

# Setting up your TouchNet Marketplace uStore

The screenshot shows the top navigation bar with the University of Washington logo and name on the left, and search, user profile, and cart icons on the right. Below the navigation is a large banner image of a university campus with a fountain and buildings. Underneath the banner is the heading "Welcome to University of Washington Test Marketplace".

**Merchant Services**  
[Merchant Services](#), a division of Financial Accounting, is tasked with the oversight of payment card acceptance within the University. This includes the implementation and management of this TouchNet Marketplace.

**TouchNet Testing**  
This site is the Test site for the UW TouchNet Marketplace. Please be aware that stores and products in this Marketplace are at all stages of development. For inquiries into becoming part of the marketplace, contact Merchant Services at [pchhelp@uw.edu](mailto:pchhelp@uw.edu)

The bottom navigation bar includes "All Stores", "Store Categories" (with a dropdown menu), and "Product Categories". The dropdown menu lists: University of Washington, UW Medicine, UW Tacoma, UW Bothell, and Affiliated Entities. Other navigation buttons visible are "Events" and "Training".

# Considerations

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

# Logging in to TouchNet

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

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

TouchNet TEST Environment:

<https://test.secure.touchnet.net:8443/centraltest>

TouchNet PRODUCTION Environment:

<https://secure.touchnet.net:443/central>

> If you do not have TouchNet login credentials or have been locked out of your account, please contact: [pcihelp@uw.edu](mailto:pcihelp@uw.edu).

- Marketplace Home
  - System Administration
  - Academic Tech
  - ASUW
  - Autism Center
  - Botanic Gardens
  - Brotman Baty Inst
- Career Center
  - Settings
  - Accounting Codes
  - Users
  - Tax Account Codes
- Stores
  - Add New Store
  - UW Career Center
    - Store Settings
      - General
      - Status Management
      - Email Messages
      - Text Messages
      - Single Store
      - Store Template Setup **NEW!**
      - Point of Sale
      - Users
      - Payment Methods
      - Shipping Classes
      - Categories
      - Products
      - Allowed Groups
      - Group Payment Methods
      - Promotions
      - User Modifiers
      - Tax Method
      - Tax Account Codes

## UW Career Center General

Settings on this page change your store display a

### General Settings

Store Id :

Store Name:

Show the Store Display Name on Store Home Page

Store Display Name:

Store status:

Point of Sale status:

Applies only to this store and products Managen

Time Zone:

### Donation Notification

To send donation notifications, enter email add

Email addresses:  
(500 chars max)

### Low Inventory Product Notification

To send low inventory notifications for product:

The quickest and easiest way to set up your uStore is to navigate through each menu item under **Store Settings** following prompts and using wizards.

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

Each store's general settings can be changed easily whenever necessary by the store manager. You will have a better idea of your store's total design if you make initial choices and then edit as necessary while you build the store.

# Throughout the editing process, you can view your store as the customer will see it from the Marketplace Operations Center Home

**U.Commerce Central** TEST Gordon S

Home Dashboard RECON1 Applications Administration Client Community Help

Marketplace Home

- System Administration
- Academic Tech
- ASUW
- Autism Center
- Botanic Gardens
- Brotman Baty Inst
- Career Center
- Center AIDS and HIV
- COASST
- Col - Built Envir
- Continuum College
- CS & EE
- Dept Health Services
- Dept Surgery
- Diabetes Research
- DoM IM Residency
- Event Network
- Foster Business Schl
- Haring Center
- HFS - Housing & Food
- HMC Clin Ed
- HMC Trauma Outreach
- HUB Ticketing
- Husky Marching Band
- Library
- Linguistics
- Molecular & Cell Bio
- Office of Ceremonies
- OMS
- Pediatrics
- Psych & Behav Sci
- Psychology
- Rehab Medicine
- Sch Public Health
- School of Law
- School of Nursing
- SeaGrant
- Social Work
- Student Finance Svcs
- T2 Parking Merchants
- Test Center
- The Whole U

## Marketplace Operations Center Home

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

### Mall Link and Search

University of Washington Test Marketplace View Mall

Order or System Tracking ID :

[Advanced Search](#)

### Stores

Show 10 entries

	Name	Id	Template	Type	Merchant Name	Web	Mobile	Point of Sale	Fulfillments Pending	Links	
<input type="checkbox"/>	Academic Technologies	37	Designer: Fixed Width	General	Academic Tech	Enabled	N/A	Disabled	0	View Store	
<input type="checkbox"/>	ASUW	38	Designer: Fixed Width	General	ASUW	Disabled	N/A	Disabled	0		
<input type="checkbox"/>	Brotman Baty Institute for Precision Medicine	28	Designer: Fixed Width	General	Brotman Baty Inst	Enabled	N/A	Disabled	0	View Store	
<input type="checkbox"/>	Center for Statistics & Social Sciences (CSSS)	24	Designer: Fixed Width	General	UW CSSS	Enabled	N/A	Disabled	0	View Store	
<input type="checkbox"/>	COASST	8	Designer: Fixed Width	General	COASST	Enabled	N/A	Disabled	0	View Store	
<input type="checkbox"/>	Computer Science & Engineering	43	Designer: Fixed Width	General	CS & EE	Enabled	N/A	Disabled	0	View Store	
<input type="checkbox"/>	Department of Psychiatry & Behavioral Sciences	5	Designer: Fixed Width	General	Psych & Behav Sci	Enabled	N/A	Disabled	0	View Store	
<input type="checkbox"/>	Department of Urology	42	Designer: Fixed Width	General	Urology	Enabled	N/A	Disabled	0	View Store	
<input type="checkbox"/>	Diabetes Research Center	32	Designer: Fixed Width	Single	Diabetes Research	Enabled	N/A	Disabled	0	View Store	

# General Settings

**U.Commerce Central** TEST

Home Dashboard RECON1 Applications Administration Client Community Help

- Marketplace Home
  - System Administration
  - Academic Tech
  - ASUW
  - Autism Center
  - Botanic Gardens
  - Brotman Baty Inst
  - Career Center
    - Settings
    - Accounting Codes
    - Users
    - Tax Account Codes
  - Stores
    - Add New Store
    - UW Career Center
      - Store Settings
        - General

## UW Career Center General Settings

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

General Settings	
Store Id :	11
Store Name:	<input type="text" value="UW Career Center"/>
Show the Store Display Name on Store Home Page:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Store Display Name:	<input type="text" value="UW Career &amp; Internship Center"/>
Store status:	Enabled Manage Status

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

**Important:**  
Do Not Enable your store in the PRODUCTION Environment. The Merchant Services team will enable your store when it is ready to go live.

