TouchNet Marketplace uStore

A guide to setting up a uStore
Table of Contents

• What is the TouchNet Marketplace?
• What is TouchNet Marketplace uStores?
• What should I consider when requesting a uStore?
• How much will a uStore cost?
• How do I request a uStore?

• How do I setup my uStore?
• How do I manage my uStore?
What is the TouchNet Marketplace?
TouchNet Marketplace

TouchNet Marketplace is a comprehensive payment platform, fully certified with the Payment Card Industry Data Security Standard as PCI DSS and Payment Application Data Security Standard (PA-DSS) compliant. The Touchnet® Marketplace™ is fully integrated with our PeopleSoft and Workday systems, posting daily transactions to each application. TouchNet Marketplace provides three different PCI compliant applications to WSU.

- TouchNet uStores
- TouchNet uPay
- TouchNet Marketplace POS
TouchNet Marketplace

**TouchNet uStores**
Marketplace uStores let students, parents, alumni, etc. shop online, register for events, or make donations anytime, anyplace. As they do, Marketplace automatically updates the G/L accounts in the campus finance system.

**TouchNet uPay**
uPay provides current web applications with a secure, PCI-compliant payment processing that moves campus-wide payments into one centralized, certified payment system. uPay collects all the payment information in a secure environment, updates the G/L, and returns it to the original app.

**TouchNet Marketplace POS**
Mobilize your POS to wherever you need it and accept secure in-person payments anywhere on or off campus including conferences, camps, sporting events, donations, dues, parking and more. MPOS uses the latest mobile payment technology to deliver unparalleled capabilities in a user-friendly way.
What is TouchNet Marketplace uStores?
The WSU Online Store provides campus departments and organizations a secure and convenient e-commerce solution via an online payment portal for credit card transactions. The WSU Online Store connects buyers and sellers, making it convenient for WSU’s customers to shop online, register for events, and purchase campus services at any time.

Each StoreFront created within the WSU Online Store can support a wide variety of online activities including events, summer camps, training, and merchandise.

- Each StoreFront is designed to meet the department or organization’s needs.
- The departmental staff in specific roles will have the ability to view daily business, process refunds, manage inventory, reconcile revenue, and run real time reports.
- Each StoreFront can track inventory, allow for recurring payments, and calculate sales taxes.
- The WSU Office of the Bursar will create new StoreFronts after the WSU department has completed the application and the campus controller has approved it.
How much will a uStore cost?
uStore Packages

The Bursar has developed four packages that a department can choose from when submitting their application. Each package has a setup fee and an ongoing maintenance fee. These fees are designed to ensure that proper support can be provided to departments using uStores.

It is important to identify the number of products & categories your store will have. This impacts the setup cost and yearly maintenance fee. The Bursar will regularly validate that your store fits within the package you purchased. If you exceed the allowed products and categories provided in the package additional fees will be assessed based your application agreement.
uStore Packages & Costs

Crimson
• $1,000.00 set up fee
• $500.00 maintenance fee
• Unlimited categories & products

Gray
• $500.00 set up fee
• $250.00 maintenance fee
• Up to 20 categories & products

Silver
• $750.00 set up fee
• $350.00 maintenance fee
• Up to 50 categories & products

Butch
• $100.00 set up fee
• $100.00 maintenance fee
• Available to student organizations only
What should I consider when requesting a uStore?
Items to consider

When constructing a uStore it is important to discuss and determine the following information before submitting your application.

• What will my store be called?
• 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?
How do I request a uStore?
uStores Request

uStores can be requested by submitting an application in Workday beginning 3-7-2022. If you would like to submit an application prior to 3-7-2022 please email bursar.touchnetadmin@wsu.edu

Once a uStores request has been approved the store will be created in the test environment. You will then be able to setup your test store, products and access. The Bursar office will provide production access once the test store has been setup and test transactions have been completed.
How do I setup my uStore?
uStore Setup – Logging In

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/central

If you do not have TouchNet login credentials or have been locked out of your account, please contact: bursar.touchnetadmin@wsu.edu
uStore Setup

Throughout the editing process, you can view your store as the customer will see it from the Marketplace Operations Center Home.
# uStore Setup – General Settings

In the TEST Environment you can use either “Enable” or “Preview” to view your site.

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

## WSU Test Store General Settings

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

<table>
<thead>
<tr>
<th>General Settings</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Store Id:</strong></td>
<td>10</td>
</tr>
<tr>
<td><strong>Store Name:</strong></td>
<td>WSU Test Store</td>
</tr>
<tr>
<td><strong>Show the Store Display Name on Store Home Page:</strong></td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Store Display Name:</strong></td>
<td>WSU Test Store</td>
</tr>
<tr>
<td><strong>Store status:</strong></td>
<td>Preview</td>
</tr>
</tbody>
</table>

### Applies only to this store and products Management Status

| Time Zone: | Pacific Standard Time - PST/PDT (-8:00) |

## Donation Notification

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

| Email address: |          |
**uStore Setup – General Settings**

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

<table>
<thead>
<tr>
<th>Email addresses:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>(500 chars max)</td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Email addresses:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>(500 chars max)</td>
<td></td>
</tr>
</tbody>
</table>

**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 Types: [ ] Yes [ ] No
- Require shopper acknowledgment of return policy: [ ] Yes [ ] No
- Accounting code is required to complete updates to the General Ledger:
- [ ] Yes [ ] No
- Perform General Ledger Updates: [ ] Yes [ ] No
- Default Accounting Code: 

**Continue Shopping Button Settings**
To configure where the Continue Shopping button in the Checkout pages takes an end user, select a value in the drop down list below.

