6.5, 7, 7.5, 8, 8.5, 9, 9.5, 10, &amp; 10.5)</td>
</tr>
<tr>
<td>sweatshirt</td>
<td>size (medium, large, &amp; extra large) and color (black &amp; white)</td>
</tr>
<tr>
<td>dress shirt</td>
<td>sleeve length (short &amp; long)</td>
</tr>
<tr>
<td>seminar</td>
<td>day (Monday &amp; Tuesday) and time (9 a.m. &amp; 2 p.m.)</td>
</tr>
<tr>
<td>pizza</td>
<td>size (9&quot;, 12&quot;, &amp; 15&quot;)</td>
</tr>
</tbody>
</table>

These options require different inventory items ("items for sale"). For more about options, see "Using Product Options" on page 269.

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.
Example 2

In the second example, the first three modifiers (Attendee Name, Attendee E-mail Address, and Attendee Phone Number) are configured with the frequency of "dynamic," so the customer will need to enter this information three times (because the order quantity is 3). The final two modifiers (Session Difficulty and Seating) are configured with the frequency of "static," so these modifiers only ask for one value each.
Example 3
And in the third example, Table Builder has been used to organize the presentation of modifiers into a modal window so that the maximum amount of horizontal real estate in the web browser window becomes available for the display of the modifiers. Notice how the modifiers for Attendee Name, Attendee E-mail Address, and Attendee Phone Number have been grouped in a table. Each line of the table represents an attendee. The attendee modifiers all use the frequency of "dynamic." The final two modifiers (Session Difficulty and Seating) are part of the Table Builder group, but because these modifiers were configured with the frequency of "static," these modifiers only ask for one value each (not three). Table Builder works especially well when customers are ordering multiple quantities of the same product, as typically happens, for example, with event registrations.

Adding a Product Modifier
Follow these steps to add a product modifier.


2. Select the product’s category from the Choose Product Category dropdown menu. The Store Products page is refreshed with the products from the selected category.

3. Click the product name link. The Product Settings page appears. Go to Step 4.

OR
Click the Add link in the Modifiers column for the corresponding product. The Manage Modifiers page appears. Go to Step 5.

4 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 293.

5 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.

6 Enter the modifier information as described in "Using the Add/Edit Product Modifier Pages" on page 286.

Using the Add/Edit Product Modifier Pages

Three types of product modifier pages are available: 1) required selection, 2) optional multiple select checkboxes, and 3) text entry. When you add a product modifier, you select a modifier type (as described in "Adding a Product Modifier" on page 285) and then complete the fields on the corresponding modifier page. The following paragraphs describe how to complete these pages.
• **Required Selection Modifier**—You must enter a name for the modifier and its selection values. For example, you might create a modifier with the name of "customer type" and the selections might be student, alumni, parent, staff, and other. 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.
• **Optional Multiple Selection Checkbox Modifier**—You must enter a name for the modifier and its selection values. For example, you might create a modifier that prompts the customer to indicate which conference extras they would like to receive, such as a tote bag, a pen, and a CD. The customer can select as many checkboxes as appropriate. You can also select whether the modifier should be static or dynamic. The customer will be asked for a static modifier just once, regardless of the quantity ordered, whereas the customer will be asked for a dynamic modifier multiple times, for each quantity ordered.

![Optional Multiple Selection Checkbox](image-url)
• **Text Entry Modifier**—You must enter a name for the modifier and select whether the modifier should be a required or optional field. The "Format Validation" field allows you to specify the format of the entry (numeric, alphabetic, e-mail, date, phone number, etc.) so that validation can take place on the customer’s entry and undesired characters can be eliminated. (For more about format validation, see "Validation Formats for Text Entries" on page 289.) 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.

**Note:** When a shopper purchases a product, a confirmation message is sent to the shopper. This message displays the modifier value. However, if you are collecting sensitive information with the Text Entry modifier (such as a student ID), you should suppress display of the modifier in confirmation e-mail messages by selecting Yes for "Hide Modifier in Confirmation Emails."

### Validation Formats for Text Entries

If you choose the text entry type of product modifier, you will have the opportunity to determine if validation should be performed on the customer’s entry.

The following table defines the validation formats that are available for text entries.

<table>
<thead>
<tr>
<th>Validation Format</th>
<th>Definition/Characters Allowed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Numeric</td>
<td>0123456789</td>
</tr>
<tr>
<td>Validation Format</td>
<td>Definition/Characters Allowed</td>
</tr>
<tr>
<td>---------------------------</td>
<td>---------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Numeric Extended</td>
<td>0123456789-(), [space]</td>
</tr>
<tr>
<td>Alpha</td>
<td>abcdedfghijklmnopqrstuvwxyz&lt;br&gt;ABCDEFGHIJKLMNOPQRSTUVWXYZ&lt;br&gt;abcdeFGHIJKLMNOPQRSTUVWXYZ</td>
</tr>
<tr>
<td>Alpha Extended</td>
<td>abcdedfghijklmnopqrstuvwxyz&lt;br&gt;ABCDEFGHIJKLMNOPQRSTUVWXYZ -(), &amp;[space] ' [single quote]</td>
</tr>
<tr>
<td>Alphanumeric</td>
<td>abcdedfghijklmnopqrstuvwxyz&lt;br&gt;ABCDEFGHIJKLMNOPQRSTUVWXYZ 0123456789</td>
</tr>
<tr>
<td>Alphanumeric Extended</td>
<td>abcdedfghijklmnopqrstuvwxyz&lt;br&gt;ABCDEFGHIJKLMNOPQRSTUVWXYZ 0123456789-(), &amp;[space] ' [single quote]</td>
</tr>
<tr>
<td>Free Text</td>
<td>All characters.</td>
</tr>
<tr>
<td>Email</td>
<td>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.</td>
</tr>
<tr>
<td>Date mm/dd/yyyy</td>
<td>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.</td>
</tr>
<tr>
<td>Date dd/mm/yyyy</td>
<td>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.</td>
</tr>
<tr>
<td>Date yyyy/mm/dd</td>
<td>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.</td>
</tr>
<tr>
<td>US/Canada Phone number</td>
<td>(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.</td>
</tr>
<tr>
<td>Contains Alpha Characters</td>
<td>The entry must include one alphabetic character as specified above for Alpha validation.</td>
</tr>
<tr>
<td>File Name</td>
<td>All characters.</td>
</tr>
</tbody>
</table>
Follow these steps to associate modifiers using the Table Builder.


2. Select the product’s category from the Choose Product Category dropdown menu. The Store Products page is refreshed with the products from the selected category.

3. Click the product name link. The Product Settings page appears. Go to Step 4.

   OR

   Click the Manage link in the Modifiers column of the corresponding product. The Manage Modifiers page appears. Go to Step 5.

4. In the General Settings section at the top of the page, click the "Manage Modifiers" link. The Manage Modifiers page appears.

   **Note:** Before you can use Table Builder, modifiers must have already been configured for the product. If modifiers have not yet been created, see "Adding a Product Modifier" on page 285.

The Modifiers section of the Manage Modifiers page shows the modifiers that have been created. These modifiers are candidates for being used with Table Builder.

5. Select the Table Builder text link in the Add Modifier Group section. The Table Builder page appears.
When you start work on the Table Builder page, the Table Information section is empty. As you build the table, modifiers will appear in this section.

6 Enter a Table Name. Customers will see this name.

7 From the Modifier dropdown list, select a modifier to include in the table and click the "Add Modifier to Table" button.

The modifier that you selected will now appear in the Table Information section.

All modifiers that you have created are included in the Modifier dropdown list. The Table Builder allows you to organize existing modifiers into a tabular format. So be sure you have already created all the modifiers that you would like to appear in the table before you create the table.

After you add modifiers, the Table Information section of the Table Builder page shows the modifiers that are part of the table.

8 Repeat Step 7 for all additional modifiers that you would like to include in the table.
Note: You can remove a modifier from the table by clicking the Remove text link in the Action column.

9 Specify a sort order for the display of the modifier columns by entering a Sort Key number for each modifier.

Note: The sort order determines the column order, left to right.

10 Click the Save button.

Customers will see the associated modifiers displayed in a table when they attempt to add the product to their shopping cart.

Here is an example of what the customers will see:

![Example of modifiers associated with Table Builder]

Here is an example of modifiers associated with the Table Builder.

In this example, the product has five modifiers total. Table Builder was used to place three of these modifiers (Attendee Name, Attendee E-mail Address, and Attendee Phone Number) in a table named "Attendees." The other two modifiers (Session Difficulty and Seating) are NOT part of the table.

Editing a Product Modifier

Follow these steps to edit a product modifier.

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

2 Select the product’s category from the Choose Product Category dropdown menu. The Store Products page is refreshed with the products from the selected category.
3 Click the product name link. The Product Settings page appears. Go to Step 4.

OR

Click the Manage link in the Modifiers column of the corresponding product. The Manage Modifiers page appears. Go to Step 5.

4 In the General Settings section at the top of the page, click the "Manage Modifiers" link. The Manage Modifiers page appears.

5 In the Modifiers section near the bottom of the page, look for the modifier you would like to edit, and then click the Edit link in the Actions column of the corresponding modifier. The Edit Product Modifier page appears.

6 Enter the modifier information and price adjustment(s), as described in "Using the Add/Edit Product Modifier Pages" on page 286. Then click the "Update Existing Modifier" button.

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 Select the product's category from the Choose Product Category dropdown menu. The Store Products page is refreshed with the products from the selected category.
3 Click the product name link. The Product Settings page appears. Go to Step 4.

OR

Click the Manage link in the Modifiers column. The Manage Modifiers page appears. Go to Step 5.

4 In the General Settings section at the top of the page, click the "Manage modifiers" link. The Manage Modifiers page appears.

5 Scroll down to the "Modifiers" section. This section lists all the modifiers that have been added to the product.

6 For the modifier that you need to delete, click the Remove text link in the Actions column. The Delete Product Modifier page appears.

7 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
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5.7 Product Status Management

Store managers and store clerks can use the Product Status Management page to change the status 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 250). Then select the "Manage status" link in the "Ustore status" section. The Product Status Management page then opens.

The Product Status Management page allows you to schedule status changes.

**Updating the Current Product Status**

To update the current status of a product, simply choose a new status from the Store Status dropdown menu in the "Update Current Product Status" section of the Product Status Management page.

The following states are available for the product status:

- **ENABLED**—Once a store is brought online, the product is available for shoppers.
• **DISABLED**—When a product is placed in DISABLED status, shoppers will not be able to see this product.

• **PREVIEW**—Products in preview mode are not available to shoppers. Once placed in PREVIEW mode, a product can only be viewed by using the View link on the Product Details page of the corresponding product. Preview mode can be used to view how a product will look and function before you enable the product.

The choice that you make will immediately affect the availability of the product.

**Using Preview Status**

You can use the preview status to view how a product will look and function before you enable the product. Preview status is particularly important if you have added HTML to the Long Description for a product: you can use preview mode to see how the HTML will be rendered by browsers.

After you have changed the status of a product to PREVIEW, you can view the product by navigating to the Product Details page:


For products in preview mode, a "View" link appears in the "Ustore status" section of the Product Details page.

If a product is in preview mode, a link named "View" appears in the Action column. When you select this link, a new browser window is opened that displays the product.
Chapter 5

Preview mode allows you to see what shoppers will see.

An orange status bar indicates that the store is being displayed in preview mode. You can navigate to categories and products within the store. You can leave preview mode by selecting the Exit Preview Mode button.

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

Scheduling Status Updates

In addition to immediately changing the status of products, you can schedule a status update by using the Schedule Status Update section of the Product Status Management page.

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

To schedule an update to product status, use the following instructions:

1. Select a product status from the "New status" dropdown menu. For more information about the store status options, see "Updating the Current Product Status" on page 296.

2. Enter a date in the "Update Status Date" field (or select the calendar icon to choose a date using the calendar widget). If you enter a date, you must use this format: m/d/yy. For example, enter October 29, 2012 as 10/29/12.
Select an hour from the Update Status Hour dropdown menu. This dropdown shows hours in military time. For example, to choose 11 p.m. as the Update Status Hour, select 23.

Choose the Save Schedule button.

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

<table>
<thead>
<tr>
<th>Update</th>
<th>Scheduled Status</th>
<th>Scheduled Date</th>
<th>Scheduled Hour</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>STORE</td>
<td>OFFLINE</td>
<td>1/10/13</td>
<td>12:00</td>
<td>Delete</td>
</tr>
<tr>
<td>STORE</td>
<td>ONLINE</td>
<td>1/11/13</td>
<td>1:00</td>
<td>Delete</td>
</tr>
</tbody>
</table>

Scheduled status updates appear in this table.

You can remove a scheduled status update by selecting the Delete History link.

5.8 Linking to a Product

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

The URL for a product category uses the following format:

http://[server]/[context]/web/product_detail.jsp?PRODUCTID=[product ID#]

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

Note: Do not include bracket characters in the URL.
6.0 User Groups and Private Stores

Access to Marketplace stores can be restricted to specified user groups. This functionality can be used to create private stores, in which only specified user groups can view specified stores or make purchases from these stores.

This section first describes user groups and private stores and then provides instructions for how to implement this functionality.

6.1 About User Groups and Authentication

User groups are created in Marketplace by an administrator. Marketplace includes two default user groups:

- **Everybody**—All shoppers are part of the "Everybody" group. Stores that use this group do not require shoppers to register or login.

- **Registered Users**—Any shopper who sets up a Marketplace profile automatically becomes part of the "Registered Users" group. Stores that use this group require that shoppers be registered users who are currently logged in.

Most Marketplace installations will only use these two groups.

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

6.2 About Private Stores

A "private store" is restricted to one or more user groups. For example, a store might be restricted so that only students or campus staff members could view the store or make purchases. A store manager can designate the user groups that are allowed in this store. A store manager can also decide whether non-members are allowed to view the store but not make purchases.

Shoppers can access private stores in two ways:

- **As Registered Users**—By becoming registered users of Marketplace, shoppers can enter login credentials that allow them to be recognized as user group members. When users log in to Marketplace, they will
see any private stores that require membership in the user groups to which they belong.

- **By Using Web Links That Provide User Group Authentication**—A user who has already logged in to a campus application does not have to log into Marketplace to see private stores. A web link from the campus application can identify a user group and provide username and password information. Marketplace, in turn, forwards the login credentials to a campus system for authentication. For example, suppose you have defined a "Students" group in Marketplace. If a student logs into another campus application and clicks the link to Marketplace, the student’s username and password (as well as a user group ID) will automatically be forwarded to Marketplace, which then forwards the login credentials to an on-campus system. After the student is authenticated, the student can view and make purchases from any private stores that require membership in the "Students" user group.

### 6.3 Becoming a Registered User and Adding Group Memberships

By becoming a registered user, a shopper can add user group memberships to their account. A shopper can become a registered user by choosing the Marketplace shopping application’s Register link (in the top navigation bar) and completing the fields on the "Create an Account" page (including the username, password, first name, last name, and e-mail address fields).

Once a shopper has become a registered user and signed in to Marketplace, they can add a group membership to their account by navigating to the My Account screen in the Marketplace shopping application (by selecting the My Account link in the top navigation menu) and then selecting Memberships from the selections available on the My Account screen.

![Registered shoppers can choose to add memberships to their account.](image)
The user groups displayed in the Available Memberships list box represent all the user groups established for your implementation of Marketplace. All Marketplace shoppers will see the same list of available user group memberships.

A registered user can add an available membership to their Marketplace account by selecting the appropriate membership displayed in the Available Memberships list box and clicking the Add button. If the user group requires no authentication, the selected user group name moves to the My Memberships list box. If the user group requires authentication, the Membership Authentication page appears, which requires the user to enter a username and password for the group.

After a user is authenticated as a member of a user group, the selected user group name moves to the My Memberships list box. The user can now access any private stores that require membership in this user group. Subsequently, the user must simply log in as a Marketplace registered user in order to use active memberships for accessing private stores.

6.4 How to Establish a Private Store

To set up a private store, the following actions must take place:

1. A system administrator creates an XML transaction that will authenticate the users as belonging to the group.
   
   **Note:** User group setup requires a transaction-based method using TouchNet’s Transaction Manager for authenticating login information against data stored in other campus systems. Instructions on how to create an XML-based transaction are outside the scope of this document.

2. A system administrator adds a new transaction to the Transaction Attributes table in TouchNet Payment Gateway.
   
   **Note:** For schools using TouchNet 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 304.)

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 307.)

5. As part of store setup, the store manager selects which groups are allowed to purchase in the store. The store manager can also decide to let all other shoppers see the store’s products but not purchase them. (See "Allowed Groups" on page 205.)
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6 The store manager defines what payment methods the allowed groups can use in the store. (See "Group Payment Methods" on page 206.)

After these steps are completed, only the allowed groups will be able to purchase from the private store.

6.5 How to Add an Authentication Method

The Marketplace administrator may need to create a new authentication method for a new group. For example, you may already have a way to authenticate students, but not a method to authenticate faculty and staff. In that case, you would need to create a transaction, then an authentication method to verify faculty and staff users.

These steps assume you have an XML-based transaction available to authenticate group members.

Note: The transaction must be recorded in the transaction attributes table for the Transaction Manager that will pass login credentials to the authenticating system. This must be done before you create the authentication method in Marketplace.

To add a new authentication method:


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.

Field Definitions:

Authentication Method Name and Description
The authentication method name will appear in the list of authentication methods that are available when creating a new group (and as an authentication selection for store payment methods). The description appears in the Edit page for authentication methods. It is your description of how the method is to be used.

Transaction Code
Enter the code (number) for the transaction used to authenticate the group’s members. This code should correspond to the number in the transaction attributes table.

TransMgr
Select the name of the Transaction Manager module that will pass the authentication transaction to the host. This is the Transaction Manager
where you have recorded transaction attributes details for your transaction.

**Instructions to Buyer**
These instructions tell the shopper what to enter to log in.

**Logon Prompt**
This text becomes the label for the logon field. In this field, the shopper enters whatever login ID you require.

**Password Prompt**
This text becomes the label for the password field used at login.

**Request XML Logon Tag Name**
Enter the XML tag name used for the logon in your transaction’s request XML.

**Request XML Password Tag Name**
Enter the XML tag name used for the password in your transaction’s request XML.

**Response XML Output Tag Name**
Enter the XML tag name used for the response output that indicates the user is a valid member of the group.

**Response XML Output tag Type**
Enter the type of tag used for the response output that indicates the user is a valid member of the group.

*Note:* A Marketplace administrator can change authentication settings later. To edit the settings, navigate to System Administration > User Settings > User Authentication, then click the Edit link next to the authentication method name.

---

**About Authentication for Banner by Ellucian**

By establishing a user group for Banner by Ellucian, access to Marketplace stores can be restricted to just those users identified by your Banner by Ellucian system. This functionality can be used to create private stores, in which only users identified by your Banner by Ellucian system can view specified stores or make purchases from these stores.

*Important!* Before you can establish an authentication method for Banner, you must complete the steps for establishing Banner integration. These steps include editing the `bannerconnect.prp` file, which is described in *Banner Setup Guide for Marketplace 6.5*. 

---
**Transaction Code**
Enter the following code: **17412**

**TransMgr**
Make the following selection: **bannerconnect**

**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**

---

### 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.

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.

---

*Sample of adding a new student group*
- **Display to Buyer** (My Account pages)—Choose this checkbox to display the group for registered Marketplace shoppers as an "Available Membership" on the My Account screen of the Marketplace shopping application.

- **Authentication method**—Choose the authentication method used to verify that the shopper is a member of the group.

4 Click the Save New Group button.

**Note:** A Marketplace administrator can change group settings later. Navigate to System Administration > User Settings > User Groups, then click the Edit link for the group to update.

### 6.7 How to Link to Marketplace with Group Logins

You can create links from your campus applications so that a user who has already logged in does not have to log into uStores to see private stores. For example, suppose you have defined a "Students" group in Marketplace. If a student logs into another campus application, and clicks the link to uStores, the student will automatically be able to shop in all stores that require a student group membership for purchases.

Follow these steps to add to your web page a form element that passes login information to uStores:

1 Log into the Marketplace Operations Center with administrator’s rights.

2 From the left navigation menu, navigate to Marketplace Home > System Administration > User Settings > User Groups. The uStores Groups page appears.

3 In the list of current groups, locate the group of users who will have logged in through your campus application. Click its Edit link.

4 Note the group ID. You will need to include this group ID in your HTML form element.

5 Log out of the Operations Center.

6 Locate the page in Marketplace you want to link to and note its identifier within the URL:

- To link to the Marketplace home page, the value is index.jsp.
- To link to a store, navigate to that store’s home page. The URL will include `store_main.jsp?STOREID=X`, where X is the store’s ID.
- To link to a category, navigate to its main page. The URL will include `store_cat.jsp?STOREID=X&CATID=Y`, where X is the store’s ID and Y is the category’s ID.
7 In your web page, add a form element where you want your link to Marketplace uStores to appear. In the examples that follow, values to change are shown in bold.

- **Server Name.** In the action attribute, you must enter the name of the server where the Marketplace shopping site is installed.
- **GROUP_ID.** Enter the ID value that you noted for the group in Marketplace.
- **Navigate.** Enter the URL string to link to the home page, a store, or a category.
- **Submit.** Choose whether to use input type="submit", along with a button name of your choice, or input type="image", and specify an image file for your application's link to Marketplace. In the example, the button name is shown as "Shop Our Campus Stores."

8 Save your changes and test the link.

**Important!** You should make sure the link to Marketplace uStores uses https protocol—not http. Otherwise, the login credentials you are submitting via the HTML form will be transmitted as clear text and will not be encrypted.

---

### Form Element Examples

This section shows three sets of form element examples in which user names and passwords are used in combination with a group ID in order to link to a Marketplace store. Replace the values as appropriate for your own store.

#### Linking to the Marketplace uStores Home Page

Here are examples of linking to the Marketplace uStores Home page:

**Example 1** Use the first example if you want both the user name and the password passed when linking to the Marketplace mall home page.

```html
<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="">
</form>
```
Example 2  Use the second example if you want users to re-enter their passwords.

```
<form name="SignInForm" action="https://[server]/ustores/rsbuyer" method="post">
    <input type="hidden" name="START_APP" value="true">
    <input type="hidden" name="JSP_TYPE" value="web">
    <input type="hidden" name="Navigate" value="index.jsp">
    <input type="hidden" name="OnError" value="group_login.jsp?GROUP_ID=X">
    <input type="hidden" name="AUTH_EXTERNAL_USER" value="ActionKey">
    <input type="hidden" name="GROUP_ID" value="Z">
    <input type="hidden" name="USERNAME" value="external system logon">
    <input type="hidden" name="REDIRECT" value="">
    <input type="submit" value="Shop Our Campus Stores">
</form>
```

Linking to a Store’s Home Page

Here are examples of linking to a store’s home page:

Example 1  Use the first example if you want both the user name and the password passed when linking directly to a private store.

```
<form name="SignInForm" action="https://[server]/ustores/rsbuyer" method="post">
    <input type="hidden" name="START_APP" value="true">
    <input type="hidden" name="JSP_TYPE" value="web">
    <input type="hidden" name="Navigate" value="store_main.jsp?STOREID=X">
    <input type="hidden" name="OnError" value="group_login.jsp?GROUP_ID=Z">
    <input type="hidden" name="AUTH_EXTERNAL_USER" value="ActionKey">
    <input type="hidden" name="GROUP_ID" value="Z">
    <input type="hidden" name="USERNAME" value="external system logon">
    <input type="hidden" name="PASSWORD" value="external system password">
    <input type="hidden" name="REDIRECT" value="">
    <input type="submit" value="Shop Our Campus Stores">
</form>
```

Example 2  Use the second example if you want users to re-enter their passwords.

```
<form name="SignInForm" action="https://[server]/ustores/rsbuyer" method="post">
    <input type="hidden" name="START_APP" value="true">
    <input type="hidden" name="JSP_TYPE" value="web">
    <input type="hidden" name="Navigate" value="store_main.jsp?STOREID=X">
    <input type="hidden" name="OnError" value="group_login.jsp?GROUP_ID=Z">
</form>
```
Linking to a Store Category Page

Here are examples of linking to a store category page:

**Example 1** Use the first example if you want both the user name and the password passed when linking directly to a category within a private store.

```
<form name="SignInForm" action="https://[server]/ustores/rsbuyer" method="post">
  <input type="hidden" name="START_APP" value="true">
  <input type="hidden" name="JSP_TYPE" value="web">
  <input type="hidden" name="Navigate" value="store_cat.jsp?STOREID=X&CATID=Y">
  <input type="hidden" name="OnError" value="group_login.jsp?GROUP_ID=Z">
  <input type="hidden" name="AUTH_EXTERNAL_USER" value="ActionKey">
  <input type="hidden" name="GROUP_ID" value="Z">
  <input type="hidden" name="USERNAME" value="external system logon">
  <input type="hidden" name="PASSWORD" value="external system password">
  <input type="hidden" name="REDIRECT" value="">
  <input type="submit" value="Shop Our Campus Stores">
</form>
```

**Example 2** Follow the second example if you want users to re-enter their passwords.

```
<form name="SignInForm" action="http://[server]/ustores/rsbuyer" method="post">
  <input type="hidden" name="START_APP" value="true">
  <input type="hidden" name="JSP_TYPE" value="web">
  <input type="hidden" name="Navigate" value="store_cat.jsp?STOREID=X&CATID=Y">
  <input type="hidden" name="OnError" value="group_login.jsp?GROUP_ID=Z">
  <input type="hidden" name="AUTH_EXTERNAL_USER" value="ActionKey">
  <input type="hidden" name="GROUP_ID" value="Z">
  <input type="hidden" name="USERNAME" value="external system logon">
  <input type="hidden" name="REDIRECT" value="">
  <input type="submit" value="Shop Our Campus Stores">
</form>
```
7.0  The Fulfillment Process

A uStores fulfiller completes order processing by accepting payments, entering fulfillment information, and sending shipment confirmation messages to buyers. Fulfillers with refund and cancel rights can also cancel part or all of a pending order and refund payment for an order.