# General Settings (cont.)

U.Commerce Central TEST

Home Dashboard RECON1 Applications Administration Client Community Help

Store Template Setup **NEW!** Time Zone: Pacific Daylight Time - America/Vancouver (-7:00)

Point of Sale  
Users  
Payment Methods  
Shipping Classes  
Categories  
Products  
Allowed Groups  
Group Payment Methods  
Promotions  
User Modifiers  
Tax Method  
Tax Account Codes  
Order Search  
GL Exceptions (0)  
uPay Sites  
Center AIDS and HIV  
COASST  
Col - Built Envir  
Continuum College  
CS & EE  
Dept Health Services  
Dept Surgery  
Diabetes Research  
DoM IM Residency  
Event Network  
Foster Business Schl  
Haring Center  
HFS - Housing & Food  
HMC Clin Ed  
HMC Trauma Outreach  
HUB Ticketing  
Husky Marching Band  
Library  
Linguistics  
Molecular & Cell Bio  
Office of Ceremonies  
OMS  
Pediatrics  
Psych & Behav Sci  
Psychology  
Rehab Medicine  
Sch Public Health  
School of Law  
School of Nursing  
SeaGrant  
Spirit Work

**Donation Notification**  
To send donation notifications, enter email address. For multiple email addresses use a comma as a separator.  
Email addresses: (500 chars max)

**Low Inventory Product Notification**  
To send low inventory notifications for products, enter email address. For multiple email addresses use a comma as a separator.  
Email addresses: (500 chars max)

**Digital Files**  
Total Digital File Space Used By Store (bytes): 0  
Total Size Available for Digital Files (bytes): 0

**Admin Settings**  
Allow Partial Refunds:  Yes  No  
Allow The Refunding Of Shipping:  Yes  No  
Allow Recurring Payments On Donation Product Type:  Yes  No  
Require shopper acknowledgment of return policy:  Yes  No  
Accounting code is required to complete updates to the General Ledger.  
Perform General Ledger Updates:  Yes  No  
Default Accounting Code:  Use Accounting Codes to define this list.

**Continue Shopping Button Settings**  
To configure where the Continue Shopping button on the Shopping Cart page takes an end user, select a value in drop down list below.  
Continue Shopping Button settings:  Use Default Settings

Save

Notification fields are intended to notify store staff not customers

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

Always remember to click "Save". There may be multiple "Save" buttons on each screen.

# Email Messages

Customers will have the option to print a copy of their order receipt from their web browser at the conclusion of their purchase. They will also automatically receive email messages with order status confirmation.

**U.Commerce Central TEST**

Home Dashboard ▾ RECON1 Applications ▾ Administration Client Community ▾ Help

- ▼ Marketplace Home
  - ▶ System Administration
  - ▶ Academic Tech
  - ▶ ASUW
  - ▶ Autism Center
  - ▶ Botanic Gardens
  - ▶ Brotman Baty Inst
- ▼ Career Center
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  - Accounting Codes
  - Users
  - Tax Account Codes
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  - Add New Store
- ▼ UW Career Center
  - ▼ Store Settings
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      - Text Messages
      - Single Store
      - Store Template Setup **NEW!**
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      - Group Payment Methods
      - Promotions
      - User Modifiers
      - Tax Method

## UW Career Center Email Messages

Settings on this page change messages included in uStore emails.

Email Messages
Thank You Statement: (500 chars max)
Order Announcement: (5,000 chars max)
Fulfillment Announcement: (5,000 chars max)
Cancel Order Announcement: (5,000 chars max)
Refund Order Announcement: (5,000 chars max)

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



# Email Messages (cont.)

## Order Receipt

### Thank You!

#### This is your Order summary.

An Order confirmation email was sent to the following address: scherer@uw.edu

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

### Order #561 - Merchant Services

Payment	Details	Billing Information
Visa Reference Number: 20200505000000	xxxxxxxxxxxx1111 Gordon Scherer	Gordon Scherer 4300 Roosevelt Way NE Campus Box 354965 seattle, WA 98125 United States

Item Information	Quantity	Amount
OMS Jacket : Extra-Large : Men's	1	\$175.00
Stock Number: Jacket-M-XL		
	SubTotal:	\$175.00
	Tax:	\$0.00
	<b>Total:</b>	<b>\$175.00</b>

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

## Order Receipt TEST

Thank you for purchasing from Merchant Services.

Order alert!

Order:	561
Terminal Id:	DEVICE_ID
Store:	Merchant Services
Date/Time:	May 5, 2020 9:45:07 AM PDT
Total:	\$175.00

#### Billed To:

Gordon Scherer  
4300 Roosevelt Way NE  
Campus Box 354965  
seattle, WA  
98125  
United States

#### Contact Email:

[scherer@uw.edu](mailto:scherer@uw.edu)

#### Payment Information:

Payment Type:	Credit Card
Credit Card Number:	xxxxxxxxxxxx1111
Reference Number:	20200505000000
Card Type:	Visa

\*\*\* Card Not Present \*\*\*

#### Shipping Information:

Shipping Information: 577  
Delivery Method: Walk-in

Item	Stock Number	Quantity	Unit Price	Detail Total
OMS Jacket : Extra-Large : Men's	Jacket-M-XL	1	\$175.00	\$175.00
			Subtotal:	\$175.00
			Tax:	\$0.00
			<b>Total:</b>	<b>\$175.00</b>

For questions, comments, or Order status, send email to [ecommerce@uw.edu](mailto:ecommerce@uw.edu) and refer to Order 561. Visit us [online](#).

Example of the email order receipt received by the customer

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# Single-Store Settings

Marketplace Home  
▼ OMS  
Settings  
Accounting Codes  
Users  
Tax Account Codes  
▼ Stores  
Add New Store  
HMC PDNE  
▼ Merchant Services  
▼ Store Settings  
General  
Status Management  
Email Messages  
Text Messages  
● Single Store  
Store Template Setup **NEW!**  
Point of Sale  
Users  
Payment Methods  
Shipping Classes  
Categories  
Products  
Allowed Groups  
Group Payment Methods  
Promotions  
User Modifiers  
Tax Method  
Tax Account Codes  
Order Search

## Merchant Services: Single Store Settings

Print Page

Settings determine accessibility and display for single stores.

### General Settings

<b>Id :</b>	7
<b>Name:</b>	Merchant Services
<b>Use Single Store Mode:</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No

Settings determine accessibility and display for single stores.

Store Is Viewable in Mall:  Yes  No

Single Store Mode uses customized style sheets, layouts and links. Upon selection, store is entered but mall is exited. Navigation back into the mall is available only by the browser back button.

When viewable in mall, display the store in this mode:  
 Single store mode  
 Mall mode

Shown in pop-up to let shoppers know they are exiting the mall for a store in Single Store Mode (250 chars max):

### Display Settings

<b>Show Cart Quantity:</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Show Promotional Code:</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No

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

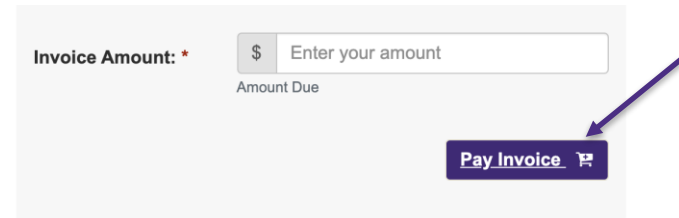
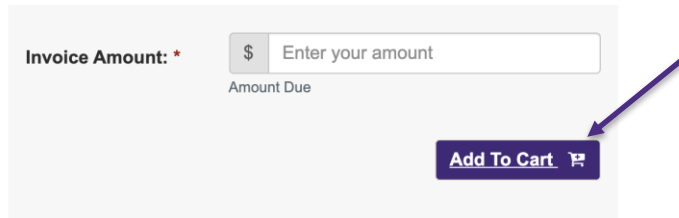
Promotion details are set separately.

Item Name	Store	Quantity	Remove	Amount
<b>OMS Jacket : Extra-Large : Men's</b>	Merchant Services	1		\$166.00
<b>Stock number:</b>	Jacket-M-XL			<del>\$2.50</del>
<b>UW Status:</b>	UW Student			
				<b>Total: \$82.50</b>
<input type="text" value="Promotional Code"/>				<b>Apply</b>
✓ Applied Promotion: "OMSSALE"				

# Single-Store Settings (cont.)

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

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



# Store Template Setup

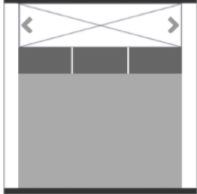
The **Designer: Fixed Width** template is a new feature within TouchNet. It offers greater ability to customize and brand your uStore without needing to know HTML or CSS. The **Classic** template will eventually be phased out. We strongly recommend creating your store with the **Designer: Fixed Width**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

- ▼ OMS
  - Settings
  - Accounting Codes
  - Users
  - Tax Account Codes
- ▼ Stores
  - Add New Store
  - ▶ HMC PDNE
- ▼ Merchant Services
  - ▼ Store Settings
    - ▼ General
    - Status Management
    - Email Messages
    - Text Messages
    - Single Store
    - Store Template Setup **NEW!**
    - Point of Sale
    - Users
    - Payment Methods
    - Shipping Classes
    - Categories
    - Products
    - Allowed Groups
    - Group Payment Methods
    - Promotions
    - User Modifiers
    - Tax Method
    - Tax Account Codes
  - Order Search

## Merchant Services Store Templates

Select a template below to setup your store layout.

Designer: Fixed Width **NEW!**

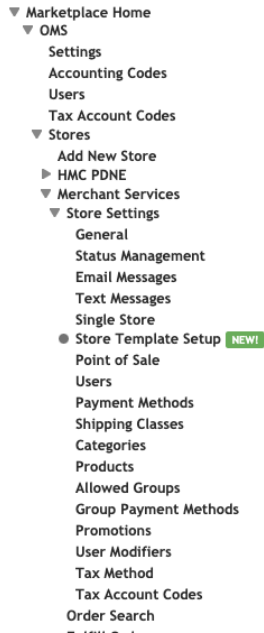


**Current** Edit

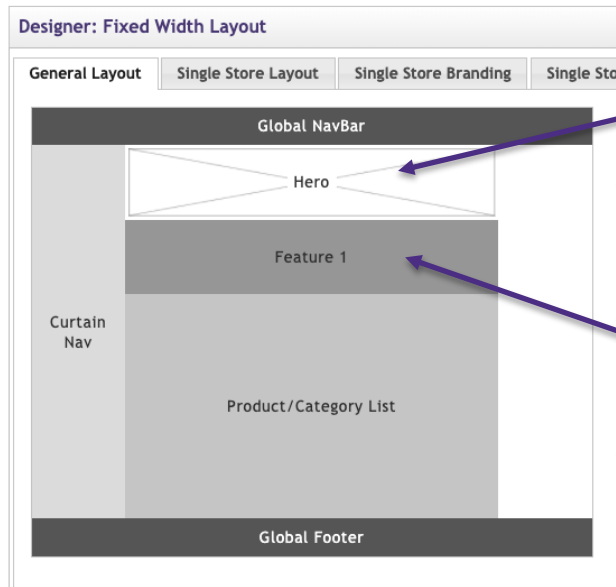
- ✓ Fixed Width Layout (1170px)
- ✓ Hero Carousel Option **NEW!**
- ✓ Multiple Feature Sections **NEW!**