When you fulfill an order, the buyer receives an e-mail message stating that items have been shipped. If the order was paid by credit card, the e-mail message also confirms the credit card charges.

The fulfiller and the store manager must determine policies for the timing of actual shipments or deliveries with the online fulfillment process. In general, orders should not be fulfilled until the ordered products can be shipped to the customer.

7.1 About Payment Types and Fulfillment

The fulfillment process is affected by the payment type that the customer selected when submitting the transaction.

About Credit Card Payments and Fulfillment

When a fulfiller accepts payment on a credit card purchase, the buyer’s credit card is charged. Charges for shipping and tax are included in this payment.

Important! The buyer's credit card is not charged until the order is fulfilled.

About ACH Payments and Fulfillment

ACH payments are processed through Payment Gateway as soon as the shopper purchases the product. However, Marketplace waits a number of days before allowing fulfillment in case Payment Gateway returns notice that the ACH payment was rejected by the bank. If the specified number of days has passed and no rejection notification from Payment Gateway has been received, then the order can be successfully fulfilled. If the waiting period has not passed, you can process the order only if you are a fulfiller with refund/cancel Rights.

The merchant manager sets a default waiting period at the merchant level. The store manager may override the merchant-level waiting period by entering different waiting periods for individual products. (See "Editing Products" on page 250.)
About Invoice Me and Fulfillment

When a customer chooses the Invoice Me payment method, no assets are exchanged in Payment Gateway. Rather, the customer receives an e-mail message that has been configured for use with Invoice Me (Store General Settings). The store manager can configure these e-mail messages to provide instructions regarding payment. (And therefore the e-mail message serves as the "invoice.")

Orders that use Invoice Me appear on the Fulfillments page for the store. A fulfiller can update the status of these orders. The following payment status values are available: Payment Received, Complimentary, and To Be Paid. Upon updating the payment status, the fulfiller can choose to send an e-mail notification message to the customer.

7.2 Fulfilling Orders

The Marketplace fulfillment process allows you to fulfill multiple orders at the same time (sometimes called batch fulfillment). To fulfill one or more orders, follow these steps:

2. Locate the orders to fulfill.
   
   **Note:** You can refine the orders displayed in the pending orders list. Search by year, by year and month, or by year, month, and day, or you can enter an order number. Click Search to refresh the report.
3. Select the corresponding checkbox for each order that you would like to fulfill.
   
   **Note:** Orders that are still subject to the waiting period for ACH payments are indicated by a red X. If the waiting period has not passed, you can process the order only if you are a fulfiller with refund/cancel Rights.

   **Important!** We strongly recommend that you do not attempt to fulfill more than 20 orders at a time. The process of fulfilling large numbers of orders can take several minutes to complete. If the browser timeout limit is reached, the fulfillment page will not update properly.

4. Click the Process Fulfillment button. The Accept Payment page opens.
5. Review the displayed order information.
6. Click the Accept Payment button to verify the charges. If you notice any incorrect order information on the Accept Payment page, see "Cancelling an Order or Changing Order Quantity" on page 316.
Note: If you see error messages after clicking the Accept Payment button, see the TouchNet Client Community for information on 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 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 316).

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 TouchNet Client Community for information on the error message.
Fulfilling Invoice Me Orders

If any Invoice Me orders have been received, a separate section named Invoice Me Payment Status appears near the bottom of the Fulfillments page.

Invoice Me orders that require fulfillment appear in both the Pending Fulfillments section AND the Invoice Me Payment Status section. When you fulfill an Invoice Me order, you will be given the opportunity to update the payment status as part of the fulfillment process (as described in "Fulfilling Orders" on page 314); 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 and not in the Pending Fulfillments section.

To update the payment status of an Invoice Me order, follow these steps:

2. Scroll down the page to the "Invoice me Payment Status" section.
   
   Note: All outstanding orders with a payment method of Invoice Me appear in this section. These orders initially appear with the status of "To Be Paid."

3. Select the corresponding checkbox for each Invoice Me order that you would like to update.
4. Click the Process Invoice Me button.
5. Review the displayed order information.
6. Select a payment status from the Invoice Me Payment Status dropdown list. The following status values are available: To Be Paid (which is the default value), Payment Received, and Complimentary. If you change the status to Payment Received or Complimentary, the order will be considered completed.
7. Click the Update Payment Status button.

7.3 Cancelling an Order or Changing Order Quantity

To cancel an order, or to change the quantity of an item ordered, the fulfiller must initiate the fulfillment process, as described in steps 1 through 3 of "Fulfilling Orders" on page 314. 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:


   **Note:** The list of orders displayed on the Fulfillment List page can be modified by using the fields at the top of the page. You can show orders "pending for" a specified time period (year, month, or day). You can show orders that were "ordered in" a specified time period. And you can show orders that were "fulfilled in" a specified time period. In addition, you can search for a specific order by entering an order number.

2. Select the corresponding checkbox for each order that you would like to cancel or change.

3. Click the Process Fulfillment button. The Accept Payment page opens.

4. To change the quantity ordered, use the New Quantity dropdown list to select a new order quantity. You can only reduce the quantity ordered. You cannot increase the quantity. To cancel an entire order of an item, change its quantity to zero.

   **Note:** The New Quantity dropdown list does not appear for orders processed with ACH payments until the ACH wait days have expired.

5. Click the Update Items button. The updated amounts are now reflected. If you reduce the quantity to zero, the product is removed from the order.

6. For any additional items that must be removed from the displayed orders, repeat steps 4 and 5.

   **Note:** If you remove all items from an order, a cancel-order e-mail message is automatically generated and sent to the customer.

7. If the displayed orders still contain purchase items, you can continue processing the orders by clicking the Accept Payment button.

   **Important!** To cancel the order of an individual item, the fulfiller must change the quantity ordered to zero.

If multiple items have been ordered and the entire order needs to be cancelled, the fulfiller must change the order quantity to zero for each order item.
If multiple items have been ordered and some items must be cancelled while others must not be cancelled, the fulfiller must change the order quantity to zero for each item that must be removed from the order while leaving the other items in the order (by not changing their order amount to zero). As the fulfiller precedes through the fulfillment process, the cancelled items will be removed from the order. If items remain in the order, the fulfiller can continue with the fulfillment process.

**Note:** When you change the quantity ordered to zero for all items in an order, the buyer will be automatically notified via e-mail that their order has been canceled. If you change the order quantity to any value other than zero, the buyer will not be automatically notified that their order quantity was changed. However, the buyer will see the updated order quantity when they receive the fulfillment e-mail message. If your policies require that you notify the buyer when the order quantity is changed to a value other than zero, you must send this communication manually. The Buyer Info section of the Order Fulfillment page includes the buyer’s e-mail address.

### 7.4 Working with Backordered Items

The store manager or store clerk may flag some items as "backorderable." In this case, shoppers can buy the product even when the online quantity available is zero.

In general, you should not fulfill an online order until you are able to ship the actual item. If you have cancel rights, you can also communicate with the buyer about changing the quantity ordered so that the remainder of the order can be shipped more quickly.

Communicate products’ backorder status and unavailable inventory to the store manager.

### 7.5 Processing Refunds

A fulfiller with refund/cancel rights can process refunds for completed orders, crediting credit card purchases back to the buyer’s credit card and ACH purchases back to the buyer’s bank account. The fulfiller can decide how much to refund to the customer, up to the amount of the original purchase. Shipping costs can also be refunded.

As well as refunding a dollar amount to the customer, Marketplace’s refund functionality can be used to update the quantity of items being returned. Updating the quantity field is especially important for products in which the stock quantity is being tracked. A dollar amount can be refunded either with or without updating the item quantity. Likewise, the item quantity can be updated either with or without refunding a dollar amount.
After refunds are processed, Marketplace will automatically generate and send an e-mail message to the customer. This e-mail message details the credited amount and/or the quantity of items returned.

**Note:** Only a fulfiller with refund/cancel rights can process refunds.

---

**Using the Fulfillment List Page**

The Fulfillment List page appears when a user with fulfiller rights selects a store’s Fulfill Orders link in the left navigation menu. The Fulfillment List page initially shows all the orders awaiting fulfillment for a specific store. To display orders that have already been fulfilled—and thus can be refunded—you will need to modify the list of orders displayed on the Fulfillment List page.

A fulfiller can modify the list of orders displayed on the Fulfillment List page in the following ways:

- by entering a date range,
- by selecting the type of orders to display (pending, ordered, or fulfilled) with the Show Orders dropdown list, and
- by searching for a specific order by entering an order number in the Search by Order # field.

**Note:** The Show Orders dropdown list provides three choices: 1) pending for, 2) ordered on, and 3) fulfilled on. "Pending for" orders have not yet been fulfilled and cannot be refunded. "Ordered on" orders may include orders that were fulfilled as well as orders that have not yet fulfilled. "Fulfilled on" orders include only orders that have been fulfilled.

Once you locate an order to be refunded, you can initiate the refund process by selecting the order’s View Details button. Only orders that have already been fulfilled have a View Details button.

---

**Using the Fulfillment Details Page**

The Fulfillment Details page provides information about a specified order that was fulfilled and includes functionality that allows a fulfiller with cancel/refund rights to issue a refund.

On the Fulfillment Details page, each item in the fulfilled order appears on a separate line. On each item line, two fields pertain to refunds: 1) Refundable Amt and 2) New Quantity to Return. In addition, if shipping charges apply, the shipping amount appears in the Refundable Shipping Amt field.

For a fulfiller to process a dollar amount refund for the item purchased, a dollar amount greater than zero must appear in the Refundable Amt field. Likewise, for a fulfiller to process a dollar amount refund for shipping, a dollar amount greater than zero must appear in the Refundable Shipping Amt field.

The fulfiller can decide how much to refund to the customer for each item in the order, up to the amount listed in the Refundable Amt field. For
shipping refunds, the fulfiller can decide how much to refund for the order, up to the amount in the Refundable Shipping Amt field.

The fulfiller enters the dollar amount in the Refund Amt field for each separate item in the order. In addition, the fulfiller can enter a dollar amount for shipping in the Refund Amt field in the shipping section of the order.

As well as refunding a dollar amount to the customer, Marketplace’s refund functionality can be used to update the quantity of items being returned. Updating the quantity field is especially important for products in which the stock quantity is being tracked. A dollar amount can be refunded either with or without updating the item quantity. Likewise, the item quantity can be updated either with or without refunding a dollar amount.

**Note:** Only a fulfiller with refund/cancel rights can process refunds.

### Processing a Refund

A fulfiller with refund/cancel rights can process refunds for completed orders, crediting credit card purchases back to the buyer’s credit card and ACH purchases back to the buyer’s bank account. The fulfiller processes a refund by using the following steps:


2. Select Fulfilled Date or Ordered Date from the Show Orders dropdown list, and then select a date range to search. Click the Search button. The Fulfillment List page is updated to display the orders that meet the criteria that you entered.

   **Note:** If you know the specific order number to refund, you can alternately enter the order number in the "Search by Order #: field and then click the Search button.

3. Locate the order in the displayed list and click its View button. The Store Fulfillment page appears.

   The New Quantity to Return field will be editable for each item in the order. Other editable fields for refunds may appear depending on how the store has been configured.

**Important!** The Refund Amount field only appears if partial refunding has been enabled (by setting the "Allow Partial Refunds" option to Yes on the Store General Settings page). If this option has been set to Yes, the Refund Amount field will be editable for each item in the order. Likewise, shipping cost refunds are only available if "Allow the Refunding of Shipping" is set to Yes on the Store General Settings page.
The Fulfillment page includes the Refund Amount field if the "Allow Partial Refunds" option has been set to Yes on the Store General Settings page. This page also includes fields regarding shipping refunds if "Allow the Refunding of Shipping" is set to Yes on the Store General Settings page.

*New Quantity to Return* is the only editable field in the Process Refund section of the Fulfillment page if both "Allow Partial Refunds" and "Allow the Refunding of Shipping" are set to No on the Store General Settings page.

4 For each item in the order, select the quantity of items to return from the New Quantity To Return dropdown list. The quantity that you enter for an item will be added to the inventory count for the product.

If partial refunds are allowed, please keep the following guidelines in mind:

- The "New Quantity to Return" field can be updated either with or without also entering a refund amount.
- The "Refund Amount" field can be updated either with or without also entering a quantity to return.
• Updating the "New Quantity to Return" field is optional and only relevant if the store tracks the inventory of the purchased item.

If partial refunds are NOT allowed, please keep the following guideline in mind;

• Updating the "New Quantity to Return" field is the ONLY way to initiate a refund for the cost of the purchased item.

If shipping refunds are allowed, please keep the following guideline in mind;

• You can initiate a shipping refund without also entering either a "New Quantity to Return" or a "Refund Amount."

5 (If applicable) Enter a purchase amount to refund in the Refund Amount field. You can enter a separate refund amount for each item in the order. (The "Refund Amount" field only appears if "Allow Partial Refunds" is set to Yes on the Store General Settings page.)

Please keep the following guidelines in mind:

• A purchase refund is possible if the amount displayed in the "Total amount available to refund" field is greater than zero.

• You cannot enter a dollar amount in the "Refund Amount" field that is greater than the value displayed in the "Total amount available to refund" field.

• The Refund Amount field is NOT a required field. That is, you can return items without refunding any amount to the customer.

• You can issue a refund without returning any items to inventory.

6 (If applicable) Enter a shipping amount to refund in the Refund Amount field of the order's shipping section. (This option only appears if "Allow the Refunding of Shipping" is set to Yes on the Store General Settings page.)

Please keep the following guidelines in mind:

• A shipping refund is possible if the amount displayed in the "Refundable Shipping Amt" field is greater than zero.

• You cannot enter a dollar amount in the "[Shipping] Refund Amount" field that is greater than the value displayed in the "Refundable Shipping Amt" field.

7 Click the Process Refund button.
7.6 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.

7.7 About Authorizing Credit Cards at Order Time

A Marketplace merchant (and all the stores under that merchant) can be set to use Marketplace's "Authorize Credit Card at Order Time" functionality. This functionality is available on the Add Marketplace Merchant page, as well as the Marketplace Merchant Settings page.

When this option is selected and a customer chooses to use a credit card for payment, the customer’s credit card is encumbered at the time an order is submitted. If the credit card information is invalid or insufficient funds are available, the customer is immediately notified during the checkout process. The customer can then edit the order’s payment information.

When a credit card is encumbered, a hold is placed on the customer’s credit card. The transfer of funds does not take place until a subsequent settlement request is received by the credit card processor. Until then, however, the customer’s credit card will be encumbered for the full amount of the transaction. (Credit card settlement is the process by which authorized transactions are submitted to card issuers for payment.)

Orders that Require Fulfillment

During the fulfillment process, when credit card settlement takes place, the original authorization is used for the credit card settlement process (unless
72 or more hours have passed since the original authorization, in which case see "Automatic Authorization Cancellations" below).

**Orders that use Auto Fulfillment**

When Marketplace receives an order for a product that uses the Auto Fulfill option, Marketplace first sends an authorization request to Payment Gateway and immediately follows the authorization request with a settlement request (after Payment Gateway receives acknowledgement of the authorization and provides an identifying number).

Products that use the Auto Fulfill option do not go through the fulfillment process.

**Automatic Authorization Cancellations**

According to the policy requirements of credit card companies, an authorization that has not been settled must be canceled before 72 hours have passed. Accordingly, Marketplace will automatically cancel these authorizations before the time period expires.

**Note:** For schools with on-campus installations of Marketplace, the default time (in hours) in which credit card authorizations will be automatically cancelled can be modified by editing the HoursToReverseAuthorizations setting in the Admin critical.prp file. However, be sure to contact your credit card processor before changing this value. All customers in the TouchNet DataCenter are required to use the default 72 hour period.

When you fulfill an order that uses the "Authorize Credit Card at Order Time" option, the resulting actions taken by Marketplace (and Payment Gateway) depend on the number of hours that have passed. If the original authorization period has not elapsed, then the original authorization goes through the credit card settlement process.

If the original authorization period has passed, the order is still available for fulfillment. However, when the order is fulfilled, another authorization will be sent for the customer's credit card. As a result the credit card will be encumbered again (briefly), and immediately afterwards, the authorization will go through the settlement process.
8.0 Automatic E-mail Messages

When customers submit an order, they receive an e-mail message that confirms the store received the order. Likewise, when an order is fulfilled, the customer receives an e-mail message that indicates the customer’s credit card or bank account has been billed and the items have been shipped. Another type of message is sent when the customer cancels an order. The announcement section of these three message types can be customized as described in "Editing E-mail Messages" on page 328. These e-mail messages are sent in HTML format.

In addition to editing the messages described above, confirmation messages for recurring payments can be customized. These e-mail messages are sent in text format.

8.1 Examples of E-mail Messages

Here is an example of an order confirmation e-mail message:
You have received this email in response to your order:

**Your on-line order (#192)**

**Thank you for shopping at YourCampus Shopping.**

102.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

<table>
<thead>
<tr>
<th>Item</th>
<th>Stock Number</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Detail Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>T-Shirt with football logo: Large: Green</td>
<td>1485508</td>
<td>3</td>
<td>$15.00</td>
<td>$45.00</td>
</tr>
</tbody>
</table>

Subtotal: $45.00

Shipping: $11.00

Tax: $4.98

Total: $60.98

For questions, comments, or order status, send email to email_me and refer to Order 192.
Here is an example of a fulfillment e-mail message:

![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.

Payment 192
Store: Campus Wear
Date/Time: March 14, 2013 3:22:15 PM CDT
Total: $60.98

**Billed To:**  
John Doe  
15520 COLLEGE BLVD  
LENEXA, KS  
66219-1353  
United States

**Ship To:**  
John Doe  
15520 COLLEGE BLVD  
LENEXA, KS  
66219-1353  
United States

**Contact Email:**  
gjohnson@touchnet.com

**Payment Information:**  
Payment Type: Credit Card  
Credit Card Number:  
Card Type: Visa  
*** Card Not Present ***

**Shipping Information:**  
Shipping Number: 195  
Delivery Method: USPS Express Mail

<table>
<thead>
<tr>
<th>Item Description</th>
<th>Stock Number</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Detail Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>T-Shirt with football logo</td>
<td>S14E8S8E_5</td>
<td>3</td>
<td>$15.00</td>
<td>$45.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subtotal:</td>
<td></td>
<td></td>
<td>$45.00</td>
<td></td>
</tr>
<tr>
<td>Shipping:</td>
<td></td>
<td></td>
<td>$11.00</td>
<td></td>
</tr>
<tr>
<td>Tax:</td>
<td></td>
<td></td>
<td>$4.98</td>
<td></td>
</tr>
<tr>
<td>Total:</td>
<td></td>
<td></td>
<td>$60.98</td>
<td></td>
</tr>
</tbody>
</table>

For questions, comments, or order status, send email to email@touchnet.com and refer to Order 192.
Visit us on our web at onlinehere.
And here is an example of a cancel-order e-mail message:

![Refund Information](image.png)

And here is an example of a recurring payment message:

Hello,

This is an automated message to inform you that your scheduled payment has been completed successfully. Payment details are listed below. Please note that all payments are subject to approval and final verification.

-------- PAYMENT DETAILS --------
Customer Name --- John Doe
Payment Date --- 2008-12-30 01:20:08
Amount --- $330.00
Payment Method --- MasterCard
Payment Gateway Reference Number --- 53565635656
System Tracking ID --- 1113
---------------------------------

Sincerely,
University Billing Department

8.2 Editing E-mail Messages

You can add an announcement to three types of store e-mail messages: order confirmations, fulfillment confirmations, and cancellation confirmations. The announcement appears at the top of each of these message types. The remainder of the messages contain transaction information and cannot be edited.

You likely already entered text for the E-mail Order Announcement, the E-mail Fulfillment Announcement, and the E-mail Cancel Order...
Announcement when you established your store. However, you can edit text used in these e-mail messages by using the following instructions:


2. The text that you enter in the Email Order Announcement field will appear near the top of order confirmation e-mail messages. This text can serve as a short message from your store to the customer. All customers receive the same Email Order Announcement in their order confirmation e-mail message. The order details appear after the Email Order Announcement text. For an example of the order confirmation e-mail message, see "Examples of E-mail Messages" on page 325.

3. The text that you enter in the Email Fulfillment Announcement field will appear near the top of fulfillment e-mail messages. These messages are sent to customers after their orders have been fulfilled. The Email Fulfillment Announcement can serve as a short message from your store to the customer. All customers receive this same announcement in their fulfillment e-mail message. The order details appear after the Email Fulfillment Announcement text. For an example of the fulfillment e-mail message, see "Examples of E-mail Messages" on page 325.

4. The text that you enter in the Email Cancel Order Announcement field will appear near the top of cancel-order e-mail messages. These messages are sent to customers after items in their orders have been canceled during the fulfillment process. The Email Cancel Order Announcement can serve as a short message from your store to the customer. All customers receive this same announcement in cancellation e-mail messages. The order details appear after the Email...
Cancel Order Announcement text. For an example of the cancellation e-mail message, see "Examples of E-mail Messages" on page 325.

5 Click the Save Changes button.

**Editing Recurring Payment E-mail Messages**

In addition to editing the three types of e-mail messages described above, you can also edit the recurring payment e-mail messages. However, these messages can only be changed by directly editing the template files. These files can be found in the following location: `touchnet\marketplace\sys\tmsrecur`. Look for the following three files:

- `success_template.txt`
- `failure_template.txt`
- `error_notification_template.txt`

**Note:** If these files need to be edited, you should contact your Marketplace administrator. These files cannot be edited with the Marketplace Operations Center.

Here is an example of the `success_template.txt` file.

```
Hello,

This is an automated message to inform you that your scheduled payment has been completed successfully. Payment details are listed below. Please note that all payments are subject to approval and final verification.

========== PAYMENT DETAILS ========== 
Customer Name --- {{/TOUCHNET/PAYMENT_METHOD/ADDRESS[@TYPE='billing']/NAME}}
Payment Date --- {{__DATE__}}
Amount --- {{__AMOUNT__}}
Payment Method --- {{/TOUCHNET/PAYMENT_METHOD/HSA_PMT_METH_NAME}}
Payment Gateway Reference Number --- {{__REFERENCE_NUMBER__}}
System Tracking ID --- {{__ORDER_ID__}}

=================================
Sincerely,
University Billing Department
```

You can edit any character in the template except for the value declarations in double curly brackets {{ }}. In a similar fashion, you can also edit the `failure_template.txt` and `error_notification.txt`.

**Important!** Be sure not to edit the value declarations in double curly brackets or you may disable e-mail messages for recurring payments.
8.3 uStores E-mail Addresses

The e-mail address that will be used as the "from" addresses for Marketplace uStores e-mail messages depends on the types of e-mail messages being generated. The following table describes each type of Marketplace uStores e-mail message and defines which e-mail addresses are used.

<table>
<thead>
<tr>
<th>Message type</th>
<th>&quot;From&quot; e-mail address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order confirmation</td>
<td>Uses the &quot;From address for e-mail messages&quot; field on the Store General Settings page. If this field has not been configured for the store, then this value comes from the email.FromAddress parameter in the uStores critical.prp file.</td>
</tr>
<tr>
<td>Fulfillment confirmation</td>
<td>(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.)</td>
</tr>
<tr>
<td>Cancellation confirmation and refund confirmation</td>
<td></td>
</tr>
<tr>
<td>Store &quot;Contact Us&quot; link</td>
<td>Uses the &quot;To address for Contact Us e-mail&quot; field on the Store General Settings page.</td>
</tr>
<tr>
<td>Mall/Cart &quot;Contact Us&quot; link</td>
<td>Uses the &quot;Default contact email address for the site&quot; field on the Admin General Settings page.</td>
</tr>
<tr>
<td>Recurring payment confirmation (both uStores and uPay)</td>
<td>All recurring payment confirmations for all Marketplace merchants—for both uStores and uPay—use the same &quot;from&quot; e-mail address. This e-mail address can be configured with the AliveCheck.mail.from field in the tmsrecur.prp file.</td>
</tr>
</tbody>
</table>

**About Recurring Payments Announcements**

All recurring payment confirmations for all Marketplace merchants—for both uStores and uPay—use the same "from" e-mail address. This e-mail address can be configured with the AliveCheck.mail.from field in the tmsrecur.prp file.
Part 5: Building and Managing uPay Sites
9.0 What is uPay?