# Store Template Setup (cont.)

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



## Merchant Services Template Setup



### Main Home Page Image

*We recommend you use an image:*

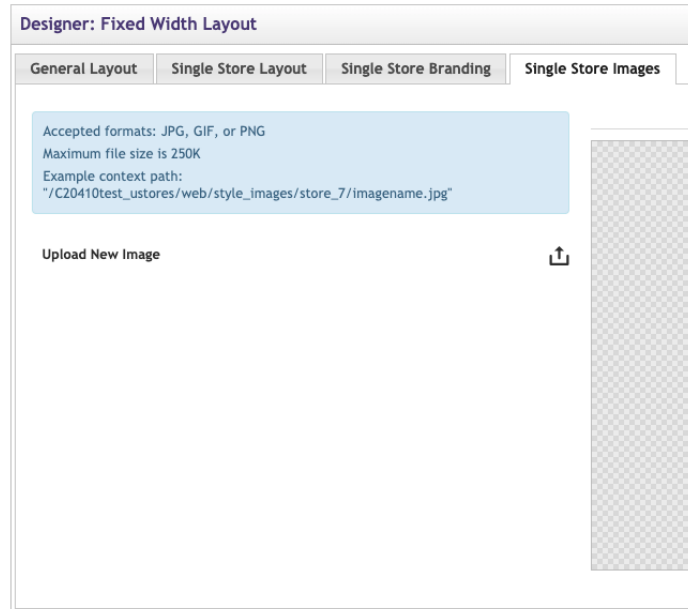
- 1140 pixels wide by 320 pixels high
- Accepted file formats: JPG, GIF, or PNG
- Maximum file size is 250 KB

Optional area for customized HTML and CSS.

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

# Store Template Setup (cont.)

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



# Template Setup: Single Store Branding Cheat Sheet

The diagram illustrates the branding components of a single store template. On the left, a vertical list of ten gold-colored boxes contains the component names. Yellow arrows point from each box to its respective location on a sample e-commerce page for the University of Washington. The page features a purple header with the university logo, a large banner image of a building by a lake, a 'Merchant Services' section with a heading and breadcrumb, and a 'Store Categories' section with two image-based category cards. The footer contains copyright information, social media icons, and a 'touchnet' logo.

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

\*Headings 3-6 are for optional template components

# Users

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

- Marketplace Home
  - System Administration
    - OMS
      - Settings
        - Accounting Codes
        - Users
        - Tax Account Codes
      - Stores
        - Add New Store
        - HMC PDNE
        - Merchant Services
          - Store Settings
            - General
            - Status Management
            - Email Messages
            - Text Messages
            - Single Store
            - Store Template Setup NEW!
            - Point of Sale
            - Users
            - Payment Methods
            - Shipping Classes
            - Categories
            - Products
            - Allowed Groups
            - Group Payment Methods
            - Promotions
            - User Modifiers
            - Tax Method
            - Tax Account Codes
          - Order Search
          - Fulfill Orders
          - GL Exceptions (0)
        - uPay Sites
        - Pediatrics

## Edit User

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

[Back To Users](#)

### User Status

Status Enabled

### User Information

U.Commerce Username: C20410  
First Name:  
Last Name:  
U.Commerce Email: @uw.edu  
Email:

### Marketplace Roles

Assigned Roles	Available Roles
Remove	Add
<input type="checkbox"/> Fulfiller with cancel/refund rights	<input type="checkbox"/> Fulfiller
<input type="checkbox"/> Point of Sale Attendant with Refund Rights	<input type="checkbox"/> Store Clerk
	<input type="checkbox"/> Store Accountant
	<input type="checkbox"/> Point of Sale Attendant

[Save](#)

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

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

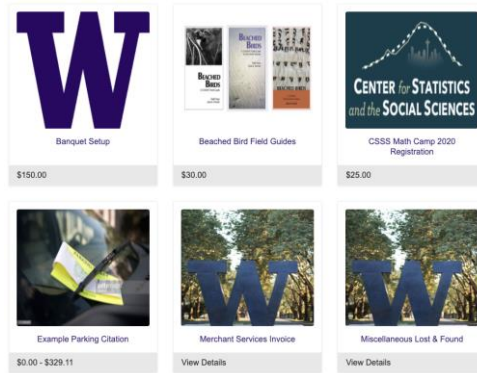
**Store Accountants** – Responsible for reviewing the **Revenue by Merchant** report.



# Categories

## Examples of category layouts/views

### Products






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

**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.

### Example Items

Home Merchant Services Example Items

The items in this category were taken from real-life examples of payment situations at the University of Washington.