The uPay features of Marketplace allow you to configure online payment pages that you can connect to your existing campus web applications. You configure your uPay sites for handling specific transactions. For instance, you might have one uPay site take alumni donations and another take payments for conference registrations.

Whereas Marketplace’s uStores functionality allows you to create stores and product pages (and provides shopping cart and checkout functionality), Marketplace’s uPay functionality focuses only on the payment pages. You build the product pages in your campus application external to uPay. The web application then calls the uPay site when it’s time for a payment to be accepted. uPay allows you to make site layout choices and upload images so that a consistent look and feel can be maintained with your campus application.

In this section, we provide an overview of how a uPay site can be established and discuss what uPay users see when making payments. This section also describes the elements that can be customized on each uPay page. (Because uPay sites are highly configurable, your uPay pages will be similar but not identical to our examples.)

9.1 An Overview of uPay

uPay is designed to be integrated with a campus web application. This campus web application can take many forms. It can be a single-product web site (e.g., for selling parking passes). It can be a store with multiple products (e.g., for selling athletic clothing). It can be an alumni group that accepts donations. In fact, the uses to which uPay can be applied are only limited by your imagination.

The campus web application totals the customer’s purchase—including any applicable taxes, shipping charges, and other fees—and forwards this total dollar amount to uPay. For donations, the campus web application does not necessarily pass a dollar amount to a uPay site. The customer might set the dollar amount once they reach the uPay site. For both products and donations, uPay processes the customer’s total payment.

For uPay to integrate with a campus web application, the campus web application must be able to pass parameters that describe the transaction. At a minimum, the campus web application must pass a uPay site ID that identifies which uPay site will handle the transaction. In addition, in order for a transaction to be identified and tracked, the campus web application must pass a transaction ID (called EXT_TRANS_ID by uPay), and this ID can be used by the campus organization to identify the order (or the donation). The customer then chooses a payment method and enters payment information, such as a credit card number and an expiration date (or a bank routing number and a bank account number). After the payment is
processed by uPay (and Payment Gateway), uPay can pass information about the transaction back to the campus web application.

The campus web application can store a great deal of information about the customer and the transaction, including product IDs, customer name, mailing address, e-mail address, etc. This information can be passed to uPay, which in turn can forward this information back to the campus web application after the transaction is processed.

For example, a campus web application could allow a student to enter information that initiates a transaction, such as requesting a parking pass or reserving a spot in a seminar. The campus web application might store the student’s name, student ID, e-mail address, and mailing address. This transaction would be marked with a pending status in the web application. Meanwhile, the web application would pass parameters to uPay that identify and describe the transaction. The uPay site would accept the customer’s payment and pass information about the transaction back to the campus web application by way of a posting URL.

The posting URL points at the campus web application that initiated the transaction. When a posting URL is used, uPay posts parameters regarding the transaction back to the campus web application, allowing the application to change its record of the payment status to completed or cancelled.

**Note:** Campus web applications do not necessarily need to pass a transaction ID to uPay; however, without a transaction ID the campus organization will have no way to match payment information with customer information. In effect, the campus organization would be accepting payments blindly, which might be acceptable for donations; however, even with donations, the campus organization would almost certainly want to track information about the donor beyond the payment fields required for monetary transactions in uPay.

### uPay User Roles

The following user roles are available for uPay sites:

- Site Manager
- Payment Clerk
- Accountant
9.2 What uPay Customers See

This section describes each of the uPay site pages that your customers will see and explains which parts of these pages are configurable.

All uPay Pages

The following notes describe the general site features that appear on all uPay pages:

<table>
<thead>
<tr>
<th>uPay User Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>User Role</strong></td>
</tr>
<tr>
<td>Site Manager</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
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<tr>
<td></td>
</tr>
<tr>
<td>Payment Clerk</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Accountant</td>
</tr>
</tbody>
</table>

**Note:** Accountants cannot make any changes to uPay site settings or assign user roles.
• **Header image**—You can upload a header image. This image will appear at the top of all the uPay site pages.

• **Footer image**—You can upload a header image. This image will appear at the top of all the uPay site pages.

• **Side banner**—You can upload a header image. This image will appear at the top of all the uPay site pages.

• **Bottom navigation bar links**—You can enter the link text that will appear for the following three links in the bottom navigation bar: privacy policy, help, and accessibility. You can also turn on and off the display of these links.

In addition to customizing a uPay site with image uploads, you can also modify the backgrounds, borders, font families, and much more that have been assigned to page elements by modifying the uPay site's style sheet. For more about style sheets, see "uPay Style Sheets" on page 349.

### The Payment Method Selection Page

When the user clicks the payment link in your application, the first uPay payment page displayed for the customer is the Payment Method Selection page:
In the Payment Method Selection page, the user selects a payment method and amount.

For the Payment Method Selection page, you can also customize these features:

- **Message text**—You create the message text that appears above the payment fields.
- **Payment methods**—You choose the payment methods available to users.
- **Payment amount**—You can enter a default payment amount that appears in the payment amount field. You can also define the minimum and maximum payment amounts allowed.

  **Note:** You can also pass the payment amount to uPay from your application or web site. See "Form Parameters" on page 385.

- **Allow recurring payments**—You can choose whether your site will accept recurring payments. A recurring payment is a payment that is repeated at specified intervals. You can enter the text that will be used to ask customers whether they would like to make recurring payments.

The **Additional Donation Page**

If the uPay site has been configured to offer an "additional donation" option to the customer, this page appears with a description of the additional donation option and payment fields.
On the Additional Donation page, users can choose to make an additional donation to the described fund/cause.

For the Additional Donation page, you can also customize these features:

- **Name of the additional donation**—You name the donation fund/cause.
- **Prompt text displayed to the customer**—You enter the prompt text that will be displayed to the customer.
- **Description text**—You enter the description text that describes the donation fund/cause for customers.
- **Donation options**—You choose whether to display set donation amounts to customers or to use an entry box in which the customer can enter their own donation amount.

**The Electronic Banking Information Page**

This page allows the user to select Checking or Savings as the bank account type and enter the corresponding account information.
In the Electronic Banking Information page, users give bank account information.

For the Electronic Banking Information page, you can also customize these features:

- **Message text**—You create the message text that appears above the bank account fields.

- **Address verification**—If you require address information to be entered, the user will be prompted to fill in street address, city, state, and zip code fields.

  **Note:** Depending on how Payment Gateway has been configured, requiring data may result in the failure of transaction with incorrect data.

- **Verification account number**—If you require it, the user must enter the bank account number twice. This helps prevent rejected payments errors due to mis-typed account numbers.

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**The Credit Card Information Page**

This page allows the user to select the credit card type and enter the corresponding credit card information.
In the Credit Card Information page, users give credit card account information.

For the Credit Card Information page, you can customize these features:

- **Message text**—You create the message text that appears above the credit card fields.

- **Card Type**—When you set up the allowed payment methods, you choose which credit cards will be available to customers. While the Payment Selection page only shows two choices—1) Credit Card and 2) Bank Account—the Credit Card Information page shows all the credit card type choices (i.e., Visa, MasterCard, American Express, Discover, etc.).

- **Card Verification Value**—You can require users to enter the card verification value. This number is printed on the credit card, usually above the signature area or above the imprinted number.

  **Note:** Requiring data does not result in the failure of transactions for incorrect data.

- **Email Address**—You can require customers to enter an e-mail address.

- **Address verification**—If you require address information to be entered, the user will be prompted to fill in street address, city, state, and zip code fields.

  **Note:** Requiring data does not result in the failure of transactions for incorrect data.

**The Recurring Payments Page**

The Recurring Payments page allows the user to select the frequency of
payments and the payment dates.

On the Recurring Payments page, the user confirms the payment amount, selects the frequency for the payments, and enters the beginning and end payment dates.

If the user enters a different amount here than the amount on the Payment Method Selection page, then the new amount will be used for all payments.

Note: The frequency, start date, and end date can be passed as input parameters to the uPay site from your application or web site. An additional input parameter determines whether the customer can modify the recurring payment values that are passed as input parameters. For more information, see "Form Parameters" on page 385.

For the Recurring Payments page, you can set the following option.

- **Accepted frequencies**—You decide what choices appear in the dropdown labeled, "How often will your payment recur?" The full range of choices includes weekly, monthly, bi-monthly, quarterly, semi-annually (twice a year), and annually.

- **Maximum duration**—The time period specified with the "Date of First payment" and "Date of last payment" fields must be equal to or less than the maximum duration specified in the configuration settings for the uPay site. If the customer enters a date range that exceeds the maximum duration, uPay will prompt the customer to modify the date range.

**The ACH Agreement Page**

Users who are paying through a bank account are required to sign an ACH agreement. Your ACH agreement performs two functions. It is your statement of terms and conditions for electronic payments. It is also your
stored evidence of payment and the identity of the payer.

The ACH agreement page will appear after recurring payment choices are made. If there is no recurring payment, it will appear after the bank account information is entered.

In the ACH Agreement page, the user reviews and agrees to payment terms.

For the ACH agreement page, you can customize these features:

- **Message text**—You create the message text that appears above the ACH Agreement.

- **The ACH agreement**—The ACH agreement for recurring payments is customized within uPay site setup. However, the ACH agreement for single payments is customized in the merchant settings to ensure that the same agreement is used for all single ACH payments under the same merchant.

- **The shared secret value prompt**—You determine if a shared secret value is required for ACH transactions. A shared secret value is a value that the customer knows, for instance, a birth year or the last four digits of an ID number. While the shared secret value is not required by uPay, it is a requirement of the NACHA rules for web-based ACH payments. Having customers enter a shared secret value increases security of payments through electronic bank accounts.

You can choose the wording that appears as the shared secret value prompt. This prompt appears to the left of the shared secret value field.
The Credit Card Verification Page

The Credit Card Verification page appears after the user enters the credit card information and recurring payment information, if any.

The user verifies credit card information, then clicks Continue.

The message text is customizable on the Credit Card Verification page.

- Message text—You create the message text that appears above the credit card information.

The Receipt Page

The Receipt page appears for successful payments, after the user has either signed the ACH agreement or verified credit card information.
The Receipt page is the last step in the uPay process.

For the Receipt page, you can customize these features:

- **Message text**—You create the "thank you" message text that appears above the transaction information.

- **Contact info for recurring payments**—Because these payments continue into the future, the user may need to contact someone about changes to the upcoming payments. You provide the name, phone number, and e-mail address of this contact.

- **Success link**—You customize the text of this link and the URL to go to when the link is clicked.

### 9.3 Planning Ahead for uPay

Before you start using Marketplace to build your uPay site, you should first consider the various payment settings, as well as the customizable page text and text links. You should consider the available page layout options and have prepared images that can be used for the header and (if necessary) the footer and side banner.

Marketplace provides you with a wide range of settings so that you can customize your uPay site to best meet the needs of your school or campus organization. This section provides an overview of the available payment settings and the site customization options.
Payment Options

Marketplace provides you with a wide array of options for determining how your uPay site will handle payments. The following table provides an overview of the available payment options.

<table>
<thead>
<tr>
<th>Types of Payment Options</th>
<th>Payment Options</th>
</tr>
</thead>
</table>
| Single payment options   | • You set the default payment amounts, as well as minimums and maximums.  
• You choose the accepted payment methods.  
• You determine whether a dollar amount can be passed from a campus web application to your uPay site.  
• You determine whether the customer can edit the dollar amount after it has been passed from a campus web application to your uPay site.  
• You determine if an encoded validation key is used with the parameters passed from a campus web application to your uPay site.  
• You determine if address verification is required for credit card purchases.  
• You determine whether the credit card verification value is required.  
• You determine whether the customer must enter their bank account number twice for ACH transactions.  
• You determine whether the customer must enter their address for ACH transactions.  
• You determine the URL that is targeted if the customer clicks the uPay cancel button. |
| Recurring payment options | • You determine whether recurring payments are allowed.  
• You determine if a maximum duration (time period) is set for completing recurring payments.  
• You determine the accepted frequencies (weekly, monthly, quarterly, etc.) for recurring payments. |
| Posting options          | • You determine whether a posting URL is used so that transaction parameters are passed to your campus web application.  
• You determine whether transaction parameters are passed to your campus web application when the customer clicks the uPay Cancel button. |
Types of Payment Options | Payment Options
---|---
**General ledger options** | • You determine whether to use Marketplace’s general ledger features for tracking revenue of your uPay site.  
• And once you turn on general ledger functionality, you choose an accounting code for the uPay site.

**Payment prompts** | • You determine the text that appears beside the payment amount prompt.  
• You determine the text that appears beside recurring payment prompt.

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uPay Site Images

For each uPay site, you can upload a header image, a side banner, and a footer image. At a minimum, you should upload a header image. Space is reserved in the header for the header image. The recommended size of the header image is 960 pixels wide by 145 pixels high.

The footer image and side banner are optional. The recommended size of the footer image is 960 pixels wide by 80 pixels high. The recommended size of the side banner is 250 pixels wide by 400 pixels high.

You can upload a header image and footer image.

The header image might include the name of your campus organization and school, as well as a logo or a photo. The footer image appears behind the TouchNet copyright information and the TouchNet logo.
The side banner appears to the left of the payment fields. If you upload a side banner, an area 250 pixels wide is reserved for this image.

Before you create a uPay site, you should create a header image and ensure it is ready for upload. Likewise, you should consider whether to use a footer image and a side banner, and (if you will use these optional images) you should ensure that these images are ready for upload.

**Note:** You can create a uPay site without first creating a header image (or a footer image or a side banner); however, you should not bring the uPay site ONLINE until you have finished the site configuration by uploading the applicable images.

For details about uploading images, see "uPay Site Images" on page 387.

**uPay Style Sheets**

The look and feel of a uPay site is largely determined by the site's style sheet. Marketplace provides a default style sheet, which can be downloaded via the Operations Center. You can then modify the style sheet and upload your modified style sheet. (For more about downloading and uploading style sheets, see "Style Sheet Modifications" on page 420.)

Style sheet modifications can be used to introduce campus branding strategies to uPay sites. By modifying the style sheet of a uPay site, you can change font families and sizes, you can add background colors, you can change button colors, you can change page justification, you can change the size of page elements, and much more.

Here is an example that shows how the look and feel of uPay site can be modified.
Here is a list of some of the possible style sheet modifications:

- **Site justification and width**—By default, uPay site layout is centered with a fixed width. However, you can modify the style sheet so that a uPay site is left justified. You can also modify the width of the layout.

- **Body background**—By default, a gray background image is used. This background image is applied to the BODY tag and therefore appears behind the entire page. You can remove this image and apply a background color of your choice. Or you can uPay site

- **Header size**—By default, the header size is 960 pixels wide by 150 pixels high. However, you can modify the size of the header by editing the style sheet. If you make modifications to the header size, you’ll need to take these modifications into consideration when you upload a header image.

- **Header background**—By default, the header image uses all of the space reserved for the header; however, the header size can be larger
than the header image, in which case the background of the header becomes visible. If you modify the style sheet, you can assign a background color or a background image to the header.

- **Main content background**—By default, a background image tiles in the main content background. This image includes a gray border on the far left and far right. The gray borders are important because they help demarcate the extent of the main content area. You can change the main background; however, any change to the main content background should take into consideration how the default image is used to set off the left and right borders.

- **Main content width and side banner width**—The side banner and main content area sit side by side, with the side banner area on the left and the main content area on the right. The side banner is approximately 250 pixels wide, although this width can be modified. If you change the width of the side banner, you can make a similar change (of opposite magnitude) to the main content width.

- **Font family and font size for main content**—The font family and font size (as well as the color) of text that appears in the main content area can be modified. You can assign different font family selections to the title text vs. the field label text. Several additional styles have been established for the various types of text that appear in uPay sites.

- **Button background**—By default, uPay site buttons are green with a gradient. If you would like to change the color (or background image) of the buttons or if you would like to change the button borders, you can modify the uPay style sheet. You can apply different backgrounds to different button states.

- **Font family and font size for buttons**—You can change the font family and font size of uPay buttons. If you change the font family or font size, you may find that you also need to modify the padding or margin.

- **Bottom navigation bar background**—By default, the bottom navigation bar is dark grey with a gradient. This background is applied via a background image. If you modify the style sheet, you can apply a different background color or image.

- **Bottom navigation bar size**—By default, the bottom navigation bar is 30 pixels high. If you make changes to the font size or family for the links in the bottom navigation bar (or to the padding), you may find that you need to modify the height of the bottom navigation bar.

- **Font family and font size for bottom navigation bar**—You can change the font family and font size of links in the bottom navigation bar. If you change the font family or font size, you may find that you also need to modify the padding or margin.

- **Footer background**—By default, the footer image uses all of the space reserved for the footer; however, the header size can be larger than the header image, in which case the background of the footer
becomes visible. If you modify the style sheet, you can assign a background color or a background image to the header.

- **Footer size**—By default, the footer size is 960 pixels wide by 120 pixels high (which includes the bottom navigation bar). However, you can modify the size of the footer by editing the style sheet. If you make modifications to the footer size, you'll need to take these modifications into consideration when/if you upload a footer image.

- **Borders**—Borders are applied to several of the page elements, such as the content area, the header, buttons, the bottom navigation bar, and the footer. You can modify the width and color of borders (or eliminate borders entirely).

To help you learn about the various page elements that comprise the uPay site layout, we strongly recommend that you use a tool such as Firebug with Firefox or Developer Tools with Internet Explorer. These tools allow you to quickly identify the ID names and class names of DIVs and other page elements.

**Messages and Titles**

Marketplace gives you the ability to customize selected text that appears on the uPay pages, such as the message text that appears at the top of each payment page and the title text that appears in the title bar of the customer's browser.

Each page of your uPay site has message text above the entry fields. This text appears in bold face. On most uPay pages, you can customize the contents of the message text. This text describes the purpose of the page and instructs customers how to use the page.

![A sample page with message above the entry fields.](image)

The following uPay pages have messages and titles that can be modified:

- The Payment Method Selection page
- The Credit Card page
Marketplace provides default message text and title text; however, you may discover that your uPay site has specific needs that must be addressed by modifying the default text. You should plan for these modifications and make the required edits before you bring your uPay site online.

For details on entering messages and titles, see "Messages and Titles" on page 380.

The following links appear in the bottom navigation bar of uPay sites:

- Privacy Policy
- Help
- Accessibility Policy
- Return Policy

These links are optional, except for Return Policy, which always appears.

Marketplace gives you the ability to modify the text used for each text link in the bottom navigation bar.

A sample privacy policy page.

The following table describes the functionality of the bottom navigation menu links:

<table>
<thead>
<tr>
<th>Functionality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Privacy Policy</td>
</tr>
<tr>
<td>Help</td>
</tr>
<tr>
<td>Accessibility Policy</td>
</tr>
<tr>
<td>Return Policy</td>
</tr>
</tbody>
</table>

When one of these links is clicked, a modal window appears that contains descriptive text. You can configure your uPay site by entering the descriptive text.

A sample bottom navigation menu with default link text.
### Button Links

You can customize the text that appears on most button links used by your uPay site. In addition, for each of these button links—except for the Continue button—you must enter a URL that will be targeted when the user clicks the corresponding button. Here are the button links you can customize:

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Continue</td>
<td>The Continue button appears throughout the uPay payment page. You can modify the text that appears on this button.</td>
</tr>
<tr>
<td>Success</td>
<td>After the customer has submitted their payment, the Receipt page appears. The success button is positioned near the bottom of this page. You can use this button to give customers a short message that they can click on to navigate away from the uPay site. In addition, you can specify the URL that is targeted by this link. For example, you might use this link to point the customer back to your campus web application.</td>
</tr>
<tr>
<td>Error</td>
<td>If a system failure is encountered, you can use the link on the error page to route the customer to an appropriate destination on the campus web application. You can also specify the text that appears on this button.</td>
</tr>
<tr>
<td>Cancel</td>
<td>If a customer clicks the uPay cancel button, you can use this link to route the customer to an appropriate destination on the campus web application. You can also specify the text that appears on this button.</td>
</tr>
</tbody>
</table>

Be sure to modify these button links before you bring your uPay site online.

For more information about button links, see "Miscellaneous: Links, URLs, and E-mail" on page 371.
Finally, after you have created a uPay site, you can add the ability for the uPay site to offer an additional donation option to the customer. This feature is a great way to introduce customers to a specific donation option. For example, while customers are making a payment for a parking pass or a dormitory rent deposit, you can provide these customers with the option of contributing to a library fund or an alumni fund. By providing increased exposure to these funds, you may increase the amount of revenue that these funds take in.

Once the Additional Donation feature is configured for a uPay site, all customers who visit this uPay site will see the additional donation option.

To configure a uPay site for the additional donation option, you need the following information:

- a name for the donation,
- the prompt text that customers will see (e.g., "How much would you like to contribute to the Library Fund?")
- a description of the donation (so they will better understand the nature of the cause),
- the payment fields to display to the customer (either set amounts that can be selected by choosing a radio button or an entry field that the customer can use to enter a specific amount), and ...
- (optional) an image to appear on the Additional Donation page.

For more information about the additional donation option, see "Additional Donations" on page 389.
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:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preparation</td>
<td>Prepare for building a uPay site by reviewing merchant settings, reviewing site customization options, and planning campus integration. (See &quot;Planning Ahead for uPay&quot; on page 346 and &quot;What uPay Customers See&quot; on page 337.)</td>
</tr>
<tr>
<td>Using Marketplace to build a uPay site</td>
<td>Build your uPay site by using the Add uPay Site option in Marketplace. This wizard leads you through the site setup options. (See &quot;Using Marketplace to Create a uPay Site&quot; on page 359.)</td>
</tr>
<tr>
<td>Linking to your uPay site</td>
<td>Set up your campus web application to pass transaction parameters to your uPay site. (See &quot;Passing Parameters to Your uPay Site&quot; on page 392.)</td>
</tr>
<tr>
<td>Using a VALIDATION_KEY</td>
<td>(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 &quot;Using the VALIDATION_KEY Option&quot; on page 404.)</td>
</tr>
<tr>
<td>Using a posting URL</td>
<td>Set up your campus web application to accept the transaction parameters that are passed from your uPay site back to your campus web application. (See Section 10.5, &quot;Using a Posting URL&quot; on page 410.)</td>
</tr>
<tr>
<td>Bringing your uPay site online</td>
<td>Use Marketplace to make your uPay site active and start receiving payments. (See &quot;Bringing Your uPay Site Online&quot; on page 416.)</td>
</tr>
</tbody>
</table>

10.1 Before You Build a uPay Site

Before you build a uPay site, you need to consider which merchant the uPay site will be linked to and how this merchant has been configured. You also need to become familiar with the wealth of customization options available in uPay so that you can make the appropriate selections during site setup. In addition, you will need to plan for integrating the uPay site.
with your campus web application by determining how uPay accepts transaction parameters and how it passes parameters back to your campus web application.

**Reviewing Merchant Settings**

uPay sites are connected to Marketplace merchants, so before you build a uPay site, a Marketplace merchant must exist that can be used for the uPay site. This merchant is affected by several configuration settings, and some of these settings affect uPay sites.

You can see the merchant configuration settings by using the Marketplace left navigation menu to navigate to Marketplace Home > [merchant name] > Settings.

Here are the key settings that you need to consider before setting up a uPay site:

- **Payment Gateway Host System Account**—Each Marketplace merchant uses a Payment Gateway host system account. This account contains payment information. It determines the acceptable credit cards, and it determines whether ACH payments can be accepted.

- **ACH Agreement Text**—The ACH agreement on the Merchant Settings page is used for all uPay sites created for this merchant. Customers must agree to this text before ACH payments are accepted.

- **Accounting Codes**—If you will be using general ledger functionality with your uPay site, you must also set up the applicable accounting codes. See Section, "Merchant Accounting Codes" on page 137.

**Planning uPay Customization**

Before you start using Marketplace to build your uPay site, you should first consider the various uPay payment settings, as well as the customizable page text and text links. You should consider the available page layout options and have prepared images that can be used for the header and (if necessary) banner, as well as the continue and cancel buttons. For a thorough discussion of the configurable options, go to "Planning Ahead for uPay" on page 346 and "What uPay Customers See" on page 337.

**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 392 and "Using a Posting URL" on page 410.
10.2 Using Marketplace to Create a uPay Site

To create a new uPay site, a merchant manager uses the following steps:

1. Navigate to Marketplace Home > [merchant name] > uPay Sites > Add uPay Site.

2. Complete information on each screen, clicking the Continue button to move between screens. The following subsections describe each page in the create-a-new-uPay-site process. These pages include:
   - Payment settings
   - Recurring payments
   - Miscellaneous settings
   - Messages and titles
   - User settings
   - Settings validation
   - Form parameters
   - Custom image upload

After you have completed these pages, a Marketplace site will have been created. However, the configuration may not be complete, as described in the following steps.

3. Download the uPay style sheet and make any necessary modifications. Then upload the style sheet.

4. Work with the administrator of the associated web application so that configuration is completed. This work may involve the passing of parameters from the web application to uPay (and accompanying configuration in uPay, if necessary). It may involve the use of a validation key with the input parameters. It may involve configuration for a posting URL.

5. After you have made all the necessary modifications to the uPay site, you can bring the site online.

Payment Settings

The second page in uPay setup is the Payment Settings page. Here, you enter options that govern what types of payments can be made and what payment data is required.
Field Definitions:

General Settings

Site ID
Display only. A uPay site ID is assigned when a uPay site is established. In order to launch a uPay site, a uPay site ID must be passed as a form parameter.
**T-Link Settings**

**Site uses T-Link**
If you are creating this uPay site to be used with a web application developed by a TouchNet Ready Partner, select Yes.

**T-Link Web Service URL**
If you selected Yes for "Site uses T-Link," you must enter the URL for the T-Link web service. In most cases, you will have already received this URL from the party that installed the web service. The web service is typically installed in the TouchNet DataCenter; however, if your campus has its own PCI-compliant DataCenter, this web service may have been installed on a campus server. You need to identify where the T-Link web service is installed and get the URL from the party that installed the web service. If you do not know where the web service is installed, you will need to contact your TouchNet support representative.

**Accounting Settings**

**Perform General Ledger Updates**
If you would like to use general ledger features to track revenue for your uPay site, you can turn on Marketplace’s general ledger ability by clicking Yes. Once you turn on general ledger functionality, the Accounting Code dropdown menu becomes available.

**Accounting Code**
Once you turn on general ledger functionality, you can select an accounting code from the Accounting Code dropdown. The codes available in the dropdown menu must have been previously established at the merchant level. For more information about accounting codes, see "Merchant Accounting Codes" on page 137.

**Note:** If your uPay site will be using a general ledger accounting code, you should set up the accounting code in Marketplace before beginning the process of adding a new uPay site. Go to "Merchant Accounting Codes" on page 137 and complete these instructions before you attempt to add a new uPay site.
Payment Settings

Require encoded validation key for amount?
This option allows uPay to validate the dollar amount that is passed to a uPay site. This validation is accomplished through the use of an encoded validation key (the VALIDATION_KEY input parameter), which can be passed by the campus web application once the "Require encoded validation key for amount?" option is set to Yes.

This option requires that the campus web application generates the encoded validation key value according to specific guidelines. See "Creating a VALIDATION_KEY" on page 407 for details on creating the validation key. This option is not available if you chose Yes for "Site uses T-Link."

Important! If the uPay site has been configured to accept a passed amount from the campus web application, TouchNet recommends that the VALIDATION_KEY parameter also be passed. The use of an encoded validation key helps to ensure the integrity of amounts that are passed to uPay.

When "Require encoded validation key for amount?" is set to Yes, the following actions also must be taken:

- You must enter a "Passed Amount Validation Key" value on the uPay Payment Settings page.
- You must select Yes for "Allow the amount to be passed in?" on the uPay Payment Settings page.
- The campus web application must pass a dollar amount as an input parameter. (For more information, see "uPay Parameter Details" on page 392.)
- 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 392.)
- 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 407)

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 404.

**Allow the amount to be passed in**
If you select Yes, the uPay site will accept a transaction amount passed by the campus web application. If the uPay site has been configured with a Default Payment Amount, the amount that is passed by the campus web application will override the default amount.

*Important!* If you turn this option on, TouchNet recommends you also use the encoded validation key described below. For more information, see "Using the VALIDATION_KEY Option" on page 404.

**Note:** For more details about passing data to uPay, see "Form Parameters" on page 385.

**Allow the user to edit the payment amount**
If you select Yes, the user can change either your default payment amount or the amount that has been passed from your application.

**Payment Amount Prompt**
When a customer views your uPay site, this prompt appears beside the field that shows the dollar amount that the customer agrees to pay. For example, if the uPay site will be used in conjunction with a web application that sells parking passes, the prompt might say "Total fee"; however, if the uPay site will be used in conjunction with a web application that accepts alumni donations, the prompt might say "Donation amount."

**Default Payment Amount**
If the campus web application does not pass a payment amount to uPay, the Default Payment Amount value will be displayed to customers as the payment amount. If the payment amount is not passed to uPay, you can leave the default payment amount empty; however, in this situation, you must be sure to say Yes to the "Allow the user to edit the payment amount" option.

If you select No for "Allow the user to edit the payment amount," you must enter an amount in the "Default Payment Amount" field.

**Note:** For more information about passing a payment amount to uPay, see "Allow the amount to be passed in," described below.
Minimum and Maximum Payment Amounts

You can 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.

Validation Settings

Require address verification for credit card payment
If you select Yes, the customer will be required to provide the cardholder’s street address, city, state, and ZIP code.

Note: Depending on how Payment Gateway has been configured, requiring data may result in the failure of transactions with incorrect data.

Require the credit card security code?
If you select Yes, the user must enter this value. The credit card security code is the number printed on the credit card, usually above the signature area or above the imprinted number.

Note: Depending on how Payment Gateway has been configured, requiring data may result in the failure of transactions with incorrect data.

Require address for ACH Payment
If you select Yes, the user will be required to provide a street address, city, state, and ZIP code.

Require bank account number to be entered twice?
If you select Yes, the user must enter the bank account number twice. This helps prevent accounting errors due to mis-typed but valid numbers.

ACH Shared Secret Prompt
A shared secret value is a value that the user knows (for example, a birth year or the last four digits of an ID number). While the shared secret value is not required by uPay, it is a requirement of the NACHA rules for web-based ACH payments. Having users enter a shared secret value increases security of payments through electronic bank accounts.

The shared secret prompt you enter appears before the shared secret value field.
To use the shared secret value, you must pass it to uPay from your application. You can also pass a shared secret value prompt, which will override your Operations Center entry. See "Form Parameters" on page 385.

**Note:** To use the shared secret value, you must pass it to uPay from your web application. You can also pass a shared secret value prompt, which will override your Operations Center entry. See "Form Parameters" on page 385. If your web application does not pass the shared secret value, then the uPay ACH Agreement page will not ask the customer to enter anything on the page. The customer will only need to click the Continue button. In either case, uPay treats clicking Continue as an agreement to the terms.

**Require address for campus card?**
If you select Yes, customers using a campus card for payment will be asked to enter the address of the cardholder.

**Require pin number for campus card?**
If you select Yes, customers using a campus card for payment will be asked to enter their pin number. This field works much like the credit card security code field.

### Optional Prompts

<table>
<thead>
<tr>
<th>Prompt</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show email address prompt</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Require email address</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Show day phone prompt</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Show night phone prompt</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Show mobile phone prompt</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Transaction ID Settings

<table>
<thead>
<tr>
<th>Setting</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show External Transaction Id in email</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Show External Transaction Id in URL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Validate External Transaction Id is unique to this uPay Site</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Allow reuse of Cancelled External Transaction Id</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

### Accepted Payment Methods

- MC
- Discover
- AmEx
- Visa
- VisaCheck
- MasterCard

**Optional Prompts**

**Show email address prompt?**
If you select Yes, the user will be prompted to enter an e-mail address. This e-mail address will be used for sending the user an e-mail confirmation.
message at the conclusion of the payment process. This e-mail address will also be used when recurring payments take place. In addition, if any payments must be refunded, an e-mail message will be sent to this e-mail address. If the uPay site will be used in conjunction with a campus web application but the web application does not have the ability to send out confirmation e-mail messages, you can turn on uPay’s e-mail functionality by selecting Yes for Show Email Address Prompt?

If your campus web application is capable of passing the user's e-mail address, uPay can receive this value as a form parameter when the campus web application launches the uPay site and pre-populate uPay’s e-mail address field with the user's e-mail address. For more information on passing parameters to uPay, see "Form Parameters" on page 385.

**Require email Address?**
If you select Yes, the user must enter an e-mail address in the Show Email Address Prompt field. This field is not available if No was selected for Show Email Address Prompt?

*Note:* The e-mail address fields on the uPay Payment Settings page are designed to provide uPay sites with the ability to generate e-mail confirmation messages to users upon the conclusion of the payment process. Do not use these fields unless you intend for uPay to generate e-mail confirmation messages.

**Show day/night/mobile phone prompt?**
If you select Yes, customers will see a prompt for the corresponding telephone number.

### Transaction ID Settings

**Show External Transaction ID in E-Mail?**
If you select Yes, customers will see the external transaction ID in success e-mail messages.

**Show External Transaction ID in URL?**
If you select Yes, the customers will see the external transaction ID as part of the URL for the cancel button, the success link, and the error link.

**Validate External Transaction ID is unique to this uPay site?**
If you select Yes, uPay will require that an external transaction ID is passed by the campus web application. This external transaction ID must be unique. uPay will validate that the submitted external transaction ID has not previously been used by this uPay site (however, this external transaction ID CAN be used by other uPay sites). If the value is not passed, or if the value is not unique, the customer will receive an error message.
Allow reuse of Cancelled External Transaction ID?
If "Validate External Transaction ID is unique to this uPay site" is set to Yes, Marketplace uPay will require that a unique external transaction ID be passed to the site. Resultingly, after a transaction has been cancelled, some schools may wish to reuse the corresponding external transaction ID. Select Yes for "Allow reuse of Cancelled External Transaction ID?" in order to reuse external transaction IDs for cancelled transactions.

Accepted Payment Methods
This list of available payment methods comes from Payment Gateway’s commerce configuration. It shows all the payment methods allowed for your host system account.

If you include the electronic banking (ACH) option, both savings and checking accounts will be allowed.

Campus cards and Interac can be used as payment methods for uPay sites; however, campus cards and Interac are not available with T-Link.

Notes on Payment Methods
Marketplace uPay accepts credit cards, campus cards, Interac Online, and electronic check (ACH). The payment methods that are available for a uPay site depend on the configuration of the Payment Gateway host system account that is used by the corresponding Marketplace merchant.

<table>
<thead>
<tr>
<th>Credit Card Name</th>
<th>Name Displayed to Buyers</th>
</tr>
</thead>
<tbody>
<tr>
<td>MasterCard</td>
<td>MasterCard</td>
</tr>
<tr>
<td>Visa</td>
<td>Visa</td>
</tr>
<tr>
<td>American Express</td>
<td>AmEx</td>
</tr>
<tr>
<td>Discover Card</td>
<td>Discover</td>
</tr>
<tr>
<td>JCB</td>
<td>JCB</td>
</tr>
<tr>
<td>Diners Club International</td>
<td>DinersClub</td>
</tr>
<tr>
<td>Carte Blanche</td>
<td>CarteBlanche</td>
</tr>
<tr>
<td>China UnionPay</td>
<td>ChinaUnionPay</td>
</tr>
<tr>
<td>DinaCard</td>
<td>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.</td>
</tr>
<tr>
<td>BC Card</td>
<td>BC Card</td>
</tr>
</tbody>
</table>
The credit card names displayed to customers are predefined in Payment Gateway and are not editable.

uPay site managers determine which payment methods to use. For example, a host system account might be configured for MasterCard, Visa, American Express, and ACH, but a uPay site might be configured to only use MasterCard and ACH (a subset of the available payment methods).

Marketplace displays icons for each available payment method on the Credit Card Information page. If Discover is selected as an accepted payment method for a uPay site, customers will also see icons for Diners Card and BC Card, according to Discover Network requirements.

**Important!** The Discover Network requires that all merchants that accept the Discover Card must also accept Diners Club, JCB, Carte Blanche, and China UnionPay. For details, please check your agreement with the Discover Network. When you set up the allowed payment methods for a uPay site, you should keep this requirement in mind.

### Campus cards accepted by Marketplace:

<table>
<thead>
<tr>
<th>Campus Card Name</th>
<th>Name Displayed to Buyers</th>
</tr>
</thead>
<tbody>
<tr>
<td>CBORD</td>
<td>Configurable in Payment Gateway</td>
</tr>
<tr>
<td>Blackboard</td>
<td></td>
</tr>
</tbody>
</table>

When these campus cards are configured in Payment Gateway, the name that will be displayed to customers can be configured. For example, if the school wants to use the name "State University Card," then this name can be entered on the Payment Methods page in Payment Gateway.

Interac Online is also available as a payment method for uPay sites. Interac Online can only be used by Marketplace merchants that use Canadian banks. Customers will see this payment method listed as "Online Payment via INTERAC." Buyers will also see the Interac Online icon, a trademark statement, and a link named "Learn More" that links to [www.interaconline.com](http://www.interaconline.com).

Electronic check (ACH) appears as "webCheck" in the Marketplace Operations Center; however, this payment method appears as "Electronic Check (ACH)" to uPay customers.

**Recurring Payments**

The third uPay setup screen is the Recurring Payments screen. Here, you configure the options that allow customers to set up scheduled recurring payments.
To enable recurring payments for a uPay site, be sure to select Yes for "Allow Recurring Payments" (the first option on the Recurring Payments page) and complete the additional setup fields.

The Campus web application can pass parameters that establish the configuration values for scheduled recurring payments. These parameters allow for the following information to be sent:

- frequency
- start date
- end date
- total number of payments
- and a parameter that determines what uPay will do if the customer's credit card expiration date comes before the last scheduled recurring payment

In addition, the TouchNet Ready Partner's web application can pass a parameter that determines if the customer can make modifications to the values that are passed (such as the frequency, the start date, and the end date).
Field Definitions:

Allow Recurring Payments
If you set this option to yes, complete the rest of the options for the page. If you set the option to no, skip the rest of the options on this page.

Prompt Displayed to User Asking if Recurring Payments are Desired
This prompt asks the user whether they want to make a recurring payment. The prompt appears on the first page of your uPay site along with a yes or no selection for the user.

Maximum Duration
Enter a number and specify whether it is a number of months or years. The most you can allow is 6 years. If you leave the number field empty, the maximum duration will be 6 years.

Accepted Frequencies
When making a recurring payment, the user is asked, "How often will your payment recur?" The options you check here will appear in this dropdown selection list for the user.

ACH Agreement Text for Recurring Payments
Your ACH agreement performs two functions. It is your statement of terms and conditions for electronic payments. It is also your stored evidence of payment and the identity of the payer.

The text you enter on this page appears only for recurring payments. (Text for single payments is entered by a Marketplace administrator.) This allows you to modify your wording if needed so that the user agrees to the upcoming payments, not just a single payment.

Contact Information for Users Who Create Recurring Payments
This information is printed on the user’s receipt. Enter information for the person who can refund payments or cancel an upcoming, scheduled payment.

Note: This information is important for users because it provides them with a contact if they want to change or cancel recurring payments. uPay does not provide self-service options where users can change or cancel their own recurring payments.
The next uPay setup screen is the Misc Settings screen, where you enter information about navigation out of a uPay site, contact e-mail information, and the URL used for posting collected data.

### Miscellaneous
**Links, URLs, and E-mail**

**Donations Miscellaneous Settings**

**General Settings**

<table>
<thead>
<tr>
<th>Site ID</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Site Status</td>
<td>ONLINE</td>
</tr>
<tr>
<td>Site Name</td>
<td>Donabre</td>
</tr>
<tr>
<td>Site Contact Email Address</td>
<td><a href="mailto:tmr52@touchnet.com">tmr52@touchnet.com</a></td>
</tr>
</tbody>
</table>

**Posting Settings**

To have payment results and other useful data posted to your application, use the Posting URL. This URL is not used to navigate the user’s browser. It is used only to update your application.

- **Post data to show when users click Cancel:**
  - [ ] Yes
  - [x] No

- **Make uPay User wait for post to complete:**
  - [ ] Yes
  - [x] No

- **Number of seconds for uPay User to wait before making posting as failed:**
  - 10

- **Posting URL:**
  - 

- **Additional posting value can be passed as an identifier for post-back validation:**
  - 

**Email Settings**

- **Send Payment Notification Email:**
  - [ ] Yes
  - [x] No

- **Notification Confirmation Announcement:**
  - (5000 chars max)

- **Email Refund Announcement:**
  - (5000 chars max)

- **Email Cancel Announcement:**
  - (5000 chars max)
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: ONLINE and OFFLINE. When a uPay site is first created, the site has a status of OFFLINE. In order for customers to start using the uPay site, you must change the status to ONLINE.

**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 Manager’s E-mail Address**
The Site Manager receives e-mail confirmations related to site setup. In addition, e-mail messages for posting URL failures or GL update failures are sent to this e-mail address.

**Posting Settings**

**Post data to show when users click Cancel**
If you want the posted data to include records of all cancelled transactions as well as successful transactions, select Yes. Whenever a user clicks the Cancel button to stop a transaction, the transaction details will be posted. This field does not appear if you selected Yes for "Site uses T-Link" on the uPay Payment Settings page.

**Make uPay User wait for post to complete?**
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.
Number of seconds for uPay user to wait before marking posting as failed
This field represents the maximum number of seconds that uPay will wait for the campus web application to respond to posting data. If the campus web application has not responded after this period of time, uPay will continue to the receipt page. If the maximum wait period is reached, the posting will be marked as failed in Marketplace.

Posting URL
After a transaction is processed (or recurring payments are established), uPay can pass parameters describing the transaction back to a campus web application. These parameters can be passed by uPay with the use of a "Posting URL." If you would like for the output parameters to be passed to a campus web application, you must enter the URL for that destination in the "Posting URL" field. For more information, see "Using a Posting URL" on page 410.

Note: TouchNet strongly recommends use of https with the Posting URL.

Additional Posting Value
The "Additional Posting Value" is a value that can be optionally passed by uPay to the posting URL. Some schools use this field to pass a value that identifies the uPay site and can be verified with the web application that utilizes the posting URL. As a result, this value can be used to help ensure the integrity of the transaction information that is being passed to the posting URL.

Note: The parameter sent to the posting URL is named posting_key.

Important! The "Additional Posting Value" should not be considered an alternative to using the VALIDATION_KEY option. The "Additional Posting Value" uses a static value that is NOT encoded—and it's used AFTER uPay has processed the transaction. However, the VALIDATION_KEY option uses a dynamic value that IS encoded—and it’s used when the transaction amount is initially passed to uPay—therefore, providing a much higher level of transaction integrity. If you would like to use an "Additional Posting Value," we strongly recommend you use this value in conjunction with the VALIDATION_KEY option and NOT as an alternative to the VALIDATION_KEY option. For more about the VALIDATION_KEY option, see "Using the VALIDATION_KEY Option" on page 404.
Email Settings

Send Payment Notification Email
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 would be irrelevant.

Notification Confirmation Announcement
The text entered in this field will appear on e-mail confirmation messages. This announcement will appear after the payment details section. It will appear on confirmation messages generated for single payments as well as recurring payments.

Email Refund Announcement
The text entered in this field will appear on e-mail refund messages.

Email Cancel Announcement
The text entered in this field will appear on e-mail cancellation messages.
### Return Policy Settings

**Enable Return Policy**

By default, the Return Policy Agreement for your uPay site will be displayed to customers on the Verify Your Payment Information page. However, if display of the Return Policy Agreement is not appropriate for your uPay site, you can turn off the display of the Return Policy Agreement by selecting No for the Enable Return Policy option.
The Return Policy Agreement appears on the Verify Your Payment Information page of uPay. For uStores, you can turn off the display of the Return Policy Agreement.

The display of a return policy is typically required by credit card regulations. However, if your uPay site does not accept credit cards, or if the credit cards that you accept do not require the display of a return policy, then you may consider disabling the display of a Return Policy Agreement.

**Important!** Before you choose No for the Enable Return Policy option, we strongly recommend that you contact your credit card processor about credit card regulations and determine whether display of the return policy is required.

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

Here is an example of the Return Policy section that will appear to customers on the Verify Your Payment Information page.
Return Policy
TouchNet strongly recommends that each uPay site develop a return policy.

A link to the Return Policy page appears in the bottom navigation menu for uPay pages. When customers select the Return Policy link, a modal window is displayed that provides information about the uPay site’s return policy. This text can be configured by using the Return Policy field. This same text also appears on the Verify Your Payment Information page of the checkout process.

This field accepts HTML. We recommend the use of <h2> tags for header text and <p> tags for body text. However, with the use of style sheet changes you can further modify the layout of return policy text.

Keep in mind that the HTML you enter in this field will appear on two different pages: 1) the Return Policy modal window and 2) the Return Policy Agreement section of the Verify Your Payment Information page. Therefore, any style sheet modifications will need to work for both pages.

Success Link Settings

Text For Success Link
The Success Link text appears as a button on the receipt page. This button text is hyperlinked with the URL that you provide in the "Success Link URL" field. The Success Link field does not appear if you selected Yes for "Site uses T-Link" on the uPay Payment Settings page. By default, this field originally contains the following text: "Thank you for your payment. Click here to continue."; however, you are in control of this value and can modify the button text.

Success Link URL
If you chose No for "Site uses T-Link" on the uPay Payment Settings page, this field indicates where the customer will be directed when they select the Success Link button on the uPay receipt page. To determine the value for this field, you should contact the administrator of the campus web application that is using uPay. This field must contain a URL that points at a location in the campus web application (or at another logical destination for the customer). This field does not appear if you selected Yes for "Site uses T-Link" on the uPay Payment Settings page.

Customers are not required to click the Success Link button. The payment process has been completed by the time the Success Link button appears on the uPay receipt page. Therefore, the campus web application should not depend upon customers clicking the Success Link button. To pass payment parameters to the campus web application at the conclusion of the payment process, you should use a Posting URL (not the Success Link URL), as described in "Using a Posting URL" on page 410.
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.

Error Link Settings

Text for Error Link
If a Marketplace/uPay system failure takes place, this text will appear on the error page. You can modify the text that appears on this page by changing the value in this field. By default, this field originally contains the following text: "We're sorry. An error has occurred. Please try again later." However, you are in control of this value and can modify the text.

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

Text for Cancel Link
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

Text For Continue Link
A "Continue" button appears throughout the uPay payment pages. Customers will select this button to record their entries on each page. You can modify the text that appears on this button by changing the value in this field. By default, this field originally contains the word "Continue"; however, you are in control of this value and can modify the button text.

Enable [Privacy/Help/Accessibility] Link
Use of the Privacy, Help, and Accessibility links is optional. These links will appear in the bottom navigation bar of the uPay site. If you want to use one of these links, click the Yes radio button to enable the link. Separate configuration settings are available for the Privacy, Help, and Accessibility links.

Text for [Privacy/Help/Accessibility Link] Link
The text for the Privacy, Help, and Accessibility links can be customized to meet the meetings of the uPay site. The alternate text that you enter in these fields will appear in the bottom navigation menu of the uPay site. If you make no entry in these fields, Marketplace will use the following default link text: "Privacy Policy," "Help," and "Accessibility."
[Privacy/Help/Accessibility Link] URL
When the customer clicks on the Privacy, Help, Accessibility links in the bottom navigation bar of the uPay site, you can either send the customer to a web page that you manage outside of the Marketplace Operations Center (in which case you use the Privacy/Help/Accessibility Link URL field to point at this page) or open a modal window with content that is managed in Marketplace (in which case you use the Privacy/Help/Accessibility Text field to configure the window text). If you use a Link URL, a web page will need to be maintained on the destination server.

[Privacy/Help/Accessibility] Text
You can use Marketplace to manage the text that appears when the customer clicks on the Privacy, Help, and Accessibility links in the bottom navigation bar of your uPay site. This text will appear in a modal window.

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

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

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

**Note:** If you make entries in both the Privacy/Help/Accessibility Link URL field AND the Privacy/Help/Accessibility Text field, only the Link URL value will be used.

Messages and Titles
The next uPay setup screen is the Messages and Titles screen. Here, you customize the page names that appear in the user’s browser title bar and the messages that the user sees at the top of uPay pages.
Entering text in the Payment Method Selection fields updates this uPay page.
Entering text in the Credit Card fields has the following effects.

If the customer selected Credit Card as the payment method, the next uPay payment page displays the Credit Card Payment Info Message above the credit card info fields.

After the customer enters their credit card info, the uPay site displays the Credit Card Payment Verification message above the info to be verified.
Entering text in the Electronic Banking fields has the following effects.

- If the customer selected Electronic Check (ACH) as the payment method, uPay displays the ACH Payment Info message above bank account info fields.
- After the customer enters bank account info, uPay displays the ACH Agreement Page Header message above the payment information and the ACH agreement.
The text you enter in the Receipt Page fields affects what the customer sees at the end of the payment process.
Select a site Manager from the list of U.Commerce users. All U.Commerce users are listed in the Marketplace User dropdown list. You can select yourself as the Site Manager or you can set up another U.Commerce user as the uPay site manager.

**Verify Site Info**

The last page in uPay setup allows you to verify your site information. Review all the information displayed on this page. If you want to change information, click the corresponding edit button.

When you are satisfied with your setup, click the Create uPay Site button.