 <b>Beached Bird Field Guides</b> Options for three of our beached bird field guides are available: Beached Bird Field Guide, Beached Bird Field Guide to North Atlantic, Beached Bird Field Guide to Alaska	Price: \$30.00 Beached Bird Field Guide: <input type="text" value="Select One"/> Quantity: <input type="text" value="1"/>
 <b>CSSS Math Camp 2020 Registration</b> Register for Math Camp with the Center for Statistics and the Social Science this year!	Price: \$25.00 Quantity: <input type="text" value="1"/>
 <b>Example Parking Citation</b> In order to pay online, you will need the citation reference number and the vehicle license plate number. If you do not know your citation reference number, email your name and vehicle license plate number(s) to <a href="mailto:transit@uw.edu">transit@uw.edu</a> to request an invoice. An invoice will be emailed to you within two business days. After receiving your invoice, you will then be able to pay your citations here.	Price: \$0.00 - \$329.11 (depends on options selected) Violation Type: <input type="text" value="Select One"/> Violation Status: <input type="text" value="Select One"/> Quantity: <input type="text" value="1"/>

Category layout

UNIVERSITY of WASHINGTON

# Products

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

Marketplace Home

- ▼ OMS
  - Settings
    - Accounting Codes
    - Users
    - Tax Account Codes
  - ▼ Stores
    - Add New Store
    - ▶ HMC PDNE
  - ▼ Merchant Services
    - ▼ Store Settings
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        - Tax Method
        - Tax Account Codes





## Merchant Services Products

Print Page 

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

[Add Product](#) [Import Product](#) [Related Products](#)

[Product Barcode](#)

Products									
Show 25 entries Search: <input type="text"/>									
<input type="checkbox"/>	Name	Type	Items for Sale	Quantity	Store Category	Web	Point of Sale		
<input type="checkbox"/>	Banquet Setup	Generic	1	10					<ul style="list-style-type: none"><li>Change Web Availability</li><li>Change Point of Sale Availability</li><li><b>Assign/Remove Categories</b></li><li>Social Media Management</li><li><b>Schedule Price Update</b></li><li><b>Delete Product</b></li><li><b>Clone Product</b></li></ul>
<input type="checkbox"/>	Beached Bird Field Guides	Generic	3	3					
<input type="checkbox"/>	CSSS Math Camp 2020 Registration	Generic	1	38		(Store Home Page),	Enabled Disabled		

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

You can **Clone** an existing product from within that product's settings.

# Products (cont.)

## Adding a single product

▼ Marketplace Home  
▼ OMS  
Settings  
Accounting Codes  
Users  
Tax Account Codes  
▼ Stores  
Add New Store  
▶ HMC PDNE  
▼ Merchant Services  
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User Modifiers  
Tax Method  
Tax Account Codes  
Order Search  
Fulfill Orders  
GL Exceptions (0)  
▶ uPay Sites  
▶ Pediatrics

### Add Product

Print Page

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

[Back To Products](#)

Product Settings	
Product Name: (200 chars max)	<input type="text"/>
Short Description: (500 chars max) (HTML Allowed)	<input type="text"/>
Point of Sale Description: (500 chars max) (No HTML Allowed)	<input type="text"/>
Long Description: (30,000 chars max) (HTML Allowed)	<input type="text"/>
Product Type	<input checked="" type="radio"/> Generic <input type="radio"/> Digital <input type="radio"/> Donation
Should this be offered as an additional item at checkout?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Should this be offered only as an additional item at checkout? (Only if yes to question above)	<input type="radio"/> Yes <input checked="" type="radio"/> No

Depending on the chosen store or category layout, shoppers may add some products to the cart without seeing the long descriptions. Put critical details in both the short and long descriptions to make sure shoppers see this information.

You may want to use the long description to provide shoppers with additional information about the available options. If the product requires special shipping information or if its return policy differs from the store policy, you can add those details here.

# Products (cont.)

## Adding a single product

- ▼ Marketplace Home
- ▼ OMS
- Settings
- Accounting Codes
- Users
- Tax Account Codes
- ▼ Stores
- Add New Store
- ▶ HMC PDNE
- ▼ Merchant Services
- ▼ Store Settings
- General
- Status Management
- Email Messages
- Text Messages
- Single Store
- Store Template Setup NEW!
- Point of Sale
- Users
- Payment Methods
- Shipping Classes
- Categories
- Products
- Allowed Groups
- Group Payment Methods



### Test Product : Add Product

Print Page 

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

[Back To Products](#)

#### Miscellaneous Settings

Shipping Class:	Walk-In 
Tax Class:	default tax rate 
<b>Special Authorization Question and Answer limit customers with product purchasing power.</b>	
Special Authorization is required to purchase product:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Special Authorization Question:	<input type="text"/>
Special Authorization Answer:	<input type="text"/>
Shipping/Handling message:	<input type="text"/>

[Continue](#)

[Cancel](#)

Choose from shipping classes you have created

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

Access to purchase products can be restricted

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

# Products (cont.)

## Adding a single product

Marketplace Home  
▼ OMS  
Settings  
Accounting Codes  
Users  
Tax Account Codes  
▼ Stores  
Add New Store  
▶ HMC PDNE  
▼ Merchant Services  
▼ Store Settings  
General  
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Store Template Setup **NEW!**  
Point of Sale  
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Group Payment Methods  
Promotions  
User Modifiers  
Tax Method  
Tax Account Codes  
Order Search  
Fulfill Orders  
GL Exceptions (0)  
▶ uPay Sites  
▶ Pediatrics

Test Product : Add Product Print Page

Set the stock number, price and item for sale settings.

[Back To Products](#)

Item for Sale Settings	
Item for Sale	Id
Test Product	Set with confirmation
Price is in USD ( \$ )	
Price:	<input type="text" value="1.00"/>
Stock Number (Maximum characters 30):	<input type="text"/>
<a href="#">Assign Random Stock #</a>	
<input checked="" type="checkbox"/> Check to see if stock number is already used	
Limit Quantity:	<input type="radio"/> Yes, Maximum Per Order: <input type="text"/> <input checked="" type="radio"/> No
Track Inventory:	<input type="radio"/> Yes, Initial Inventory: <input type="text"/> Disable this product when inventory reaches zero <input checked="" type="radio"/> No
Out of Stock Message (This message will appear if the item goes out of stock): (500 chars max) (HTML Allowed)	<input type="text"/>
Low Inventory Notification:	<input type="radio"/> Yes, Low Inventory Notification Quantity: <input type="text"/> <input checked="" type="radio"/> No
Back Orderable:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Fulfillment:	<input type="text" value="Please Select"/>

**Product Notification**

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

Email addresses:  
(500 chars max)

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

This field is intended to notify store administrators, not customers.