**Form Parameters**

Next, uPay displays your site’s form parameters. These include optional and required parameters. Your campus web application passes these parameters to uPay when the customer clicks to make a payment.
Your uPay site can take actions based on the values you pass for these parameters. Your uPay site can accept additional parameters besides the

### uPay Site Creation Successful

Your uPay site is now ready to be used. To upload custom graphics for this site, use the button below.

Your uPay site has been created successfully.

Below are the parameters that can be passed to the uPay application and will be understood by the application.

For security purposes, you must pass the parameters using the post method.

<table>
<thead>
<tr>
<th>Required Parameters</th>
<th>Optional Parameters</th>
</tr>
</thead>
<tbody>
<tr>
<td>UPAY_SITE_ID=6</td>
<td>Used to access the uPay site.</td>
</tr>
<tr>
<td>BILL_EMAIL_ADDRESS</td>
<td>Used to pass the billing email address.</td>
</tr>
<tr>
<td>BILL_STREET1</td>
<td>Used to pass the billing street address 1.</td>
</tr>
<tr>
<td>BILL_STREET2</td>
<td>Used to pass the billing street address 2.</td>
</tr>
<tr>
<td>BILL_CITY</td>
<td>Used to pass the billing city.</td>
</tr>
<tr>
<td>BILL_STATE</td>
<td>Used to pass the billing state.</td>
</tr>
<tr>
<td>BILL_POSTAL_CODE</td>
<td>Used to pass the billing postal code.</td>
</tr>
<tr>
<td>BILL_COUNTRY</td>
<td>Used to pass the billing country.</td>
</tr>
<tr>
<td>EXT_TRANS_ID</td>
<td>Used as a cross reference between the external site and a uPay site.</td>
</tr>
<tr>
<td>EXT_TRANS_ID_LABEL</td>
<td>Used to describe the EXT_TRANS_ID value on the payment receipt.</td>
</tr>
<tr>
<td>AMT</td>
<td>Used to pass the amount to be paid.</td>
</tr>
<tr>
<td>SSV</td>
<td>Used to pass the shared secret for ACH payments.</td>
</tr>
<tr>
<td>SSV_PROMPT</td>
<td>Used to generate the prompt for entering their shared secret.</td>
</tr>
<tr>
<td>VALIDATION_KEY</td>
<td>Used to assure that the amount being passed in has not been altered prior to form submission.</td>
</tr>
<tr>
<td>RECURRING_USER_CAN_CHANGE</td>
<td>End user can change the schedule from what is passed. (true or false)</td>
</tr>
<tr>
<td>RECURRING_CAN_CHANGE_END_DATE_TO_CC_END_DATE</td>
<td>Schedule can change end date to match credit card expiration date if expiration date is before end date. (true or false)</td>
</tr>
<tr>
<td>RECURRING_START_DATE</td>
<td>Date recurring payments start. M/d/yyyy</td>
</tr>
<tr>
<td>RECURRING_END_DATE</td>
<td>Date recurring payments end. M/d/yyyy</td>
</tr>
<tr>
<td>RECURRING_FREQUENCY</td>
<td>Frequency for recurring payments. Must be value, not name.</td>
</tr>
</tbody>
</table>

Passed Value | Frequency |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>Weekly</td>
</tr>
<tr>
<td>1</td>
<td>Monthly</td>
</tr>
<tr>
<td>2</td>
<td>BIMonthly</td>
</tr>
<tr>
<td>5</td>
<td>Quarterly</td>
</tr>
<tr>
<td>6</td>
<td>Semi-Annually</td>
</tr>
<tr>
<td>7</td>
<td>Annually</td>
</tr>
<tr>
<td>RECURRING_NUMBER_OF_PAYMENTS</td>
<td>Number of payments instead of end date.</td>
</tr>
<tr>
<td>SUCCESS_LINK</td>
<td>Used to pass a new url for the success link.</td>
</tr>
<tr>
<td>SUCCESS_LINK_TEXT</td>
<td>Used to pass the text for the success link.</td>
</tr>
<tr>
<td>ERROR_LINK</td>
<td>Used to pass a new url for the error link.</td>
</tr>
<tr>
<td>ERROR_LINK_TEXT</td>
<td>Used to pass the text for the error link.</td>
</tr>
<tr>
<td>CANCEL_LINK</td>
<td>Used to pass a new url for the cancel button.</td>
</tr>
<tr>
<td>CANCEL_LINK_TEXT</td>
<td>Used to pass the text for the success button.</td>
</tr>
<tr>
<td>CREDIT_ACCT_CODE</td>
<td>Used to pass credit accounting code to override the uPay default accounting code.</td>
</tr>
<tr>
<td>DEBIT_ACCT_CODE</td>
<td>Used to pass debit accounting code to override the Payment accounting code.</td>
</tr>
</tbody>
</table>

You may now take this opportunity to upload custom images for your newly created uPay Site.

**Upload Custom Images**
ones listed; however, it will take no actions based on the additional parameters other than to pass these parameters back to the posting URL after the transaction has been processed.

You should take note of the form parameters so you will know the range of information that can be passed to your uPay site and can utilize the parameters as necessary to fulfill the needs of your campus web application.

For details on the form parameters, see "Passing Parameters to Your uPay Site" on page 392.

When you finish using the Form Parameters page, you can click the Upload Custom Images button to work with images for your site.

**Note:** You can return to the Form Parameters page at any time by using the uPay site’s Form Parameters link in the left navigation menu.

### uPay Site Images

The Image Settings page appears if you clicked the Upload Custom Images button on the Form Parameters page (when creating a new uPay site). This page also appears when you navigate to the uPay site’s Image Settings page via the left navigation menu:

Marketplace Home > [Merchant Name] > uPay Sites > [uPay Site Name] > Image Settings
You can upload the following images for each uPay site:

- **Header Image**—This image appears in the header area of your uPay site pages. By default, an area 960 pixels wide by 145 pixels high is reserved on the uPay payment pages for the header image. You should always upload a header image for your uPay site.

- **Side Banner**—(Optional) This image is optional. It appears to the left of the uPay fields. If you upload a side banner, the uPay fields move to the right and an area 250 pixels wide by 400 pixels high is created for the side banner.

- **Footer Image**—(Optional) This image is optional. It appears in the footer area of your uPay site pages. By default, an area 960 pixels wide by 80 pixels high is reserved on the uPay payment pages for the footer image. The TouchNet copyright and logo appear on top of the footer image, which is used in the background.

For examples of how these images appear on uPay pages, see "uPay Site Images" on page 348.
Graphics Specifications

Use graphics in JPG, GIF, or PNG format. The maximum graphics file size is 250K.

We recommend that you upload images at the recommended (default) sizes. If you upload images at different pixel dimensions, you may need to edit the style sheet for your uPay site in order to adjust the page layout accordingly.

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

Additional Donations

The Additional Donation page does not appear as part of the uPay site creation process. However, once a uPay site has been created, you can use this page to configure a uPay site for offering an additional donation option to customers.

To view the Additional Donation page, use the left navigation menu:

Marketplace Home > [Merchant Name] > uPay Sites > [uPay Site Name] > Additional Donation
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.
Prompt displayed to user to request a one-time donation

#3 in the above screenshot
This prompt message appears immediately after the donation description and above the donation amount field(s). You should word this message in terms of "How much would you like to donate?" because the donation amount fields follow this prompt.

Description

#2 in the above screenshot
The description field can be used to provide customers with information about the additional donation option. Customers can read this field and then make a good decision regarding whether to opt for the additional donation. This field accepts up to 30,000 characters and it accepts HTML.

Note: Please keep in mind the main reason your customers arrive at the uPay site is to make a payment, so long blocks of text or HTML in the description field may serve as a deterrent to customers completing the transaction. We recommend you make your descriptions concise.

Donation amount

#4 in the above screenshot
This section allows you to determine the donation amount fields that will be presented to customers.

If you choose the "User entered amount" checkbox, the customer will see an entry box that they can use for entering a specific donation amount.

If you choose the #1 checkbox, you can enter a specific donation amount that will appear as an option for customers (as a radio button selection). You can add additional donation amounts by selecting the Add More Selections button.
button. In addition to these specific donation amount options, customers will also see an option for "No, Thank You" (as a radio button selection).

**Image Management for Additional Donation**

You can use the "Upload full size image" button to upload an image that will appear for customers when they view the Additional Donation page on the uPay site.

### 10.3 Passing Parameters to Your uPay Site

For uPay to integrate with a campus web application, the campus web application must be able to pass parameters that describe the transaction. At a minimum, the campus web application must pass a uPay site ID that identifies which uPay site will handle the transaction. In addition, in order for a transaction to be identified and tracked, the campus web application must pass a transaction ID (called EXT_TRANS_ID by uPay).

Some parameters can be used to automatically populate fields on your uPay site. For example, the customer’s billing address can be passed to uPay so that the customer isn’t required to re-enter this information. Likewise, a dollar amount can be passed directly to uPay.

You do not need to tell Marketplace which parameters you will be passing. You only need pass the parameters when directing a customer to your uPay site. uPay will accept any parameters that you pass and in turn pass the parameters back to your campus web application after the transaction is processed (provided you use the posting URL option, as described in "Using a Posting URL" on page 410).

#### 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 410. 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:

<table>
<thead>
<tr>
<th>Parameters</th>
<th>Description</th>
<th>Field Length</th>
<th>Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>UPAY_SITE_ID</td>
<td>Required. This is a numerical value unique to each uPay site. The value is displayed in the Form Parameters page for the uPay site.</td>
<td>unlimited</td>
<td>numeric</td>
</tr>
<tr>
<td>BILL_NAME</td>
<td>Used to pass the billing name.</td>
<td>50</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>BILL_EMAIL_ADDRESS</td>
<td>Used to pass the billing e-mail address.</td>
<td>50</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>BILL_STREET1</td>
<td>Used to pass the billing street address 1.</td>
<td>35</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>BILL_STREET2</td>
<td>Used to pass the billing street address 2.</td>
<td>35</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>BILL_CITY</td>
<td>Used to pass the billing city.</td>
<td>35</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>BILL_STATE</td>
<td>Used to pass the billing state. The billing state should be passed as the two-character state abbreviation. For foreign addresses, &quot;--&quot; can be passed to uPay in order to select &quot;Not applicable&quot; for the state field.</td>
<td>2</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>BILL_POSTAL_CODE</td>
<td>Used to pass the billing postal code. To accommodate foreign addresses, uPay will accept up to 30 characters in the postal code parameter.</td>
<td>30</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>BILL_COUNTRY</td>
<td>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 <a href="http://www.iso.org/iso/country_codes.htm">www.iso.org/iso/country_codes.htm</a>.</td>
<td>2</td>
<td>alphabetic</td>
</tr>
<tr>
<td>Parameters</td>
<td>Description</td>
<td>Field Length</td>
<td>Data Type</td>
</tr>
<tr>
<td>--------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------</td>
<td>------------</td>
</tr>
</tbody>
</table>
| 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 |
<p>| 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 |</p>
<table>
<thead>
<tr>
<th>Parameters</th>
<th>Description</th>
<th>Field Length</th>
<th>Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>AMT</td>
<td>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 &quot;Allow the amount to be passed in&quot; on the uPay Payment Settings page. If the campus web application passes the VALIDATION_KEY parameter (and Yes for &quot;Require encoded validation key for amount?&quot; 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 &quot;Payment Settings&quot; on page 359. Maximum value: 99999.99.</td>
<td>8 (including 2 characters to the right of the decimal point)</td>
<td>numeric</td>
</tr>
<tr>
<td>SSV</td>
<td>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.</td>
<td>unlimited</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>Parameters</td>
<td>Description</td>
<td>Field Length</td>
<td>Data Type</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------</td>
<td>---------------</td>
</tr>
<tr>
<td>SSV_PROMPT</td>
<td>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.</td>
<td>unlimited</td>
<td>alphanumeric</td>
</tr>
</tbody>
</table>
| 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 404. | unlimited    | alphanumeric  |
<table>
<thead>
<tr>
<th>Parameters</th>
<th>Description</th>
<th>Field Length</th>
<th>Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>RECURRING_USER_CAN_CHANGE</td>
<td>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. <strong>Note:</strong> 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.</td>
<td>unlimited</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>Parameters</td>
<td>Description</td>
<td>Field Length</td>
<td>Data Type</td>
</tr>
<tr>
<td>------------</td>
<td>-------------</td>
<td>--------------</td>
<td>-----------</td>
</tr>
<tr>
<td>RECURRING_CAN_CHANGE_END_DATE_TO_CC_EXP_DATE</td>
<td>If recurring payment parameters are being sent to the uPay site, this parameter determines what happens if the customer enters a credit card expiration date that will occur before the projected end date of the recurring payments. Accepted values: Yes or No. If RECURRING_EXP_DATE_CHANGE = Yes and the customer enters a credit card expiration date that will occur before the projected end date of the recurring payments, uPay will automatically change the end date of the recurring payments so it comes before the credit card expiration date. If RECURRING_EXP_DATE_CHANGE = No and the customer enters a credit card expiration date that will occur before the projected end date of the recurring payments, uPay will prompt the customer to use a different credit card. <strong>Example:</strong> The customer uses the campus web application to make a monthly donation of $100. In the campus web application, the customer enters the following information when establishing recurring payments: start date - 10/26/2008, frequency - monthly, and end date - 06/26/10. This information is passed to uPay by the campus web application, at which point the customer enters their credit card information. The customer enters a credit card expiration date of 04/10—which predates the end date of the recurring payments. Because the campus web application sent RECURRING_EXP_DATE_CHANGE = Yes, uPay automatically changes the date of the last payment to 4/26/10. The monthly donation remains unchanged at $100. <strong>Note:</strong> 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</td>
<td>unlimited</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>Parameters</td>
<td>Description</td>
<td>Field Length</td>
<td>Data Type</td>
</tr>
<tr>
<td>----------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------</td>
<td>---------------</td>
</tr>
<tr>
<td>RECURRING_START_DATE</td>
<td>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.</td>
<td>10</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>RECURRING_END_DATE</td>
<td>If the uPay site accepts recurring payments, this parameter determines the end date for the recurring payments. Required date format: mm/dd/yyyy.</td>
<td>10</td>
<td>alphanumeric</td>
</tr>
</tbody>
</table>
| RECURRING_FREQUENCY        | If the uPay site accepts recurring payments, this parameter sets the frequency of the scheduled payments. Accepted values: 1 (Monthly), 2 (Bi-Monthly), 4 (Weekly), 5 (Quarterly), 6 (Semi-Annually), and 7 (Annually).  
**Note:** For RECURRING_FREQUENCY, be sure to use the accepted numerical values. For example, to set up a weekly recurring payments, send RECURRING_FREQUENCY=4; Do not send RECURRING_FREQUENCY=Weekly. | unlimited     | numeric       |
| RECURRING_NUMBER_OF_PAYMENTS| If the uPay site accepts recurring payments, this parameter determines the number of scheduled recurring payments.                                                                                           | unlimited     | numeric       |

*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.*
<table>
<thead>
<tr>
<th>Parameters</th>
<th>Description</th>
<th>Field Length</th>
<th>Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUCCESS_LINK</td>
<td>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.</td>
<td>unlimited</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>SUCCESS_LINK_TEXT</td>
<td>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.</td>
<td>unlimited</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>ERROR_LINK</td>
<td>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.</td>
<td>unlimited</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>ERROR_LINK_TEXT</td>
<td>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.</td>
<td>unlimited</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>CANCEL_LINK</td>
<td>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.</td>
<td>unlimited</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>Parameters</td>
<td>Description</td>
<td>Field Length</td>
<td>Data Type</td>
</tr>
<tr>
<td>--------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>CANCEL_LINK_TEXT</td>
<td>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).</td>
<td>unlimited</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>CREDIT_ACCT_CODE</td>
<td>(Only for use with Banner by Ellucian general ledger integration.) 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 Banner detail code.</td>
<td>unlimited</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>DEBIT_ACCT_CODE</td>
<td>(Only for use with Banner by Ellucian general ledger integration.) 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 Banner detail code.</td>
<td>unlimited</td>
<td>alphanumeric</td>
</tr>
</tbody>
</table>

### 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:
<table>
<thead>
<tr>
<th>HTML Element</th>
<th>Attributes</th>
</tr>
</thead>
</table>
| `<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. |
| `<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 characters.  
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. |
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.

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 410). 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 392.

### An HTML Form Example

Here is an example that shows what an HTML form might look like that passes parameters to a uPay site:

```html
<form action="https://someserver/upay/web/index.jsp" method="post">
  <input type="hidden" name="UPAY_SITE_ID" value="3">
  <input type="hidden" name="EXT_TRANS_ID" value="x">
  <input type="hidden" name="AMT" value="y">
  <input type="submit" value="Click Here To Pay">
</form>
```

In this example, three parameters are passed to uPay. First, the identifying numeric value for UPAY_SITE_ID is passed. This value identifies the uPay site. Second, a transaction ID is passed. This parameter is named EXT_TRANS_ID. And third, a dollar amount for the transaction is passed. This parameter is named AMT.

**Note:** In this example, the UPAY_SITE_ID value can be entered as a static part of the form; however, both the EXT_TRANS_ID value and the AMT value should be determined dynamically. In this way, a unique transaction...
ID is established for each transaction, and the appropriate dollar amount for the customer’s transaction is passed to uPay.

On a web page, this HTML creates a submit button that looks like this (in Windows XP with Internet Explorer 6.0):

When the Click Here to Pay button is clicked, the parameters are passed to the uPay site, and the site is loaded in the customer’s browser:

Notice the dollar amount has been passed to the page. The uPay site is now ready for the customer to select a payment method and complete the transaction.

10.4 Using the VALIDATION_KEY Option

If a uPay site has been configured to accept a passed amount from the campus web application, TouchNet recommends that the VALIDATION_KEY parameter also be passed.

Important! The use of an encoded validation key helps to ensure the integrity of transaction amounts that are passed to uPay by a campus web application.

In order to use the VALIDATION_KEY option, the following actions must be taken:

- The "Require encoded validation key for amount?" field on the uPay Payment Settings page must be set to Yes. (For more information, see "uPay Site Configuration for the VALIDATION_KEY Option" on page 405.)
• 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 405.)

• The campus web application must determine the value for the VALIDATION_KEY parameter as described in "Creating a VALIDATION_KEY" on page 407.

• The campus web application must pass a transaction amount (AMT) as an input parameter. (For more information, see "About the AMT Parameter" on page 408.)

• 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 409.)

• 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 409.)

If any part of this configuration has not been completed, uPay will not accept the payment.

The following subsections provide the details for using the VALIDATION_KEY option.

### uPay Site Configuration for the VALIDATION_KEY Option

To configure a uPay site for using the VALIDATION_KEY option, follow these steps:

1. Go to the following page in the Operations Center: Marketplace Home > [merchant name] > uPay Sites > [upay site name] > Payment Settings

   ![Payment Settings page](image)

   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 407).

Because the campus web application uses this value but does NOT pass this value to the uPay site, the "Passed Amount Validation Key" can then be used by uPay to validate the encoded VALIDATION_KEY parameter.

You should work with the administrator of the campus web application to determine the value of the "Passed Amount Validation Key" field.

5 In addition, you should consider the following fields:

- **Allow the user to edit the payment amount?**—If you do not want the dollar amount to be changed when the customer arrives at the uPay site, you should select No. In this situation, the dollar amount passed in will be displayed, but it will not be editable. If you select Yes, the customer will be able to edit the amount, possibly even choosing a smaller amount (as dictated by the amount entered in the Minimum Payment Amount field).

- **Minimum Payment Amount**—You should ensure that the amount being passed in is equal to or greater than the amount entered in the Minimum Payment Amount field. If the minimum payment amount is greater than the amount being passed in, Marketplace will not be able to complete the transaction.

- **Maximum Payment Amount**—You should ensure that the amount being passed in is equal to or less than the amount entered in the Maximum Payment Amount field.

- **Validate External Transaction ID is unique to the uPay site?**—We recommend the campus web application uses unique External Transaction IDs with each transaction. By taking this action, the campus web application helps to further ensure the integrity of the VALIDATION_KEY parameter. (For more about the EXT_TRANS_ID parameter, see "Passing a VALIDATION_KEY to a uPay Site" on page 409.)

5 Click the Save button.
Creating a VALIDATION_KEY

The process of creating a VALIDATION_KEY must be done by the campus web application. The process must be performed according to the methodology described below.

**Important!** Please forward the following information regarding the creation of a VALIDATION_KEY to the administrator responsible for the campus web application that will communicate with uPay.

**Important!** To use the VALIDATION_KEY option, the administrator of the campus web application must have prior experience in MD5 (Message-Digest algorithm 5) and Base64 encoding. It is beyond the scope of this document to describe how to create an MD5 hash. Likewise, it is beyond the scope of the document to describe how to perform Base64 encoding.

The following steps should not be considered static steps that create a static value. These steps should be dynamically performed by the campus web application for each uPay transaction.

Use the following steps to create the encoded value for the VALIDATION_KEY parameter:

1. Create a text string in this format:
   
   [Passed Amount Validation Key][EXT_TRANS_ID][AMT].

   - **Passed Amount Validation Key**—The "Passed Amount Validation Key" is a unique identifying code. The uPay site manager and the administrator of the campus web application must agree on this value. The value must be stored as part of the campus web application. The uPay site must also be configured with this value, as described in "uPay Site Configuration for the VALIDATION_KEY Option" on page 405. 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 409. 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 408. 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 409.

An Example of Creating a VALIDATION_KEY

Here is an example of creating a VALIDATION_KEY. We will use the following values: "Passed Amount Validation Key"=EX123, EXT_TRANS_ID=123456, and AMT=100.00. Here is the resulting text string for these values:

EX123123456100.00

When you encode this text string, here is the resulting MD5 hash:

231cd7f8e0151f6e0c4a60b33752a1e7

When you encode this MD5 hash value (which is in hex format), here is the resulting Base64 value:

IxzX+OAVH24MSmCzh5Kh5w==

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 Base64 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 405.

The AMT parameter automatically completes the Payment Amount field when the customer arrives at the uPay site.

The value of the parameter is a maximum of 8 numeric characters, including two numeric characters to the right of the decimal point. Dollar values are NOT required to include cents. For example, $25 could be represented as 25 or 25.00. However, you MUST use the same value for AMT when generating the VALIDATION_KEY value as when passing the AMT parameter to uPay.

Maximum value for AMT parameter: 99999.99.

About the EXT_TRANS_ID Parameter

The EXT_TRANS_ID parameter must be passed in order to use the VALIDATION_KEY option. In addition, the EXT_TRANS_ID parameter must be used by the campus web application in determining the value of the VALIDATION_KEY parameter.

The EXT_TRANS_ID parameter serves as a cross-reference between the web application and Marketplace. The value of the parameter will be stored in the Marketplace database along with information about the transaction.

We recommend the campus web application uses unique External Transaction IDs with each transaction. By taking this action, the campus web application helps to further ensure the integrity of the VALIDATION_KEY parameter.

If you select Yes for "Validate External Transaction ID is unique to the uPay site?" on the uPay Payment Settings page, uPay will validate that the submitted EXT_TRANS_ID value has not previously been used. (However, this EXT_TRANS_ID value CAN be used by other uPay sites.) If this value is not passed, or if the value is not unique, the customer will not be able to complete the transaction.

The EXT_TRANS_ID is a maximum of 250 alphanumeric characters.

Passing a VALIDATION_KEY to a uPay Site

When transactions are initiated by a campus web application that uses the VALIDATION_KEY option, the web application must be configured to dynamically generate a VALIDATION_KEY value (as described in "Creating a VALIDATION_KEY" on page 407) 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:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>UPAY_SITE_ID</td>
<td>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 &gt; [merchant name] &gt; uPay Sites &gt; [upay site name] &gt; Form Parameters).</td>
</tr>
<tr>
<td>EXT_TRANS_ID</td>
<td>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.</td>
</tr>
<tr>
<td>AMT</td>
<td>AMT is the amount of the transaction. Be sure you use the same value that was used when the VALIDATION_KEY was created.</td>
</tr>
<tr>
<td>VALIDATION_KEY</td>
<td>Use the encoded VALIDATION_KEY value that you determined as described in &quot;Creating a VALIDATION_KEY&quot; on page 407.</td>
</tr>
</tbody>
</table>

When the parameters are passed to the uPay site, the site loads in the customer’s browser with the Payment Amount field pre-populated. The uPay site is now ready for the customer to select a payment method and complete the transaction.