# Products (cont.)

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

Marketplace Home

- OMS
  - Settings
  - Accounting Codes
  - Users
  - Tax Account Codes
- Stores
  - Add New Store
  - HMC PDNE
- Merchant Services
  - Store Settings
    - General
    - Status Management
    - Email Messages
    - Text Messages
    - Single Store
    - Store Template Setup **NEW!**
    - Point of Sale
    - Users
    - Payment Methods
    - Shipping Classes
    - Categories
  - Products**
    - Allowed Groups
    - Group Payment Methods
    - Promotions
    - User Modifiers
    - Tax Method
    - Tax Account Codes
  - Order Search
  - Fulfill Orders

Merchant Services Products Print Page

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

[Add Product](#) [Import Product](#) [Related Products](#)

[Product Barcode](#)

Products						
Show	25 entries					
Name	Type	Items for Sale	Q	It	Sa	38
<input type="checkbox"/>	Banquet Setup	Generic	1	10		
<input type="checkbox"/>	Beached Bird Field Guides	Generic	3	Ve	It	Sa
<input type="checkbox"/>	CSSS Math Camp 2020 Registration	Generic	1	38		

Change Web Availability  
Change Point of Sale Availability  
Assign Multiple Mall Categories  
Remove Multiple Mall Categories  
Assign Multiple Store Categories  
Remove Multiple Store Categories  
Social Media Management  
Schedule Price Update  
Create Package  
Delete Products

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

# Products (cont.)

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

- Marketplace Home
  - OMS
    - Settings
      - Accounting Codes
      - Users
    - Tax Account Codes
  - Stores
    - Add New Store
    - HMC PDNE
  - Merchant Services
    - Store Settings
      - General
      - Status Management
      - Email Messages
      - Text Messages
      - Single Store
      - Store Template Setup NEW!
      - Point of Sale
      - Users
      - Payment Methods
      - Shipping Classes
      - Categories
    - Products
      - Allowed Groups
      - Group Payment Methods
      - Promotions
      - User Modifiers
      - Tax Method
      - Tax Account Codes
    - Order Search
    - Fulfill Orders
    - GL Exceptions (0)


## Merchant Services Invoice: Product Settings

Print Page 

Settings on this page configure the product.

[Back To Products](#)

### General Settings

<b>Id:</b>	65
<b>Type:</b>	Donation
<b>Name:</b> (200 chars max)	Merchant Services Invoice 
<b>Items for Sale (1):</b>	<a href="#">View</a>   <a href="#">Add Options</a>
<b>Modifiers:</b>	<a href="#">Manage Modifiers</a>
<b>Attendee List:</b>	<a href="#">Add List</a>
<b>Web status:</b>	Enabled <a href="#">Manage Status</a>
<b>Point of Sale status:</b>	Disabled <a href="#">Manage Status</a>

### Category Settings

	Assignments	Actions
<b>Mall Assignments:</b>	None	<a href="#">Manage Assignments</a>
<b>Store Assignments:</b>	(Store Home Page) Example Items	<a href="#">Manage Assignments</a>

# Products (cont.)

**Options vs. Modifiers:** An **Option** is a factor such as size or color that may or may not change the price but results in a different inventory item. A **Modifier** allows you to gather additional buyer info. It may or may not change the price but does not result in a different inventory item.

**Stock number:** Jacket-M-XL  
**Price:** \$175.00  
**Quantity:** 1

The UW Status **Option** can be selected, resulting in a different product/stock number

**Stock number:** Jacket-M-XL  
**Price:** \$175.00  
**Quantity:** 1

**UW Status**

Select One

**Monogram (\$5.00)**

(3 characters maximum)

A **Modifier** was added to gather additional buyer info for an optional feature

**UW Status**

✓ Select One

- UW Faculty/Staff
- UW Student (\$ -10.00)
- UW Alumni
- UW Community Member

(3 characters maximum)


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



# Products (cont.)

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


OMS Jacket:Edit Option

Print Page 

Option and values associated with the product. Items for Sale are combined option and values.

[Back To Products](#)

[Back to Product Settings](#)

Option		
Option Name		
Size 		
Option Values	Sort Key	Action
<input type="text" value="Extra-Small"/>	<input type="text"/>	Delete
<input type="text" value="Small"/>	<input type="text"/>	Delete
<input type="text" value="Medium"/>	<input type="text"/>	Delete
<input type="text" value="Large"/>	<input type="text"/>	Delete
<input type="text" value="Extra-Large"/>	<input type="text"/>	Delete
<input type="text" value="XX-Large"/>	<input type="text"/>	Delete


[Add](#)


[Save](#)

[Cancel](#)

Options as the customer sees them

Values as the customer sees them

	<b>OMS Jacket</b> Office of Merchant Services embroidered jacket	<b>Price:</b> \$175.00 - \$200.00 <small>(depends on options selected)</small>
	<b>Men's/Women's Sizing:</b>	<input type="text" value="Men's"/>
	<b>Size:</b>	<input type="text" value="Extra-Large"/>
	<b>Quantity:</b>	<input type="text" value="1"/>



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# Products (cont.)

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

Marketplace Home  
▼ OMS  
Settings  
Accounting Codes  
Users  
Tax Account Codes  
▼ Stores  
Add New Store  
▶ HMC PDNE  
▼ Merchant Services  
▼ Store Settings  
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Single Store  
Store Template Setup **NEW!**  
Point of Sale  
Users  
Payment Methods  
Shipping Classes  
Categories  
● Products  
Allowed Groups  
Group Payment Methods  
Promotions

Merchant Services Invoice: Manage Modifiers Print Page 🖨

Add, edit or remove modifiers. Sort key controls display order.