### 10.5 Using a Posting URL

After a transaction is processed (or recurring payments are scheduled), uPay can pass parameters describing the transaction back to a campus web application. This information can include parameters that were initially
passed to uPay from a web application, such as a payment amount or a transaction ID, as described in “Passing Parameters to Your uPay Site” on page 392. 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:

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.
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:

<table>
<thead>
<tr>
<th>Parameters</th>
<th>Description</th>
<th>Field Length</th>
<th>Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>posting_key</td>
<td>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 &quot;Miscellaneous: Links, URLs, and E-mail&quot; on page 371.)</td>
<td>30</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>tpg_trans_id</td>
<td>A reference number assigned by Payment Gateway.</td>
<td>unlimited</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>pmt_status</td>
<td>Status of the transaction as reported by Payment Gateway. Either “success” or &quot;cancelled&quot;.</td>
<td>unlimited</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>pmt_amt</td>
<td>Amount of the transaction processed by Payment Gateway. (Maximum value: $99,999.99.) For recurring 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 &quot;setup&quot; or &quot;payment&quot;) to determine if pmt_amt represents a total for all recurring payments or the amount for an individual recurring payment.</td>
<td>8 (including 2 characters after the decimal point)</td>
<td>numeric</td>
</tr>
<tr>
<td>pmt_date</td>
<td>Date the transaction was processed by Payment Gateway. (Format: mm/dd/yyyy.)</td>
<td>unlimited</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>Parameters</td>
<td>Description</td>
<td>Field Length</td>
<td>Data Type</td>
</tr>
<tr>
<td>------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------</td>
<td>---------------</td>
</tr>
<tr>
<td>name_on_acct</td>
<td>Name on credit card account or bank account.</td>
<td>50</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>acct_addr</td>
<td>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.</td>
<td>35</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>acct_addr2</td>
<td>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.</td>
<td>35</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>acct_city</td>
<td>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.</td>
<td>35</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>acct_state</td>
<td>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.</td>
<td>2</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>acct_zip</td>
<td>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.</td>
<td>30</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>acct_country</td>
<td>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 <a href="http://www.iso.org/iso/country_codes.htm">www.iso.org/iso/country_codes.htm</a>. This parameter is passed only if the uPay site has been set up to require address verification data.</td>
<td>2</td>
<td>alphabetic</td>
</tr>
<tr>
<td>acct_email_address</td>
<td>The customer can be required to enter an e-mail address or this field can be optional.</td>
<td>50</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>acct_phone_day</td>
<td>This phone field is an optional entry field.</td>
<td>20</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>acct_phone_night</td>
<td>This phone field is an optional entry field.</td>
<td>20</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>acct_phone_mobile</td>
<td>This phone field is an optional entry field.</td>
<td>20</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>EXT_TRANS_ID</td>
<td>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.</td>
<td>250</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>Parameters</td>
<td>Description</td>
<td>Field Length</td>
<td>Data Type</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------</td>
<td>----------------</td>
</tr>
<tr>
<td>UPAY_SITE_ID</td>
<td>A unique ID that identifies the uPay site. Assigned by Marketplace when the uPay site was created.</td>
<td>unlimited</td>
<td>numeric</td>
</tr>
<tr>
<td>sys_tracking_id</td>
<td>An internal Marketplace identifier (also known as the order ID) that is displayed to the customer on the uPay receipt page.</td>
<td>unlimited</td>
<td>numeric</td>
</tr>
<tr>
<td>recurring_payment_type</td>
<td>This value is only specified if the payment is a recurring payment. Two values are possible: &quot;setup&quot; (for the initial setup of recurring payments) and &quot;payment&quot; (for a single recurring payment).&lt;br&gt;&lt;br&gt;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 &quot;setup&quot; or &quot;payment&quot;) to determine if pmt_amt represents a total for all recurring payments or the amount for an individual recurring payment.</td>
<td>unlimited</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>recurring_setup_number_of_payments</td>
<td>This value is specified for uPay-driven recurring payments and indicates the total number of payments.</td>
<td>unlimited</td>
<td>numeric</td>
</tr>
<tr>
<td>recurring_setup_start_date</td>
<td>This value is specified for uPay-driven recurring payments and indicates the date of the first scheduled payment. (Format: mm/dd/yyyy.)</td>
<td>10</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>recurring_setup_end_date</td>
<td>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 &quot;recurring_setup_end_date&quot;. (Format: mm/dd/yyyy.)</td>
<td>10</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>recurring_setup_frequency</td>
<td>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.</td>
<td>unlimited</td>
<td>numeric</td>
</tr>
</tbody>
</table>
### Additional parameters for credit card transactions:

<table>
<thead>
<tr>
<th>Parameters</th>
<th>Description</th>
<th>Field Length</th>
<th>Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>card_type</td>
<td>Type of credit card: MasterCard, Visa, AmEx, Discover, etc.</td>
<td>unlimited</td>
<td>alphanumeric</td>
</tr>
</tbody>
</table>

### Additional parameters for ACH transactions:

<table>
<thead>
<tr>
<th>Parameters</th>
<th>Description</th>
<th>Field Length</th>
<th>Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>bank_name</td>
<td>These values are obtained from Payment Gateway based on the routing number entered</td>
<td>unlimited</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>bank_addr1</td>
<td>These values are obtained from Payment Gateway based on the routing number entered</td>
<td>unlimited</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>bank_addr2</td>
<td>These values are obtained from Payment Gateway based on the routing number entered</td>
<td>unlimited</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>bank_routing_num</td>
<td>These values are obtained from Payment Gateway based on the routing number entered</td>
<td>unlimited</td>
<td>alphanumeric</td>
</tr>
</tbody>
</table>

### Parameters for cancellations:

<table>
<thead>
<tr>
<th>Parameters</th>
<th>Description</th>
<th>Field Length</th>
<th>Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>posting_key</td>
<td>A security value specified when the uPay site was built. (See &quot;Miscellaneous: Links, URLs, and E-mail&quot; on page 371.)</td>
<td>unlimited</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>pmt_status</td>
<td>This value is always &quot;cancelled&quot; for cancellations.</td>
<td>unlimited</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>EXT_TRANS_ID</td>
<td>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.</td>
<td>250</td>
<td>alphanumeric</td>
</tr>
<tr>
<td>UPAY_SITE_ID</td>
<td>A unique ID that identifies the uPay site. Assigned when the uPay site was created.</td>
<td>unlimited</td>
<td>numeric</td>
</tr>
</tbody>
</table>

### About Recurring Payment Parameters

For recurring payments, the following parameters are passed when recurring payments are established and for each subsequent recurring payment that is processed:

- sys_tracking_id
- posting_key
- name_on_acct
- acct_addr
• acct_addr2
• acct_city
• acct_state
• acct_zip
• acct_country
• acct_email_address
• acct_phone_day
• acct_phone_night
• acct_phone_mobile
• UPAY_SITE_ID
• card_type
• pmt_amt
• recurring_payment_type
• recurring_setup_number_of_payments
• recurring_setup_start_date
• recurring_setup_end_date
• recurring_setup_frequency

And the following additional parameters are passed for each recurring payment that is processed (and not when the recurring payments are established):

• pmt_status
• pmt_date
• tpg_trans_id

10.6 Bringing Your uPay Site Online

After you have created a uPay site and (if applicable) linked to the site from a campus application, you will need to bring the uPay site online.

**Note:** To bring a uPay site online, you must be either the merchant manager over that uPay site or one of its site managers.

Follow these steps to bring a uPay site online:

2. Choose ONLINE from the uPay Site Status dropdown menu.
3. Click the Save button.
After you have completed these steps, your uPay site is live and can start receiving payments. We recommend you test the site first. You should contact the administrator of the campus web application and coordinate a test plan to ensure that transaction parameters are being correctly passed.
11.0 Managing a uPay Site

In this section, we’ll review the ways you can update your uPay site and the ongoing tasks you may need to do as a uPay Site Manager.

11.1 Changing uPay Site Features

A uPay site’s merchant manager or site manager can update settings for the uPay site. To update settings for a uPay site, click the site’s name on the Marketplace home page. The left navigation menu will display the settings pages for the site.

Many of the Marketplace Operations Center pages for uPay settings are the same pages used for setting up the site:

- **Payment Settings**—Change required payment and amount configuration. (See "Payment Settings" on page 359.)
- **Recurring Settings**—Change settings for recurring payments. (See "Recurring Payments" on page 368.)
- **Miscellaneous**—Change navigation, privacy, and e-mail contact information. Also, take the site offline or bring it online. (See "Miscellaneous: Links, URLs, and E-mail" on page 371.)
- **Messages and Titles**—Change message text in your pages. (See "Messages and Titles" on page 380.)
- **Image Management**—Upload new site images. (See "uPay Site Images" on page 387.)

Some additional settings/features are outside of the uPay site creation process:

- **Style Sheets**—Download and upload the style sheet used by your uPay site. (See "Style Sheet Modifications" on page 420.)
- **User Maintenance**—Grant uPay user roles and edit existing users. (See "Adding uPay Site Users" on page 428, "Editing uPay Site User Roles" on page 429, and "Deleting a uPay Site" on page 428.)
- **Payment Search**—Search for payments, refund payments, and cancel scheduled payments. (See "Payment Search, Refunds, and Cancellations" on page 430.)
11.2 Style Sheet Modifications

uPay site managers can modify the layout of uPay sites by uploading a revised style sheet or by uploading a supplementary style sheet. For an example of how uPay site layout can be affected through style sheet modifications, see “uPay Style Sheets” on page 349.

The site manager begins the process of modifying a uPay style sheet by navigating to the uPay Site Style Sheets page.

[merchant name] > uPay Sites > [uPay site name] > Layout Selection

The uPay Site Style Sheets page then appears:

You can modify uPay site layout by using the uPay Site Style Sheets page.

The following types of style sheets can be used with a uPay site:

- **uPay Style Sheet**—The uPay Style Sheet section on this page allows you to download the default uPay stylesheet. You can also download and upload a revised uPay style sheet. The default uPay style sheet is always available for download. After you upload a revised style sheet, you use the radio buttons in the "Use this style sheet" column to select which style sheet to use with the uPay site. You can also revert to the default uPay style sheet. (Required filename: upay.css.)

- **Supplementary Style Sheets**—The Supplementary Style Sheets section on this page allows you to upload up to five supplementary style sheets as necessary.
Modifying the uPay Style Sheet

Use the following steps for modifying a uPay style sheet:

1. Click the Download button for "Default uPay style sheet" (or if you have already uploaded a style sheet, click the Download button for "Revised uPay style sheet"). Your browser’s save window will then appear.

2. Save the file.

3. Open the downloaded style sheet in the editor of your choice.

4. Edit the styles as necessary.

**Important!** To ensure that Marketplace remains a secure environment for processing commerce transactions, some commonly used CSS code is not allowed in uploaded style sheets. For critical information about the validation process, see "About the Validation Process" on page 422.

5. Save the style sheet.

6. Rename the style sheet to `upay.css`.

**Note:** Only style sheets named `upay.css` can be uploaded as the revised uPay style sheet.

7. Click the Upload button for "Revised uPay style sheet."

   The Marketplace CSS Upload window appears.

8. Click the Browse button and locate the style sheet that you modified.

9. Click the Upload Now button.

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

**Important!** For critical information about the validation process, see "About the Validation Process" on page 422.

10. Select the radio button for "Revised uPay style sheet" in order to activate your modified style sheet.

11. Click the Save button.

Using Supplementary Style Sheets

As an alternative to modifying the uPay style sheet, you can use the "Supplementary Style Sheets" feature to upload additional style sheets to be used by your uPay site. Supplementary style sheets can be used to override the styles in the uPay style sheet.
When the uPay site loads in the customer's browser, the uPay style sheet will load first and then the supplementary style sheets (thus overriding the uPay style sheet). Supplementary style sheets might come in handy, for example, if you want to separate uPay styles into multiple style sheets.

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

Like the uPay style sheet, supplementary style sheets must pass a validation process before they can be uploaded. For more information about the validation process, see "About the Validation Process" on page 422.

**About the Validation Process**

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

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

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

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

**Important!** The default uPay style sheet includes a comment at the beginning of the file. This comment identifies the file version. When you download this style sheet, this comment is included in the style sheet. Before you can successfully upload your edited uPay style sheet, you MUST remove this comment.

**uPay HTML Structure**

In order for you to understand which styles to edit when you edit a uPay stylesheet, you will need to be familiar with the underlying HTML structure that determines the uPay site layout.

The HTML structure of uPay web pages is largely comprised of three sections:

- The first section contains the header and the main page elements. These elements appear in a DIV with id="container".
• The second section contains the footer. This element appears in a DIV with id="footer".

The main DIV on uPay web pages has an ID of "container." The footer DIV has an ID of "footer."

• The third section contains the modal windows that open when the links in the bottom navigation bar are clicked. Each of these elements appear in their own DIVs.

uPay uses modal windows for displaying additional information, such as the Privacy Policy.
In order for you to edit the layout of uPay web pages, you will need to understand how the pages are constructed. The following sample of uPay HTML shows the page elements in the "container" DIV.

```html
<div id="container">
  <div id="header">
    <div class="headerImage">
      <img src="/upay60/web/images/upay_0/white-title-upay.png"
           alt="TouchNet Marketplace uPay" />
    </div><!--headerImage-->
  </div><!--header-->
  <div id="content" class="twoColumn">
    <div class="banner">
      <img src="/upay/web/images/upay_0/white-banner.jpg"
           alt="banner" />
    </div>
    <div class="stndForm">
      <div id="upayHeader">Please select a payment method</div>
      <form id="pmtOptionsForm" name="pmtOptionsForm"
            action="/upay/tapp" method="post"
            class="removeExtraSpaceFromFormTags">
        <input type="hidden" name="Navigate" value="payment_options.jsp"/>
        <input type="hidden" name="OnError" value="payment_options.jsp"/>
        <input type="hidden" name="REDIRECT" value=""/>
        <input type="hidden" name="STORE_PAYMENT_OPTIONS"
              value="ActionKey" />
        <p class="required">* Indicates required information</p>
        <p>
          <label for="mptOptionsPaymentAmount">
            Payment Amount:
          </label>
          <span class="requiredMark"></span>
          <input id="pmtOptionsPaymentAmount" class="amount"
                 type="text" name="UPAY_AMOUNT" value="10.00">
        </p>
        <p>
          <label for="pmtOptionsPaymentMethodTypeSelect">
            Payment method:
          </label>
          <select id="pmtOptionsPaymentMethodTypeSelect"
                name="GEN_PAYMENT_METHOD_TYPE_ID"
                onchange="displayRecur()">
            <option value="1" >Credit Card</option>
            <option value="3" >Electronic Check</option>
          </select>
        </p>
        <p class="yesNo">
          Would you like to make recurring payments?:
          <input type="radio" id="pmtOptionsRecurringPaymentYesRadioBtn"
                 class="radio" name="RECURRING_PAYMENT" value="y" />
        </p>
      </form>
    </div>
  </div><!--content-->
</div><!--container-->
```
HTML of the "footer" DIV

In order for you to edit the layout of uPay web pages, you will need to understand how the pages are constructed. The following sample of uPay HTML shows all the page elements in the "footer" DIV.

```html
<div id="footer">
  <ul class="footerNavigationLinks">
    <li><a href="JavaScript:openDialog('dialogPrivacy','');" class="footerNavigationLink">Privacy Policy</a></li>
    <li>|</li>
    <li><a href="JavaScript:openDialog('dialogHelp','');" class="footerNavigationLink">Help</a></li>
    <li>|</li>
    <li><a href="JavaScript:openDialog('dialogAccessibility','');" class="footerNavigationLink">Accessibility Policy</a></li>
    <li>|</li>
    <li><a href="JavaScript:openDialog('dialogReturnPolicy','');" class="footerNavigationLink">Return Policy</a></li>
  </ul>

  <div class="footerImage">
    <img src="/upay/web/images/upay_0/footer-back-cccccc.png" alt="TouchNet Marketplace uPay" />
  </div>

  <div class="footerLogo">
    <img src="/upay/web/images/tnsecured_logo.png" alt="TouchNet Secured" />
  </div>
</div>
```
HTML of Modal Windows

In order for you to edit the layout of uPay web pages, you will need to understand how the pages are constructed. The following example of HTML for a uPay modal window is typical for uPay. All four links (Privacy Policy, Help, Accessibility Policy, and Return Policy) in the bottom navigation bar use modal windows.

```html
<div id="dialogPrivacy" class="dialog" title="Privacy Policy">
  <div class="storeItems noBottomBorder">
    Privacy policy text.
  </div>
</div>
```

You enter HTML for modal windows on the Miscellaneous Settings page of each uPay site. When a uPay site loads in the customer's browser, this HTML appears in the "storeItems" DIV. In order to format this HTML, you will need to assign new styles to the HTML. You can set the styles for these page elements by uploading a revised or supplementary style sheet (or by using in-line styles).

Style Sheet Image Management

If the style sheet for a uPay site references any images, a uPay site manager can upload these images by using the Style Sheet Image Management section of the uPay Site Style Sheets page:

```[merchant name] > uPay Sites > [uPay site name] > Style Sheets```

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

```
Style Sheet Image Management

If you choose to upload images in association with the uPay site and the style sheets listed above, your context will be as follows. An example would be: ../style_images/uPay_background_primary.png