Back To Products Back To Product Settings

### Add Modifier

Type	Example
Drop-down Selection	Example Optional   Example Required
Text Entry	Example Optional   Example Required
Multiple Select Checkboxes	Example Optional   Example Required

### Add Modifier Group

Type	Example
Table Builder	Example

### Modifiers

Name	Sort Key	Type	Frequency	Format <a href="#">What is this?</a>	Actions
------	----------	------	-----------	--------------------------------------	---------

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

These **Modifiers** can be arranged for easier viewing with the **Table Builder**.

# Products (cont.)

**Text Entry Modifiers:** the shopper is asked to enter a text response to a prompt. This is useful for names and other custom buyer info.

Marketplace Home  
▼ OMS  
Settings  
Accounting Codes  
Users  
Tax Account Codes  
▼ Stores  
Add New Store  
▶ HMC PDNE  
▼ Merchant Services  
▼ Store Settings  
General  
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Text Messages  
Single Store  
Store Template Setup **NEW!**  
Point of Sale  
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Payment Methods  
Shipping Classes  
Categories  
● Products  
Allowed Groups  
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Promotions

Merchant Services Invoice: Add Product Modifier Print Page

Text Entry Modifier are shown with the Item For Sale. Price adjustment is the amount added to or subtracted from the base product price.

[Back To Products](#) [Back to Product Settings](#) [Back to Manage Modifiers](#)

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

[Add Modifier](#)

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

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

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

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

# Products (cont.)

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

Back To Products    Back to Product Settings    Back to Manage Modifiers

**Drop-Down Selection**

Name: UW Status

Type:  Required  Optional

Frequency:  Static (Displayed once per product)  Dynamic (Repeated based on quantity purchased)

Buyer will make selection from the entries below:

Selection	Price Adjustment
1. UW Faculty/Staff	0.00
2. UW Student	-10.00
3. UW Alumni	0.00
4. UW Community Member	0.00

[Add More Selections](#)

Apply to All Items for Sale:

Apply to Selected Items for Sale:

Extra-Small : Men's  
Extra-Small : Women's  
Small : Men's  
Small : Women's

[Update Existing Modifier](#)

Price adjustments can be increased, decreased, or no change

Stock number: Jacket-M-XL  
Price: \$175.00  
Quantity: 1


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

Select One

- UW Faculty/Staff
- ✓ UW Student (\$ -10.00)
- UW Alumni
- UW Community Member

# Products (cont.)

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

MultiSelect Checkbox	
Name:	Extras 
Type:	<input type="radio"/> Required <input checked="" type="radio"/> Optional
Frequency:	<input checked="" type="radio"/> Static (Displayed once per product) <input type="radio"/> Dynamic (Repeated based on quantity purchased)
<b>Buyer will make selection from the entries below:</b>	
Selection	Price Adjustment
1. <input type="text" value="Signed Poster"/>	<input type="text" value="5.00"/>
2. <input type="text" value="Coffee Mug"/>	<input type="text" value="7.00"/>
3. <input type="text" value="Souvenir Pen"/>	<input type="text" value="3.00"/>
<input type="button" value="Add More Selections"/>	

Mascot Factory UW Husky Chublet Plush with Sweater

**Stock number:** UWhuskydoll

**Price:** \$15.00

**Quantity:** 1

## Extras

- Signed Poster (\$5.00)
- Coffee Mug (\$7.00)
- Souvenir Pen (\$3.00)

Example of **MultiSelect Checkbox** seen by customer

# Products (cont.)

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

General Settings	
<b>Id:</b>	32
<b>Type:</b>	Generic
<b>Name:</b> (200 chars max)	<input type="text" value="OMS Event"/>
<b>Items for Sale (1):</b>	<a href="#">View</a>   <a href="#">Add Options</a>
<b>Modifiers:</b>	<a href="#">Manage Modifiers</a>
<b>Attendee List:</b>	<a href="#">Add List</a>
<b>Web status:</b>	Enabled <a href="#">Manage Status</a>
<b>Point of Sale status:</b>	Disabled <a href="#">Manage Status</a>

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

# Products (cont.)

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

\* Indicates required information

**Attendees**

	<b>First Name *</b>	<b>Middle Initial</b>	<b>Last Name *</b>	<b>Food Sensitivities *</b>
1	<input type="text"/> (1-100 characters)	<input type="text"/> (1 character maximum)	<input type="text"/> (1-100 characters)	<input type="checkbox"/> <b>Gluten Sensitive</b> <input type="checkbox"/> <b>Peanut Allergy</b> <input type="checkbox"/> <b>Vegetarian</b> <input type="checkbox"/> <b>Vegan</b> <input type="checkbox"/> <b>Other</b>
2	<input type="text"/> (1-100 characters)	<input type="text"/> (1 character maximum)	<input type="text"/> (1-100 characters)	<input type="checkbox"/> <b>Gluten Sensitive</b> <input type="checkbox"/> <b>Peanut Allergy</b> <input type="checkbox"/> <b>Vegetarian</b> <input type="checkbox"/> <b>Vegan</b> <input type="checkbox"/> <b>Other</b>

**Email Address \***

\* Indicates required information

**First Name \***

(1-1,000 characters)

**Last Name \***

(1-1,000 characters)

**Email \***

(6-1,000 characters)

# Products (cont.)

To add a Digital Products:

1. Request digital space from [pcihelp@uw.edu](mailto:pcihelp@uw.edu)
2. When adding in Products, select Digital and add as you would any other product

Item for Sale Settings	
Item for Sale	Id
Test Product	Set with confirmation
Price is in USD ( \$ )	
Price:	<input type="text" value="1,000.00"/>
Stock Number (Maximum characters 30):	<input type="text"/>
<input type="button" value="Assign Random Stock #"/>	
<input checked="" type="checkbox"/> Check to see if stock number is already used	
Upload product file:	Select file for upload
Limit Order Quantity:	<input type="radio"/> Yes, Maximum Order Quantity: <input type="text"/> <input checked="" type="radio"/> No
Limit Downloads:	<input type="radio"/> Yes, Maximum Downloads: <input type="text"/> <input checked="" type="radio"/> No
Limit Time For Download:	<input type="radio"/> Yes, Maximum Time Limit in days: <input type="text"/> <input checked="" type="radio"/> No
Fulfillment:	<input type="button" value="Please Select ↓"/>

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

Indicate how long the customer has to complete their downloads.