Context paths: ../style_images/uPay_0/```

```
Images

<table>
<thead>
<tr>
<th>Image Name</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Images</td>
<td></td>
</tr>
</tbody>
</table>

Upload Image```

Store managers manage images by using the Single Store Style Sheet Settings page.

The top part of the Style Sheet Image Management section describes the context path for images. You will need to use this context path in order to reference the images that you upload.
The lower part of the Style Sheet Image Management section lists the images that have been uploaded. You can use the View button to open the Marketplace View Style Image window with the corresponding image displayed. You can use the Remove button to remove the reference to the image from the Marketplace database.

To upload an image, follow these instructions:

1. Select the Upload Image button. The Marketplace Image Upload window then appears.

   ![Marketplace Image Upload window](image)

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

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

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

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

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

### 11.3 Taking Your uPay Site Offline

If you need to remove your uPay site from active status, you can change its status to offline. Once the status is changed to offline, the uPay site will no longer accept payments.

**Note:** To take a uPay site offline, you must be either the merchant manager over that uPay site or one of its site managers.

Follow these steps to take a uPay site offline:

2. Choose OFFLINE from the uPay Site Status dropdown menu.

3. Click the Save button.

### 11.4 Deleting a uPay Site

You can delete uPay sites; however, you cannot delete a uPay site if it has accepted any transactions. If a uPay site has accepted transactions in the past but you would like to deactivate the site, you should use the site’s Miscellaneous Settings page to take the uPay Site offline.

**Note:** To delete a uPay site, you must be either the merchant manager over that uPay site or one of its Site Managers.

Follow these steps to delete a uPay site:


2. Click the Delete uPay Site button. A confirm window appears.

3. Click OK to confirm deletion of the uPay site.

### 11.5 Adding uPay Site Users

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

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

Follow these steps to add a uPay site manager, payment clerk, or accountant.

**Note:** Only a merchant manager or uPay site manager can add uPay site users.

1. From the left navigation menu, navigate to Marketplace Home > [merchant] > uPay Sites > [uPay Site] > Users. The [uPay Site] Users page appears.

2. Click the View U.Commerce Users link near the top of the page. The U.Commerce Users page appears.
3 Find the corresponding user and then click the Edit User text link in the Action column. The Edit User page appears.

<table>
<thead>
<tr>
<th>Edit User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add or remove user roles. User changes will be effective at next login.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>User Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status: Enabled</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>User Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.Commerce Username: TNDY.owilliams</td>
</tr>
<tr>
<td>First Name:</td>
</tr>
<tr>
<td>Last Name:</td>
</tr>
<tr>
<td>U.Commerce Email:</td>
</tr>
<tr>
<td>Email:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Marketplace Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assigned Roles</td>
</tr>
<tr>
<td>None</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

| Remove Roles | Add Roles |

Note: For more information about the uPay user roles, see "uPay User Roles" on page 336.

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.

11.6 Editing uPay Site User Roles

Follow these steps to edit user roles for uPay site managers, payment clerks, and store accountants.

Note: Only uPay site managers can edit these roles.

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.

![Edit User Page](image)

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 14.

4 Click the Add Roles button to add the available roles to the user.

   OR

   Click the Remove Roles button to remove roles from the user.

11.7 Payment Search, Refunds, and Cancellations

A uPay site manager, a merchant manager, and a uPay site payment clerk all have the ability to look up the records of payments submitted via uPay. Options to refund payments or cancel upcoming recurring payments are available in the payment record details.
Customers who make recurring payments are prompted for contact information. If you need to contact a customer, you can use Payment Search to look up any e-mail address or phone number the customer may have entered.

To navigate to Payment Search, go to Marketplace Home > [merchant name] > uPay Sites > [uPay site name] > Payment Search.

### Look Up a Payment

To look up a payment, enter one or more search criteria on the uPay Payment Search page. uPay site managers and uPay payment clerks (as well as merchant managers) can look up uPay payments.

The uPay Payment Search page provides several ways to search for payments.

The following types of searches are available:

- **System Tracking ID**—This internal Marketplace identifier is displayed to the customer on the uPay receipt page.

- **Payment Gateway Reference Number**—This reference number is assigned by Payment Gateway.

- **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.

- **Customer Phone Number**—If the customer entered a telephone number on the uPay site (or if this value was passed to uPay from the campus web application), you can search for the payment by using the customer’s telephone number.

- **Customer E-mail Address**—If the customer is required to enter an e-mail address on the uPay site (or if this value was passed to uPay from the campus web application), you can search for the payment by using the customer’s e-mail address.

- **Linked Session ID**—This search field only appears if the uPay site uses T-Link. This value is sent as a posting parameter to the campus web application.
• **Order Date**—You can search by date ranges. You must select specific start and end dates for the search. Searches by date are likely to return multiple records.

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.

The payment search returns records of any payments made that fit all the search criteria you entered.

Click the system tracking ID to see more detailed information about the payment, or to refund or cancel the transaction.

<table>
<thead>
<tr>
<th>System Tracking ID</th>
<th>Order Date</th>
<th>Customer Name</th>
<th>Customer Email</th>
<th>External Transaction ID</th>
<th>Processed Amount</th>
<th>Payment Method Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>155</td>
<td>04/24/2012 10:39:31 AM CT</td>
<td>Dawn Williams</td>
<td><a href="mailto:dawn.williams@touchnet.com">dawn.williams@touchnet.com</a></td>
<td>A214</td>
<td>$10.00</td>
<td>MasterCard</td>
</tr>
<tr>
<td>136</td>
<td>05/01/2012 09:01:29 AM CT</td>
<td>Test User</td>
<td><a href="mailto:test.user@touchnet.com">test.user@touchnet.com</a></td>
<td>A214</td>
<td>$10.25</td>
<td>MasterCard</td>
</tr>
<tr>
<td>157</td>
<td>08/23/2012 04:19:25 PM CT</td>
<td>Darlene William</td>
<td><a href="mailto:darlene.william@touchnet.com">darlene.william@touchnet.com</a></td>
<td>A214</td>
<td>$400.00</td>
<td>MasterCard</td>
</tr>
<tr>
<td>158</td>
<td>08/23/2012 04:24:35 PM CT</td>
<td>Darlene William</td>
<td><a href="mailto:darlene.william@touchnet.com">darlene.william@touchnet.com</a></td>
<td>A214</td>
<td>$50.25</td>
<td>WebCheck</td>
</tr>
<tr>
<td>159</td>
<td>08/24/2012 09:50:02 AM CT</td>
<td>Darlene William</td>
<td><a href="mailto:darlene.william@touchnet.com">darlene.william@touchnet.com</a></td>
<td>A214</td>
<td>$400.00</td>
<td>MasterCard</td>
</tr>
</tbody>
</table>

*Results of a payment order search*

**Reviewing Payment Details**

The Payment Details view includes a top "Order Details" section, a middle "Pending Payments" section, and a bottom "Completed Payments" section.
The Payment Details page shows completed payments, as well as pending payments, for the specified time period.

One-time pending payments are shown on a single line in the "Pending Payment" section. However, recurring pending payments are shown on multiple lines—one line for each payment to be made. For recurring payments, the "Payment Date" entry in the Details section indicates when the recurring payments were set up. The first payment may have been scheduled to occur after that date.

Refund a Payment

If the payment has been processed and has not already been refunded, its detailed record will include a Refund link. You can process refunds either for credit card payments or ACH payments.

uPay site managers and uPay payment clerks can process refunds.

To refund a payment:


2. Search for the payment to refund (as described in "Look Up a Payment" on page 431).

3. In the search results, click the payment’s system tracking ID. The Payment Details page appears.
4. Click the Refund link of the corresponding completed payment. The Refund Options pop-up window appears.

For recurring payments, the following dialog window appears.

Note: You cannot make a partial refund of a uPay recurring payment installment. Only full refunds are available for recurring payments.

5. For one-time payments, select either partial or full refund, enter a refund amount, and then click Submit.

For recurring payments, select OK to refund the payment in its entirety.

Note: Payment refunds are processed through TouchNet Payment Gateway. When you set up your Marketplace Merchant, you associated it with a host system account. In Payment Gateway, this host system account is linked to a bank account. So when you process a refund, the money flows from that bank account back to the user’s account.

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:


2. Search for the payment to refund (as described in "Look Up a Payment" on page 431).

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 credit card number), the uPay site manager can offer the following alternative to the customer: 1) the uPay site manager can cancel all remaining payments for the customer, and 2) the customer can create a recurring payment schedule, using the new payment information.
12.0 Automatic E-mail Messages

After a customer enters payment information at a uPay site for a one-time payment, the customer receives a notification-of-payment e-mail message. Likewise, after a recurring payment is established, the customer receives an e-mail message after each subsequent payment takes place. The notification message for one-time payments is not editable. The notification message for recurring payments is editable.

12.1 Examples of E-mail Messages

Here is an example of a notification message for a one-time payment:

![Notification of Payment]

Here is an example of a notification message for a recurring payment:
Hello,

This is an automated message to inform you that your scheduled payment has been completed successfully. Payment details are listed below. Please note that all payments are subject to approval and final verification.

======== PAYMENT DETAILS =======
Customer Name --- John Doe
Payment Date --- 2013-12-30 01:20:08
Amount --- $330.00
Payment Method --- MasterCard
Payment Gateway Reference Number --- 53565635656
System Tracking ID --- 1113
=================================

Sincerely,
University Billing Department

12.2 Editing E-mail Messages

The notification message for one-time payments is not editable. The notification message for recurring payments is editable.

Editing Recurring Payment E-mail Messages

Recurring payment e-mail messages can only be changed by directly editing the template files. These files can be found in the following location: touchnet\marketplace\sys\tmsrecur. Look for the following three files:

• success_template.txt
• failure_template.txt
• error_notification_template.txt

Note: If these files need to be edited, you should contact your Marketplace administrator. These files cannot be edited with the Marketplace Operations Center.

Here is an example of the success_template.txt file.
Hello,

This is an automated message to inform you that your scheduled payment has been completed successfully. Payment details are listed below. Please note that all payments are subject to approval and final verification.

------------- PAYMENT DETAILS -------------
Customer Name --- {{/TOUCHNET/PAYMENT_METHOD/ADDRESS[@TYPE='billing']/NAME}}
Payment Date --- {{__DATE__}}
Amount --- {{__AMOUNT__}}
Payment Method --- {{/TOUCHNET/PAYMENT_METHOD/HSA_PMT_METH_NAME}}
Payment Gateway Reference Number --- {{__REFERENCE_NUMBER__}}
System Tracking ID --- {{__ORDER_ID__}}

----------------------------------------------

Sincerely,

University Billing Department

You can edit any character in the template except for the value declarations in double curly brackets {{ }}. In a similar fashion, you can also edit the failure_template.txt and error_notification.txt.

**Important!** Be sure not to edit the value declarations in double curly brackets or you may disable e-mail messages for recurring payments.

### 12.3 uPay E-mail Addresses

The e-mail addresses that will be used as the “from” addresses for Marketplace uPay e-mail messages depend on the types of e-mail messages being generated. The following table describes each type of Marketplace uPay e-mail message and defines which e-mail addresses are used.
<table>
<thead>
<tr>
<th>This message type</th>
<th>Uses this e-mail address in the &quot;from&quot; field</th>
</tr>
</thead>
<tbody>
<tr>
<td>One-time payment confirmation</td>
<td>The e-mail address entered in the &quot;Site Manager’s E-mail Address&quot; field on the uPay site’s Miscellaneous Settings page.</td>
</tr>
<tr>
<td></td>
<td>If no e-mail address is entered in the &quot;Site Manager’s E-mail Address&quot; field, then the e-mail address named in the uPay critical.prp file will be used. (The e-mail address in the critical.prp file was named when Marketplace was set up. If this address must be changed, you should contact your Marketplace administrator.)</td>
</tr>
<tr>
<td>Recurring payment confirmation</td>
<td>The e-mail address named in the AliveCheck.mail.from field of the tmsrecur.prp file.</td>
</tr>
</tbody>
</table>

**About Recurring Payments Announcements**

All recurring payment confirmations for all Marketplace merchants—for both uStores and uPay—use the same “from” e-mail address. This e-mail address can be configured with the AliveCheck.mail.from field in the tmsrecur.prp file.
Part 6: General Ledger Information
13.0 General Ledger Information

When general ledger functionality is enabled, fields become available in the Marketplace Operations Center for establishing accounting codes. These codes can be linked to stores, products, tax rates, shipping rates, and uPay sites. During the fulfillment process, the accounting code values can be communicated to your general ledger system.

This section describes how to use the Marketplace Operations Center to set up accounting codes, turn on general ledger functionality, and link accounting codes to various Marketplace purposes.

Because Marketplace can be integrated with Ellucian's Banner by Ellucian, PeopleSoft, and Ellucian's Colleague, additional setup information is provided for using the Marketplace Operations Center to establish general ledger integration for Ellucian's Banner by Ellucian, PeopleSoft, and Ellucian's Colleague.

General Ledger Integration for Banner

If your institution uses Ellucian's Banner by Ellucian system, you can integrate its general ledger functionality with TouchNet Marketplace. When general ledger functionality is used with Marketplace, Banner Detail Codes can be established and associated with Marketplace stores, uPay sites, products, tax rates, and shipping rates.

When general ledger functionality is enabled, fields become available in the Marketplace Operations Center for entering Banner Detail Codes and cashier IDs. These values become linked to Marketplace accounting codes and transactions. During the fulfillment process, the Banner Detail Codes are communicated to the Banner by Ellucian database for use in its general ledger module.

Integration of Banner by Ellucian and Marketplace involves the following actions: 1) configuring Payment Gateway, 2) editing the Marketplace critical.prp file, and 3) configuring Marketplace for using Banner by Ellucian general ledger functionality. Only the third action is covered in the Marketplace 6.5 User Guide. The first two actions (as well as the third action) are covered in the following guide: "Banner by Ellucian Setup Guide for Marketplace."

General Ledger Integration for Ellucian's Colleague

If your institution uses the Ellucian's Colleague system, you can integrate its general ledger functionality with TouchNet Marketplace. When general ledger functionality is used with Marketplace, Ellucian's Colleague general ledger codes can be established and associated with Marketplace stores, uPay sites, products, tax rates, and shipping rates.

When general ledger functionality is enabled, fields become available in the Marketplace Operations Center for entering Ellucian's Colleague general ledger codes. These values become linked to Marketplace accounting codes and transactions. During the fulfillment process, the Ellucian's Colleague general ledger codes are communicated to the Ellucian's Colleague system for use in its general ledger module.
Integration of Ellucian's Colleague and Marketplace involves the following actions: 1) configuring Payment Gateway, 2) editing Marketplace properties files, and 3) configuring Marketplace for using Ellucian's Colleague general ledger functionality. Only the third action is covered in the Marketplace 6.5 User Guide. The first two actions are covered in the following guide: "Ellucian's Colleague Setup Guide for Marketplace."

If your institution uses PeopleSoft Enterprise Financials software, you can integrate its general ledger functionality with TouchNet Marketplace. When general ledger functionality is used with Marketplace, SpeedType codes and business unit information from PeopleSoft Enterprise Financials can be associated with Marketplace accounting codes and reported for transactions.

Integration of PeopleSoft Enterprise Financials and Marketplace involves the following actions: 1) configuring payment methods in Payment Gateway, 2) editing the Marketplace critical.prp file, and 3) configuring Marketplace for using accounting codes that are associated with PeopleSoft SpeedType codes and business units. Only the third action is covered in the Marketplace 6.5 User Guide. The first two actions are covered in the following guide: "PeopleSoft Setup Guide for Marketplace."

TouchNet Marketplace offers direct integration with Banner, Colleague, and PeopleSoft. If your institution uses a different general ledger system, you may be able to use Marketplace’s GL lockbox integration option. This integration option allows general ledger codes to be established and associated with Marketplace stores, products, tax rates, shipping rates, and uPay sites.

GL lockbox Integration involves the following actions: 1) installing TouchNet Lockbox software and TouchNet GL Validator software, 2) determining the flat file ledger format for the GLimport files, 3) editing the Lockbox files to meet the output needs of your institution, 4) creating data files in CSV format that include the necessary general ledger codes for your system, 5) configuring Payment Gateway, 6) editing Marketplace properties files, and 7) configuring Marketplace for using GL lockbox functionality. Only the final action is covered in the Marketplace 6.5 User Guide. The preceding actions are covered in the following guide: "GL Lockbox Setup Guide for Marketplace."

When general ledger functionality is enabled, fields become available in the Marketplace Operations Center for entering general ledger codes. These values become linked to Marketplace accounting codes and transactions. During the fulfillment process, the accounting codes that you have configured are saved by Marketplace in an output file during the fulfillment process. Depending on the capabilities of your GL system, you may be able to import this flat file ledger file into your your GL system.

**Note:** Prior to Marketplace 6.5, the GL Lockbox system was the recommended method for establishing GL integration with PeopleSoft. Now, however, Marketplace offers direct integration with PeopleSoft.
13.1 About Accounting Codes

Marketplace accounting codes are typically tied to one or more general ledger codes from your school’s general ledger system. These accounting codes represent products, donations, shipping classes, tax revenue, and uPay transactions. When Marketplace stores or uPay sites use general ledger functionality, the associated general ledger codes are saved during the fulfillment process, allowing your general ledger system to keep track of Marketplace revenue.

Before an accounting code can be established, you must ensure the appropriate general ledger codes have been created. Contact your general ledger system administrator for information about the allowable general ledger codes. Likewise, you should contact the general ledger system administrator if a new general ledger code is required.

Who Creates Accounting Codes?

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 450), and merchant managers create merchant-level accounting codes, which are only available for the merchants who created the codes (see "Configuring Merchant Settings" on page 455).

Common accounting codes are typically assigned to tax classes (see "Configuring System Administration Settings" on page 450). 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 455).

Accounting codes are established by merchant managers for four reasons:

- To serve as the default accounting code used by a store (see "Configuring Store Settings" on page 460),
- To serve as the accounting code used by one or more uPay sites (see "Configuring uPay Settings" on page 465),
- To serve as an override accounting code used by one or more products in a store (see "Configuring Store Settings" on page 460), and
- To serve as an override accounting code assigned to a delivery method in a shipping class (see "Configuring Store Settings" on page 460).

You will only see accounting code fields when setting up a product if general ledger features are enabled.
For Banner by Ellucian general ledger reporting, Marketplace accounting codes are tied to Banner detail codes. When Marketplace stores or uPay sites use general ledger functionality, the associated Detail Codes are passed to the Banner by Ellucian system during the fulfillment process.

Marketplace accounting codes are created by administrators and merchant managers. Each accounting code is associated with a detail code (which must come from a list of approved Detail Codes prepared by your institution’s general ledger administrator). During the Marketplace fulfillment process, the detail code is passed to your Banner by Ellucian system.

A Marketplace merchant manager must turn on general ledger functionality (see "Configuring Store Settings" on page 460) before Detail Codes can be associated with the transactions generated by a merchant’s store or uPay site.

**Important!** Before a Marketplace accounting code can be established you must ensure a detail code has been created that can be associated with the accounting code. Contact your general ledger administrator for a list of the approved Detail Codes. Likewise, contact the Banner by Ellucian administrator if a new detail code is required.

Marketplace uses two types of Ellucian’s Colleague general ledger codes: 1) tender GL distribution codes and 2) GL account numbers. Marketplace associates tender GL distribution codes with stores. Each store can have its own tender GL distribution code. Marketplace associates GL account numbers (or Ellucian’s Colleague shortcuts) with products, taxes, and delivery methods.

**Note:** Ellucian’s Colleague shortcuts are groups of GL account numbers with percentages assigned to each GL account number in the group so that transactions are split into multiple GL account numbers according to a prescribed allocation plan. (Transactions can be split among multiple GL account numbers or 100% can be assigned to a single GL account number.)

Tender GL distribution codes are assigned during the store setup process. Once a tender GL distribution code is assigned to a store, this value will be reported to Ellucian’s Colleague for each store transaction. No validation process takes place when the tender GL distribution code is entered in Marketplace. Merchant managers are responsible for making sure they enter valid tender GL distribution codes.

**Note:** Typically the tender GL distribution code represents the debit account number of a double entry GL transaction reporting revenue. The general ledger account number or Ellucian’s Colleague shortcut entered as the store default accounting code, or override account entered at the
product level, represents the credit account number of this same double entry GL transaction.

Before GL account numbers (or Ellucian’s Colleague shortcuts) can be associated with products, taxes, or delivery methods, a Marketplace administrator or merchant manager must enter these values into Marketplace using Marketplace’s "Accounting Codes" functionality. As each GL account number (or Ellucian’s Colleague shortcut) is entered in Marketplace it is validated with Ellucian’s Colleague. (For Ellucian’s Colleague shortcuts, Ellucian’s Colleague returns a list of the associated GL account numbers and the distribution percentages. This information is then stored in Marketplace for all subsequent related transactions.)

Once GL account numbers (or Ellucian’s Colleague shortcuts) have been entered into Marketplace, these numbers/codes can be associated with products, taxes, and delivery methods.

**Important!** Contact your Ellucian’s Colleague general ledger administrator for a list of the approved Ellucian’s Colleague accounting codes that can be used with Marketplace. Likewise, contact the Ellucian’s Colleague administrator if a new Ellucian’s Colleague accounting code is required.

---

**About PeopleSoft Accounting Codes**

For PeopleSoft Enterprise Financials general ledger reporting, Marketplace accounting codes are tied to SpeedType and business unit codes.

Each accounting code is associated with a SpeedType code and a business unit code. During the accounting code setup process, Marketplace forwards the SpeedType code and business unit entries to PeopleSoft Connect, which in turn communicates with PeopleSoft Enterprise Financials to verify that the SpeedType code and business unit entries are valid. If the entries are not valid, the user is immediately notified and not allowed to save the accounting code until a valid SpeedType and business unit code have been entered.

When Marketplace stores or uPay sites use general ledger functionality, the associated SpeedType and business unit codes are passed to the PeopleSoft Enterprise Financials system. For products that do not require fulfillment, the SpeedType and business unit codes are passed at the conclusion of the order entry process. For products that require fulfillment, the SpeedType and business unit codes are passed during the fulfillment process.

**Important!** Before a Marketplace accounting code can be established you must ensure a SpeedType and a business unit code have been created that can be associated with the Marketplace accounting code. Contact your general ledger administrator for a list of the approved SpeedType and business unit codes. Likewise, contact the general ledger administrator if a new SpeedType or business unit code is required.
13.2  About Cashier IDs (Banner by Ellucian only)

The Banner general ledger system use cashier IDs. These IDs can be used for identifying Marketplace transactions to Banner by Ellucian.

A default cashier ID is assigned by the Marketplace administrator (see "Configuring System Administration Settings" on page 450) and can apply to all the Marketplace stores. However, each store can also have its own cashier ID. If a merchant manager assigns a cashier ID to a store (see "Configuring Store Settings" on page 460), this value overrides the default cashier ID.

You should contact your Banner by Ellucian administrator for information about how cashier IDs should be used.
14.0 Configuring General Ledger Integration

General ledger integration typically involves configuring Payment Gateway and editing Marketplace properties files. In addition, general ledger integration requires using Marketplace Operations Center to establish accounting codes and configure various settings.

Note: The integration steps for configuring Payment Gateway and editing Marketplace properties files are described in general-ledger-specific support references. Banner by Ellucian customers should use the following guide: Banner by Ellucian Setup Guide for Marketplace. PeopleSoft customers should use the PeopleSoft Setup Guide for Marketplace. And Ellucian’s Colleague customers should use the Ellucian’s Colleague Setup Guide for Marketplace. Only the configuration steps that involve using Marketplace Operations Center are described in the following sections.

Steps for General Ledger Integration

The following steps describe how to use the Marketplace Operations Center to establish general ledger integration. These steps can only be performed after Payment Gateway has been configured and Marketplace properties files have been edited.

1. A Marketplace administrator creates common accounting codes, typically used for tax classes. See "Configuring System Administration Settings" on page 450.


   Note: Banner by Ellucian users must also enter a default cashier ID for use by all Marketplace stores.

3. If applicable, a merchant manager selects which common accounting codes will be used by the associated merchant. See "Configuration Setting: Enabling Common Accounting Codes" on page 455.

4. For each Marketplace merchant, a merchant manager adds new accounting codes. These codes include 1) store default accounting codes, 2) uPay site accounting codes, 3) override accounting codes to be used by products, and 4) override accounting codes for delivery methods. See "Configuring Merchant Settings" on page 455.

5. For each Marketplace store and uPay site, a merchant manager or store manager turns on general ledger functionality and selects the default accounting code for the store. See "Configuring Merchant Settings" on page 455 and "Configuring uPay Settings" on page 465.
For each Marketplace store, a store manager assigns override accounting codes to products. See “Configuration Setting: Selecting an Accounting Code Override” on page 461.

For each Marketplace store, a store manager assigns override accounting codes to delivery methods. See “Configuration Setting: Establishing Shipping Classes” on page 462.

**Note:** Banner by Ellucian users can enter a cashier ID for each store. And Ellucian’s Colleague users can enter a Tender GL Dist Code for each store.

### 14.1 Configuring System Administration Settings

In the system administration settings of the Marketplace Operations Center, a Marketplace administrator can create and edit accounting codes that will be available for all the stores to use. These accounting codes are called “common” accounting codes. In the system administration settings, a Marketplace administrator can also assign accounting codes to tax classes.

**Note:** In addition to the system administration settings described below, Banner by Ellucian customers must also enter a default cashier ID.

Here are descriptions of how to change the system administration settings that affect general ledger functionality.

<table>
<thead>
<tr>
<th>Configuration Setting</th>
<th>Description</th>
<th>Left Navigation Menu</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adding Common Accounting Codes</td>
<td>Marketplace administrators can set up common accounting codes for use by Marketplace stores.</td>
<td>Marketplace Home &gt; System Administration &gt; Settings &gt; Accounting Codes.</td>
<td>Displays the uStores Common Accounting Codes page.</td>
</tr>
</tbody>
</table>
**Configuration Setting:** Adding Common Accounting Codes

**Description:** Marketplace administrators can set up common accounting codes for use by Marketplace stores.

**Actions:** The uStores Common Accounting Codes page lists all the common accounting codes that have currently been established.

To add a new accounting code, select the Add Common Accounting Code link, which displays the Add New Common Accounting Code page (see the screen capture below).

**Note:** The Add New Common Accounting Code page contains additional fields if general ledger functionality for Banner by Ellucian, PeopleSoft, or Ellucian's Colleague has been activated. Banner by Ellucian customers should view "Configuration Setting for Banner: Adding Common Accounting Codes" on page 453, PeopleSoft customers should view "Configuration Setting for PeopleSoft: Adding Common Accounting Codes", and Ellucian's Colleague customers should view "Ellucian's Colleague System Administration Settings" on page 453.

When you establish a common accounting code, you must give it a name. Enter the name in the New Accounting Code Name field (25 characters maximum). The name you assign must be unique. Names already used are displayed in the lower half of the Add New Common Accounting Code page.

![Add New Common Accounting Code page](image)

**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 uStores Tax Account Codes page.
**Configuration Setting: Establishing Tax Account Codes**

Description: Marketplace administrators can link accounting codes to tax classes, and these tax classes can be used for all Marketplace stores.

**Actions:** This page lists three tax classes: no tax, default tax rate, and higher tax rate.

You can assign an accounting code to each tax class by choosing from the Accounting Code dropdown menus.

If no accounting codes are assigned to the tax classes, then each store reports tax revenue using its own default accounting code.

---

**Banner System Administration Settings**

For Banner by Ellucian customers, some of the Marketplaces Operations Center pages are customized for Banner by Ellucian integration. As a result, the field name Banner Detail Code replaces some instances of Accounting Code. In addition, fields for recording cashier ID values also appear.

The following tables describe those system administration settings which affect only Banner by Ellucian integration.

**Configuration Setting for Banner: Enter a Default Cashier ID**

**Description:** Marketplace administrators can set up a default cashier ID available for all Marketplace stores.

**Left Navigation Menu:** Marketplace Home > System Administration > Settings > General.

**Page:** Displays the General System 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 and can be used to help identify the Marketplace store from which a transaction originated.
Configuration Setting for Banner: 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 uStores Common Accounting Codes page.

Actions: The uStores Common Accounting Codes page lists all the common accounting codes that have currently been established for use by Marketplace stores.

To add a new accounting code, select the Add New Common Accounting Code link, which displays the Add New Common Accounting Code page (see the screen capture below). 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 lower half of the Add New Common Accounting Code page.

Ellucian’s Colleague System Administration Settings

For Ellucian’s Colleague customers, some of the Marketplace Operations Center pages are customized for Ellucian’s Colleague integration. As a result, the field name Ellucian’s Colleague Code replaces some instances of Accounting Code.

The following table describe those system administration settings which affect only Ellucian’s Colleague integration.
**Configuration Setting for Ellucian’s Colleague: 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 uStores Common Accounting Codes page.

**Actions:** The uStores Common Accounting Codes page lists all the common accounting codes that have currently been established for use by Marketplace stores.

To add a new accounting code, select the Add New Common Accounting Code link, which displays the Add New Common Accounting Code page (see the screen capture below). Enter an approved Ellucian’s Colleague GL account number or Ellucian’s Colleague shortcut in the Ellucian’s Colleague Code field. (You will need to contact your institution’s Ellucian’s Colleague administrator for a list of the approved general ledger codes.) Ellucian’s Colleague codes that have already been added are displayed in the lower half of the Add New Common Accounting Code page.

![Add New Common Accounting Code](image)

**PeopleSoft System Administration Settings**

For PeopleSoft customers, some of the Marketplace Operations Center pages are customized for PeopleSoft integration. As a result, the field names SpeedType Code and Business Unit appear when you create new accounting codes.

The following table describe those system administration settings which affect PeopleSoft integration.
14.2 Configuring Merchant Settings

Before a store or uPay site can use a common accounting code, the code must first be "enabled" by the store’s merchant manager. In addition to enabling existing common accounting codes, a merchant manager can establish new accounting codes. In contrast to common accounting codes, however, an accounting code established by a merchant manager is available for use only by the merchant who established the code.

**Configuration Setting**: Enabling Common Accounting Codes

**Description**: A Marketplace merchant manager can select which common accounting codes are available for use by the merchant’s stores and uPay sites.


**Page**: Displays the Marketplace Merchant Accounting Codes page.

**Actions**: The Marketplace Merchant Accounting Codes page lists the common accounting codes that are available for use by the merchant. By selecting accounting codes in the selection list box and clicking Add, you can add accounting codes to the Enabled Common Accounting Codes list. Once you enable a common accounting code, it is then available for use by the merchant’s stores and uPay sites.

**Configuration Setting**: Adding New Accounting Codes

**Description**: A Marketplace manager can add new accounting codes to be used by the merchant’s stores and uPay sites.

**Configuration Setting:** Adding New Accounting Codes  
**Description:** A Marketplace manager can add new accounting codes to be used by the merchant’s stores and uPay sites.

**Page:** Displays the Marketplace Merchant Accounting Codes page.

**Actions:** The top portion of the Marketplace Merchant Accounting Codes page (see the screen capture on the previous page) lists the common accounting codes that are available for use by the merchant, while the bottom portion lists all the new accounting codes that have currently been established.

To add a new accounting code, select the Add A New Accounting Code link, which displays the Add A New Accounting Code page (see the screen capture below).

**Note:** This page contains additional fields if general ledger functionality for Banner by Ellucian, PeopleSoft, or Ellucian's Colleague has been activated. Banner by Ellucian customers should view “Configuration Setting for Banner: Add New Accounting codes” on page 457, PeopleSoft customers should view "Configuration Setting for PeopleSoft: Adding New Accounting Codes", and Ellucian’s Colleague customers should view "Ellucian’s Colleague Merchant Settings" on page 458.

When you establish a new accounting code, you must give it a name. Enter the name in the New Accounting Code Name field (25 characters maximum). The name you assign must be unique. Names already used are displayed in the lower half of the Add A New Common Accounting Code page.

**Configuration Setting:** Establishing Tax Account Codes  
**Description:** Marketplace merchant managers can link accounting codes to tax classes at the merchant level. These tax classes are then available for use by the merchant’s stores.

**Left Navigation Menu:** Marketplace Home > [merchant] > Tax Account Codes.

**Page:** Displays the Merchant Tax Account Codes page.
**Configuration Setting**: Establishing Tax Account Codes  
**Description**: Marketplace merchant managers can link accounting codes to tax classes at the merchant level. These tax classes are then available for use by the merchant’s stores.

**Actions**: This page lists three tax classes: no tax, default tax rate, and higher tax rate.  
You can assign an accounting code to each tax class by choosing from the Accounting Code dropdown menus.  
If no accounting codes are assigned to the tax classes, then each store reports tax revenue using its own default accounting code.

---

**Banner Merchant Settings**

For Banner by Ellucian customers, some of the Marketplaces Operations Center pages are customized for Banner by Ellucian integration.  
The following table describes those merchant settings which affect Banner by Ellucian integration.

<table>
<thead>
<tr>
<th>Configuration Setting for Banner: Add New Accounting codes</th>
<th>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.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Page</strong>: Displays the Marketplace Merchant Accounting Codes page.</td>
<td></td>
</tr>
</tbody>
</table>
### Configuration Setting for Banner: Add New Accounting codes

**Description:** A Marketplace manager can add new accounting codes to be used by the merchant's stores and uPay sites and associate these accounting codes with Banner Detail Codes.

**Actions:** The top portion of the Marketplace Merchant Accounting Codes page (see the screen capture on the previous page) lists the common accounting codes that are available for use by the merchant, while the bottom portion lists all the new accounting codes that have currently been established.

To add a new accounting code, select the Add A New Accounting Code link, which displays the Add A New Accounting Code page (see the screen capture below). Enter an approved Banner detail code in the Banner Detail Code field. (You will need to contact your institution's Banner 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 lower half of this page.

### Ellucian's Colleague Merchant Settings

For Ellucian's Colleague customers, some of the Marketplaces Operations Center pages are customized for Ellucian's Colleague integration.

The following table describes those merchant settings which affect Ellucian's Colleague integration.

<table>
<thead>
<tr>
<th>Configuration Setting for Ellucian's Colleague: Add New Accounting codes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description:</strong> A Marketplace manager can add new Ellucian's Colleague accounting codes to be used by the merchant's stores, products, taxes, delivery methods, and uPay sites.</td>
</tr>
<tr>
<td><strong>Left Navigation Menu:</strong> Marketplace Home &gt; [merchant] &gt; Accounting Codes.</td>
</tr>
<tr>
<td><strong>Page:</strong> Displays the Marketplace Merchant Accounting Codes page.</td>
</tr>
</tbody>
</table>
**Configuration Setting for Ellucian’s Colleague: Add New Accounting codes**

**Description:** A Marketplace manager can add new Ellucian’s Colleague accounting codes to be used by the merchant’s stores, products, taxes, delivery methods, and uPay sites.

**Actions:** The top portion of the Marketplace Merchant Accounting Codes page (see the screen capture on the previous page) lists the common accounting codes that are available for use by the merchant, while the bottom portion lists all the new accounting codes that have currently been established.

To add a new accounting code, select the Add A New Accounting Code link, which displays the Add A New Accounting Code page (see the screen capture below). Enter an approved Ellucian’s Colleague accounting code in the Ellucian’s Colleague Code field. You can enter either a GL account code or a Ellucian’s Colleague shortcut. (You will need to contact your institution’s Ellucian’s Colleague administrator for a list of the approved codes.) Accounting codes already entered for use by the merchant are displayed in the lower half of this page.

---

**Ellucian’s Colleague Merchant Settings**

For PeopleSoft customers, some of the Marketplace Operations Center pages are customized for PeopleSoft integration.

The following table describes those merchant settings which affect PeopleSoft integration.

**Configuration Setting for Ellucian’s Colleague: Add New Accounting codes**

**Description:** A Marketplace manager can add new Ellucian’s Colleague accounting codes to be used by the merchant’s stores, products, taxes, delivery methods, and uPay sites.

**Left Navigation Menu:** Marketplace Home > [merchant] > Accounting Codes.
**Configuration Setting for Ellucian’s Colleague: Add New Accounting codes**

**Description:** A Marketplace manager can add new Ellucian’s Colleague accounting codes to be used by the merchant’s stores, products, taxes, delivery methods, and uPay sites.

**Page:** Displays the Marketplace Merchant Accounting Codes page.

**Actions:** The top portion of the Marketplace Merchant Accounting Codes page lists the common accounting codes that are available for use by the merchant, while the bottom portion lists all the new accounting codes that have currently been established.

To add a new accounting code, select the Add A New Accounting Code link, which displays the Add A New Accounting Code page. Enter an approved Ellucian’s Colleague accounting code in the Ellucian’s Colleague Code field. You can enter either a GL account code or an Ellucian’s Colleague shortcut. (You will need to contact your institution’s Ellucian’s Colleague administrator for a list of the approved codes.) Accounting codes already entered for use by the merchant are displayed in the lower half of this page.

14.3 Configuring Store Settings

Before general ledger codes are reported with transactions, a merchant manager or store manager must turn on the Perform General Ledger Updates option. This option is located in the store settings. In addition, a merchant manager can select the default accounting code to use with a store.

A store manager can select an accounting code override to use with a product, which if selected, overrides a store’s default accounting code. In addition, a store manager can select the accounting code to use with special delivery methods in a shipping class.
### Configuration Setting: Turning On General Ledger Functionality

**Description:** A Marketplace merchant manager or store manager can turn on general ledger functionality and select a default accounting code to be used for transactions at a store.


**Page:** Displays the [Store Name] General Settings page.

**Actions:** To turn on general ledger functionality for a store, select the checkbox for Perform General Ledger Updates.

If you turn on general ledger functionality, you must also select a Default Accounting Code from the dropdown menu. The accounting code you select will be used for all products in a store except those products for which you establish an override accounting code. The accounting codes displayed in the dropdown menu represent both the common accounting codes that have been enabled and the new accounting codes established by a merchant manager.

Note: For Banner by Ellucian customers, an additional field appears on the General Settings page. See "Banner Stores Settings" on page 463.

---

### Configuration Setting: Selecting an Accounting Code Override

**Description:** A Marketplace store manager can assign an accounting code override to a product.


**Page:** Displays the [Store Name] Product Management page.
### Configuration Setting: Selecting an Accounting Code Override

**Description:** A Marketplace store manager can assign an accounting code override to a product.

**Actions:** For existing products, use the Choose Other Category dropdown menu on the [Store Name] Product Management page to select the category that contains the product you wish to edit. The products for this category are then displayed.

Click a product name to display the associated [Store Name] Product Details page (see the screen capture below). The store’s default accounting code will be used unless you have selected an accounting code override. To use an override, select an accounting code from the Accounting Code Override dropdown menu.

Typically, stores will use the same override accounting code for groups of related products. For example, all clothing items or all books might receive the same override account code.

You can also establish an accounting code override when you add a new product. Select the Add a New Product link on the [Store Name] Product Management page, which starts the Add a New Product Wizard. Step 2 of the wizard displays the Accounting Code Override dropdown menu. You can either use the store’s default accounting code or select an override code from the Accounting Code Override dropdown menu.

You can also set an accounting code override when importing a product list. For more information, see "Importing Product Lists" on page 244.

<table>
<thead>
<tr>
<th>Store's Default Accounting Code</th>
<th>General Account</th>
<th>Override Default Accounting Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Value 1]</td>
<td>[Value 2]</td>
<td>[Value 3]</td>
</tr>
</tbody>
</table>

### Configuration Setting: Establishing Shipping Classes

**Description:** A Marketplace store manager can associate an accounting code with a delivery method in a shipping class.

**Left Navigation Menu:** Marketplace Home > [Merchant] > Stores > [Store Name] > Store Settings > Shipping Classes.

**Page:** Displays the [Store Name] Shipping Classes page.
Configuration Setting: Establishing Shipping Classes

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.

You can also select a Tax Class for each shipping rate. Tax classes are linked to accounting codes as described in "Configuring System Administration Settings" on page 450.

Configuration Setting: Establishing Tax Account Codes

Description: Marketplace store managers can link accounting codes to tax classes for individual stores.


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 Override dropdown menus.

If no accounting codes are assigned to the tax classes, then each store reports tax revenue using its own default accounting code.

Banner Stores Settings

For Banner by Ellucian customers, some of the Marketplaces Operations Center pages are customized for Banner by Ellucian integration.
The following table describes those store settings which affect Banner by Ellucian integration.

<table>
<thead>
<tr>
<th>Banner Configuration Setting: Select Cashier ID for a Store</th>
<th>Description: A Marketplace merchant manager or store manager can enter a Cashier ID for a store.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Actions</strong>: Enter a cashier ID in the Cashier ID field. The value you enter in this field overrides the cashier ID you entered on the System Administration General Settings page.</td>
<td></td>
</tr>
</tbody>
</table>

For Ellucian's Colleague customers, some of the Marketplaces Operations Center pages are customized for Ellucian's Colleague integration.

The following table describes those store settings which affect Ellucian's Colleague integration.

<table>
<thead>
<tr>
<th>Ellucian's Colleague Configuration Setting: Select Tender GL Distribution Code for a Store</th>
<th>Description: A Marketplace merchant manager or store manager can enter a Tender GL Distribution Code for a store.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Actions</strong>: Enter a tender GL distribution code in the Tender GL Dist Code field. This code will be reported to Ellucian's Colleague for all transactions for this store.</td>
<td></td>
</tr>
</tbody>
</table>
14.4 Configuring uPay Settings

In order for general ledger codes to be reported with uPay transactions, a merchant manager must turn on the Perform General Ledger Updates option. This option is located in the payment settings for each uPay site. Once this option is selected for a uPay site, an accounting code must be chosen for the site. (Banner by Ellucian users must also enter a cashier ID, and Ellucian's Colleague users must also enter a tender GL distribution code.) 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 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 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.

14.5 Maintaining Accounting Codes

If a general ledger code changes that is used by a Marketplace accounting code, you must edit the accounting code so that it uses the new value for the general ledger code.
**Configuration Setting to Maintain:** Common Accounting Codes

**Description:** Marketplace administrators can edit and delete common accounting codes.

**Left Navigation Menu:** Marketplace Home > System Administration > Settings > Accounting Codes.

**Page:** Displays the uStores Common Accounting Codes page.

**Actions:** To edit an accounting code, select the corresponding Edit link in the Actions column. The Edit Common Accounting Code page appears. Here, you can enter a new value in the Accounting Code field. Banner by Ellucian customers will also see the Banner Detail Code field. Ellucian's Colleague customers will see the Ellucian's Colleague Code field in lieu of the Accounting Code field. And PeopleSoft customers will see multiple general ledger fields in addition to the Accounting Code field. The Delete link on the UStores Common Accounting Codes page is only active for accounting codes that are not currently in use, and the Show Merchant Accounting Codes link can be used to view a list of all the accounting codes (both common and merchant-specific) that have been established throughout your institution’s implementation of Marketplace.

**Configuration Setting to Maintain:** Merchant Accounting Codes

**Description:** Merchant managers can enable existing common accounting codes and edit merchant-specific accounting codes.

**Left Navigation Menu:** Marketplace Home > [Merchant] > Accounting Codes.

**Page:** Displays the Marketplace Merchant Accounting Codes page.
Configuration Setting to Maintain: Merchant Accounting Codes

Description: Merchant managers can enable existing common accounting codes and edit merchant-specific accounting codes.

Actions: By selecting accounting codes in the selection list box and clicking Add, you can add accounting codes to the Enabled Common Accounting Codes list. Once you enable a common accounting code, it is then available for use by the merchant’s store. 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.
15.0 General Ledger Exceptions

When orders are fulfilled and when uPay payments are accepted, Marketplace transfers revenue data into the general ledger system. General ledger exceptions occur when data (such as accounting codes) is incorrect, missing, or fails to transfer. When this happens, the fulfiller will see exception messages, and the store manager will see the Fix General Exceptions task on the home page.

**Important!** A general ledger exception does not mean a fulfillment has failed. It means only that data could not be transferred to the general ledger system. If you see an exception while processing refunds, do not assume the refund was not processed. Scroll to the bottom of the Fulfillment Details screen to see whether the refund was successfully processed.

Shipping charge exceptions or shipping charge tax exceptions indicate errors related to shipping class setup. Item charge tax exceptions indicate errors related to tax class setup.

General ledger exceptions fall into two main categories:

- "Being processed" and "Unknown" exceptions. These indicate problems in data transmission.
- All other exceptions. Any other exception indicates incorrect or missing data.

15.1 Fixing a General Ledger Exception

**Note:** Only store managers and merchant managers of the store can fix general ledger exceptions.

Follow these steps to fix a general ledger exception.

1. In the left navigation menu, select Marketplace Home > Marketplace Reports > uPay Sites > [merchant] > [uPay site] > GL Exception Report.

   **Note:** The number in parenthesis following "GL Exception Report" indicates the number of orders with GL exceptions.

2. Review orders where exceptions occurred.

3. Correct data as needed and resubmit, or verify that data was correctly transferred to the general ledger system.

4. Click the Send button.
15.2 Fixing Exceptions Caused By Incorrect Data

The exceptions in the following table indicate that data was incorrect or missing. You must enter the correct data in your Marketplace setup, then resubmit the order for processing to the general ledger.

For these exceptions, correct general ledger codes as needed. Then, mark the Resubmit for Processing option and click the Process Update button. This will resubmit the data for transfer. It has no effect on orders or fulfillments.

### Exceptions Caused by Incorrect Data

<table>
<thead>
<tr>
<th>Exception Message</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>(blank message)</td>
<td>Transaction was not submitted to the general ledger system. This typically occurs when the administrator has disabled general ledger options for Marketplace. Enable the general ledger options.</td>
</tr>
<tr>
<td>Missing Data</td>
<td>Data is missing from accounting code fields. The store manager must enter the required information (or the administrator must correct the tax account codes).</td>
</tr>
<tr>
<td>Cashier Not Found in [table]</td>
<td>Cashier ID is missing from the site setup. The administrator must enter the default store cashier ID.</td>
</tr>
<tr>
<td>Pay Detail Code Not Found in [table] or Charge Detail Code Not Found in [table]</td>
<td>Invalid data was sent; the codes do not exist in the general ledger system. Data must be correct in all fields required for general ledger entry (product, shipping class, tax account, or store cashier ID).</td>
</tr>
<tr>
<td>Resubmit - Database error prevented further processing</td>
<td>May indicate the database was not available. Resubmit the order for processing.</td>
</tr>
</tbody>
</table>

15.3 Fixing Exceptions Caused by Data Transmission

The two exception messages Being Processed or Unknown occur when data was sent to the general ledger system but no response could be determined. The data may be in the general ledger system correctly.
First, investigate whether the data was received by the general ledger system. Store managers may need to ask fulfillers for specific order information to track this revenue.

If the data was not received correctly, attempt to resubmit for processing. If it was received correctly, mark the order as completed.

If the exception type is "Being Processed" or "Unknown," verify that its revenue has been transferred to the general ledger system. If yes, select the Mark as Completed option. If no, select the Resubmit for Processing option.

**Important!** Never mark an order as completed unless you have verified that its revenue was transferred to the general ledger system.
Part 7: Marketplace Reports
16.0  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.

16.1  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.

![Screenshot of Marketplace Reports menu]

These four submenus contain the following report selections:

<table>
<thead>
<tr>
<th>Report Submenu</th>
<th>Available Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketplace</td>
<td>Revenue by Merchant</td>
</tr>
<tr>
<td></td>
<td>Revenue by Accounting Code</td>
</tr>
<tr>
<td></td>
<td>Taxes</td>
</tr>
<tr>
<td>Merchants</td>
<td>Merchant Revenue Report</td>
</tr>
<tr>
<td></td>
<td>Taxes</td>
</tr>
<tr>
<td>Stores</td>
<td>[Store Revenue Report] By Product</td>
</tr>
<tr>
<td></td>
<td>[Store Revenue Report] By Product Type</td>
</tr>
<tr>
<td></td>
<td>[Store Revenue Report] Totals</td>
</tr>
<tr>
<td></td>
<td>Taxes</td>
</tr>
<tr>
<td></td>
<td>Buyer Information</td>
</tr>
<tr>
<td></td>
<td>Recurring Payments</td>
</tr>
<tr>
<td></td>
<td>GL Exceptions</td>
</tr>
</tbody>
</table>
16.2 Report Types by User Role

The available reports depend on your user roles.

<table>
<thead>
<tr>
<th>If you have this Role...</th>
<th>You see these Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator, chief administrator, or accountant</td>
<td>Revenue by Merchant (the top-level Marketplace report) Revenue by Accounting Code Tax Report</td>
</tr>
<tr>
<td>Merchant manager</td>
<td>Merchant Revenue Report All store reports All uPay site reports</td>
</tr>
<tr>
<td>uPay site manager and uPay site accountant</td>
<td>Revenue By Product Recurring Payments Posting Status GL Exceptions</td>
</tr>
</tbody>
</table>

16.3 Administrative Reports

Several reports are available that summarize Marketplace commerce activity for administrative users and accountants.

You can customize each report by changing the date criteria. To search by a specific date range, enter a new start date and end date. You can either
enter the date that you desire or use the calendar button to select a date. If you enter a new start or end in the date fields, be sure to enter the dates in mm/dd/yy format.

You can export—in CSV format—the activity displayed in Marketplace reports. Each report has an Export to CSV button. When you click this button, you'll be prompted to select a location for saving the CSV file.

Revenue by Merchant Report

Administrators, chief administrators, and accountants can open the top-level merchant report.

It shows a summary of activity by merchant for all stores and uPay sites in your Marketplace system.

And here is the same report with one of the merchants expanded to show store and uPay site transaction details.
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.

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.

16.4 Merchant Reports

Several reports are available that summarize Marketplace commerce activity for merchant managers.

You can customize each report by changing the date criteria. To search by a specific date range, enter a new start date and end date. You can either enter the date that you desire or use the calendar button to select a date. If you enter a new start or end in the date fields, be sure to enter the dates in mm/dd/yy format.

You can export—in CSV format—the activity displayed in Marketplace reports. Each report has an Export to CSV button. When you click this button, you’ll be prompted to select a location for saving the CSV file.

Merchant Revenue Report

Merchant managers can view the Merchant Revenue Report. This report shows transaction totals for a merchant, as well as totals for each store and uPay site that have been established for that merchant.
Merchant Tax Report

Merchant managers can view the Merchant Tax Report. This report shows a summary of activity by accounting code for all stores and uPay sites for a single merchant. The report can be displayed with or without the Accounting Code column.

Tax Report

You can use the Include/Exclude Account Codes dropdown menu to determine whether the Accounting Code column will be displayed.
16.5 Store Reports

Several reports are available that summarize Marketplace commerce activity for merchant managers, store managers, and store accountants.

You can customize each report by changing the date criteria. To search by a specific date range, enter a new start date and end date. You can either enter the date that you desire or use the calendar button to select a date. If you enter a new start or end in the date fields, be sure to enter the dates in mm/dd/yy format.

You can export—in CSV format—the activity displayed in Marketplace reports. Each report has an Export to CSV button. When you click this button, you’ll be prompted to select a location for saving the CSV file.

Store Revenue Report by Product

The Store Revenue Report can be displayed by product, stock number, product type (generic, donation, or digital), and totals. This report and its four varieties are available for a store’s store managers and merchant managers, as well as store accountants.

When displayed by Product, the report lists all the products that have sold during the displayed date range. You can change the date range as required.

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 482.

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 482.

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.

Store Revenue Report by Product Type

The Store Revenue Report by Product Type shows the total amount paid and the number sold for each product type. The following three product types are displayed: donation, digital, and generic.
**Store Revenue Report by Totals**

The Store Revenue Report by Totals shows total amounts collected for fulfillments and items sold.

![Store Revenue Report](image)

**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.

![Store Tax Report](image)

You can use the Include/Exclude Account Codes dropdown menu to determine whether the Accounting Code column will be displayed.

**Buyer Information Report**

The Buyer Information Report shows transactions by Order ID, Purchaser, Date Ordered, and Payment Method for all orders within a selected time period.
The Recurring Payment Group Report contains two tables. The table at the top of the report shows totals for all recurring payments that were processed during the selected date range. The second table shows all recurring payment schedules for which payments were processed during the selected date range.

The Installments column shows the number of payments that were processed for each recurring payment schedule. For example, if this column shows "3 of 13," this means three recurring payments were processed during the selected date range, and the recurring payment schedule includes a total of 13 payments.

You can view additional information on recurring payments on the Store Recurring Payment Detail Report by clicking the System Tracking ID number.
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").
In this case, assume the above screen shot was captured on 12/14/2011. Therefore, installment 580 on 12/14/11 has been processed and shows a status of "Success," while installments 581 through 587 are scheduled for future dates and show a status of "Not Processed."

**GL Exception Report**

If your Marketplace site is using general ledger reporting, general ledger exceptions occur when data (such as accounting codes) are incorrect or missing or otherwise fail to transfer into the general ledger system. These exceptions are grouped in the Marketplace GL Exception Report. The Marketplace GL Exception Report shows all transactions that failed to transfer data into the general ledger system. By clicking the View link in the Action column, you can view detailed information for a specific exception.

<table>
<thead>
<tr>
<th>Order ID</th>
<th>Message(s)</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>128</td>
<td>Error - invalid reverse stream marketplace configuration (9500 123456)</td>
<td>View</td>
</tr>
<tr>
<td>166</td>
<td>Re-submit - transaction communication error (-23) prevented processing</td>
<td>View</td>
</tr>
<tr>
<td>168</td>
<td>Re-submit - transaction communication error (-23) prevented processing</td>
<td>View</td>
</tr>
<tr>
<td>174</td>
<td>Re-submit - transaction communication error (-23) prevented processing</td>
<td>View</td>
</tr>
<tr>
<td>176</td>
<td>Error - credit detail code is invalid: SHIP Error - credit detail code is invalid: WAC</td>
<td>View</td>
</tr>
<tr>
<td>177</td>
<td>Error - credit detail code is invalid: SHIP</td>
<td>View</td>
</tr>
</tbody>
</table>

The exception detail page allows you to edit the cashier ID and the accounting codes and then re-submit the transaction information to the general ledger system (or to simply mark the transaction information as completed).
Important! Never mark an order as complete unless you are sure its revenue has been transferred successfully to the general ledger system. Otherwise, resubmit the data for processing.

16.6 uPay Site Reports

Several reports are available that summarize Marketplace commerce activity for merchant managers, uPay site managers, and uPay site accountants.
You can customize each report by changing the date criteria. To search by a specific date range, enter a new start date and end date. You can either enter the date that you desire or use the calendar button to select a date. If you enter a new start or end in the date fields, be sure to enter the dates in mm/dd/yy format.

You can export—in CSV format—the activity displayed in Marketplace reports. Each report has an Export to CSV button. When you click this button, you’ll be prompted to select a location for saving the CSV file.

**uPay Revenue Report**

The uPay Revenue report is available for a uPay site’s site managers, merchant managers, and store accountants.

**Note:** Recurring payments appear as revenue on the day the payments are processed. For example, if a recurring payment is set for December 1, the payment will be displayed as revenue on December 1.

The payment information in this report can be exported by using the "Export to CSV" button.

You can determine how many transactions will appear on each page of the Revenue Report by using the "Number of rows per page" field.

<table>
<thead>
<tr>
<th>uPay Revenue Report</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>The uPay Revenue report is available for a uPay site’s site managers, merchant managers, and store accountants.</td>
</tr>
<tr>
<td><strong>Note:</strong> 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.</td>
</tr>
<tr>
<td>The payment information in this report can be exported by using the &quot;Export to CSV&quot; button.</td>
</tr>
<tr>
<td>You can determine how many transactions will appear on each page of the Revenue Report by using the &quot;Number of rows per page&quot; field.</td>
</tr>
</tbody>
</table>
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.
The Product Detail Report shows the transactions for the selected date range.

The order information on this report represents all the transactions for the selected product for the selected date range. The report shows the order ID, purchases name, date ordered, payment method, and total amount paid for each transaction.

By selecting the Show/Hide Product Detail button to show/hide the e-mail address of the customer/purchaser.

The payment information in this report can be exported by using the "Export to CSV" button.

The uPay Recurring Payment Group Report contains two tables. The table at the top of the report shows totals for all recurring payments that were processed during the selected date range. The second table shows all recurring payment schedules for which payments were processed during the selected date range.

The Installments column shows the number of payments that were processed for each recurring payment schedule. For example, if this column shows "3 of 13," this means three recurring payments were processed during the selected date range, and the recurring payment schedule includes a total of 13 payments.
You can view additional information on a payment plan on the uPay Recurring Payment Detail Report by clicking the System Tracking ID number.

On the Detail Report, you can view scheduled plan payments by selecting a future date range that includes the scheduled payments. The Status column shows payments that have been processed ("Success") and payments that are scheduled to be processed in the future ("Not Processed").
In this case, assume the above screen shot was captured on 12/12/2011. Therefore, installment 15 on 12/6/11 has been processed and shows a status of "Success," while installments 16 through 27 are scheduled for future dates and show a status of "Not Processed."

**uPay Posting Status Report**

uPay sites that use a posting URL also have a Posting Status Report. The uPay site’s site manager, merchant manager, or store accountant can see the site’s Posting Status report.

The payment information in this report can be exported by using the "Export to CSV" button.

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.

If your Marketplace site is using general ledger reporting, general ledger exceptions occur when data (such as accounting codes) are incorrect or missing or otherwise fail to transfer into the general ledger system. These exceptions are grouped in the Marketplace GL Exception Report. The Marketplace GL Exception Report shows all transactions that failed to transfer data into the general ledger system. By clicking the View link in the Action column, you can view detailed information on the Order Information report for a specific exception.
The exception detail page for a selected exception allows you to edit the Accounting Code and then re-submit the transaction information to the general ledger system (or to simply mark the transaction information as completed).

**Important!** Never mark an order as complete unless you are sure its revenue has been transferred successfully to the general ledger system. Otherwise, resubmit the data for processing.
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