# Products (cont.)

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

Product Settings	
Product Name: (200 chars max)	<input type="text" value="Invoice Payment"/>
Short Description: (500 chars max) (HTML Allowed)	<input type="text" value="Pay Invoice"/>
Point of Sale Description: (500 chars max) (No HTML Allowed)	<input type="text"/>
Long Description: (30,000 chars max) (HTML Allowed)	<input type="text"/>
Product Type	<input type="radio"/> Generic <input type="radio"/> Digital <input checked="" type="radio"/> Donation
Should this be offered as an additional item at checkout?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Should this be offered only as an additional item at checkout? (Only if yes to question above)	<input type="radio"/> Yes <input checked="" type="radio"/> No

Product Name will be seen by the customer

Donation must be selected

# Categories

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

## Merchant Services Categories

Print Page 

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

Add Top-Level Category

Manage Category List

### Product Categories

Show 10 entries

Search:

<input type="checkbox"/>	Id	Name	Parent Category	Products	Web	Point of Sale	
		(Featured Items - Point of Sale only)		1	N/A	N/A	
		(Store Home Page)		14	N/A	N/A	
<input type="checkbox"/>	12	Demo Items		4	Change Web Availability		
<input type="checkbox"/>	19	Example Items		7	Change Point of Sale Availability		
<input type="checkbox"/>	25	TouchNet Week		0	Edit		
					Add Sub-Category		

Showing 1 to 5 of 5 entries

First Previous 1 Next Last

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

# Promotions

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

## Add Store Promotion

Promotions will not apply to package products. Separate email addresses with a delimiter like a comma or semi-colon. Enter the same delimiter in the Delimiter Used field.

[Back To Promotions](#)

### Promotion Information

If a promotion code is not provided, a system generated numeric promotion code will be assigned.

Promotion Code:	<input type="text" value="OMSSALE"/>
Name of Promotion:	<input type="text" value="OMS Clearance Sale"/>
Promotion Description:	<input type="text" value="OMS Clearance Sale"/>

### Promotion Discount

Promotion Type:	<input type="text" value="Percentage Off Per Item"/>
All amounts are in USD ( \$ )	
For percentage off promotions enter the percentage as a whole number. 10 for 10%. For amount promotions enter the amount. 5 for \$5.00	
Value Off:	<input type="text" value="50"/>

### Promotion Usage

From:	<input type="text" value="5/1/20"/>	To:	<input type="text" value="5/31/20"/>
Please note: The following two settings do not apply to Point of Sale orders.			
Can a customer use this promotion code more than once?	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Maximum number of times this promotion code can be used by all users:	<input type="text"/>		

### Promotion Email

Email Addresses Receiving Promotion:	<input type="text"/>
Delimiter used to separate Email Addresses:	<input type="text"/>
<input type="checkbox"/> Send Email to specified Email Addresses:	<input type="checkbox"/>

[Create Promotion](#)

Item Name	Store	Quantity	Remove	Amount
OMS Jacket : Extra-Large : Men's	Merchant Services	<input type="text" value="1"/>		\$166.00 \$82.50
Stock number:	Jacket-M-XL			
UW Status:	UW Student			

Total: \$82.50

<input type="text" value="Promotional Code"/>	<a href="#">Apply</a>
✓ Applied Promotion: "OMSSALE"	

Promo code as seen during checkout process

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

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# User Modifiers

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

- ▼ OMS
  - Settings
    - Accounting Codes
    - Users
    - Tax Account Codes
  - ▼ Stores
    - Add New Store
    - ▶ HMC PDNE
  - ▼ Merchant Services
    - ▼ Store Settings
      - General
      - Status Management
      - Email Messages
      - Text Messages
      - Single Store
      - Store Template Setup **NEW!**
      - Point of Sale
      - Users
      - Payment Methods
      - Shipping Classes
      - Categories
      - Products
      - Allowed Groups
      - Group Payment Methods
    - Promotions
    - User Modifiers
    - Tax Method
    - Tax Account Codes
  - Order Search
  - Fulfill Orders
  - GL Exceptions (0)
  - ▶ uPay Sites

## Merchant Services User Modifiers

Print Page 

Modifiers can be configured for information collection about the buyer.

### Add Modifier

Type	Example
Drop-Down Selection	Example Optional   Example Required
Text Entry	Example Optional   Example Required
Multiple Select Checkboxes	Example Optional   Example Required

### Add Modifier Group


Type	Example
Table Builder	Example

### Marketplace Point of Sale

Allow user modifiers to appear in Marketplace Point of Sale:  Yes  No

Save

### Current Modifiers

Name	Sort Key	Type	Format <a href="#">What is this?</a>	Actions
Example User Modifier		Optional Text Entry	Free Text Minimum: 0 Maximum: 1000	Edit   Remove

Save Sort

## Merchant Services Buyer Information

Please enter the Buyer Information requested for Merchant Services.

Example User Modifier

(100 characters maximum)

Continue

# Resources

## Office of Merchant Services

Kevin Doar

Director

<https://finance.uw.edu/merchant-services/>

Melissa Hall

eCommerce Manager

<https://finance.uw.edu/merchant-services/ecommerce>

[pcihelp@uw.edu](mailto:pcihelp@uw.edu)