<table>
<thead>
<tr>
<th>Continue Shopping Button settings:</th>
<th>Use Default Settings</th>
</tr>
</thead>
</table>

**IMPORTANT**: Notification fields are intended to notify store staff not customers.

**IMPORTANT**: If your store will be selling digital products and you do not have enough available space, please contact the Bursar’s Marketplace team.

Please leave these general admin settings as is. If you have a question or would like to change them please contact the Bursar’s marketplace team.
uStore Setup – Email Messages

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

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

The additional announcements can be used to provide additional information on the email notification that the customer receives on each event (Order, fulfillment, cancel or refund).

IMPORTANT: When adding any information to the email messages we ask that you test each message in the test environment so you understand what the customer will receive.
uStore Setup – Email Messages

Example of the confirmation an individual sees at checkout and the email they receive.

Order Receipt TEST

Order 49
Store: WSU Test Store
Date/Time: February 18, 2022 11:30:58 AM PST
Total: $45.00

Billed To:
Brant Schroeder
515 Panorama Drive
Moscow, ID 83843
United States

Contact Email:
brant@wsu.edu

Payment Information:
Payment Type: Credit Card
Credit Card Number: (redacted)
Reference Number: 20220218000000
Card Type: Visa
*** Card Not Present ***

Shipping Information:
Shipping Information 47
Delivery Method: None

<table>
<thead>
<tr>
<th>Item</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Detail Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example Product</td>
<td>1</td>
<td>$50.00</td>
<td>$45.00</td>
</tr>
<tr>
<td>Name: Test Are you a student?: Yes Student ID: 6555555555</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Subtotal: $45.00
Tax: $0.00
Total: $45.00
uStore Setup – Text Messages

Customers will have the option to opt in to receive text messages. You can adjust the message that they receive in the text messages section.

**WSU Test Store Text Messages**

Change the text of text messages that your users receive. The information defined here for content included in text messages is only used in uStores and the Op Center.

<table>
<thead>
<tr>
<th>Text Message Usage</th>
<th>Text Message Subject Line</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order Confirmation</td>
<td>Order Confirmation</td>
<td>Edit</td>
</tr>
<tr>
<td>Order Fulfillment</td>
<td>Your On-line Order</td>
<td>Edit</td>
</tr>
<tr>
<td>Order Cancellation</td>
<td>Order Cancellation</td>
<td>Edit</td>
</tr>
<tr>
<td>Refund Processed</td>
<td>Refund Processed</td>
<td>Edit</td>
</tr>
</tbody>
</table>
You will need to configure the single store settings. Here you can choose if you would like your store to be visible in the mall (WSU's store that will be promoted to everyone).

**IMPORTANT**: If you would like to use promotional codes you will need to specify that here. You will configure promotional details in a separate location.
# uStore Setup – Single Store Settings

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

<table>
<thead>
<tr>
<th>Alternate Text Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>To configure text that will override the button text of &quot;Add to Cart&quot; on the product pages, enter a value below.</td>
</tr>
<tr>
<td>Alternate &quot;Add to Cart&quot; Text:</td>
</tr>
<tr>
<td>To configure text that will override &quot;Shopping Cart&quot; or &quot;My Cart&quot; text that appears throughout the store, enter a value below.</td>
</tr>
<tr>
<td>Alternate &quot;Shopping Cart&quot; Text:</td>
</tr>
<tr>
<td>To configure text that will override &quot;Continue Shopping&quot; text that appears in My Account, Checkout and Receipt pages, enter a value below.</td>
</tr>
<tr>
<td>Alternate &quot;Continue Shopping&quot; Text:</td>
</tr>
<tr>
<td>To configure text that will override &quot;Checkout&quot; text that appears during Checkout, enter a value below.</td>
</tr>
<tr>
<td>Alternate &quot;Checkout&quot; Text:</td>
</tr>
<tr>
<td>To configure text that will override &quot;Order&quot; text that appears throughout the application, enter a value below.</td>
</tr>
<tr>
<td>Alternate &quot;Order&quot; Text:</td>
</tr>
<tr>
<td>To configure text that will override &quot;Buyer&quot; text that appears throughout the application, enter a value below.</td>
</tr>
<tr>
<td>Alternate &quot;Buyer&quot; Text:</td>
</tr>
</tbody>
</table>

[Save]
uStore Setup – Store Template Setup

The Designer: Fixed Width template within TouchNet offers greater ability to customize and brand your uStore without needing to know HTML or CSS.
uStore Setup – Store Template Setup

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

- Fly-out Menu Curtain
- Global NavBar
- Single Store Header
- Body Color (White in screenshot)
- Main Content Color (White in screenshot)
- Single Store Name
- Single Store Categories
- Single Store Products
- Single Store Footer
- Shopping Cart
- Search
- Global Footer
Every store needs to have at least one user assigned to the following roles:

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

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

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

**Store Clerks** – Add and edit products in their assigned store and move products among categories.
uStore Setup – Categories

The shopper sees product thumbnail images, short descriptions, names, and prices. This layout works well for stores that don’t contain many products. You can group products in categories to help the shopper quickly find the products that they would like to purchase.

### WSU Test Store Categories

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

<table>
<thead>
<tr>
<th>Add Top-Level Category</th>
<th>Manage Category List</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>Parent Category</th>
<th>Products</th>
<th>Web</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Featured Items - Point of Sale only)</td>
<td></td>
<td>0</td>
<td>N/A</td>
</tr>
<tr>
<td>(Store Home Page)</td>
<td></td>
<td>3</td>
<td>N/A</td>
</tr>
<tr>
<td>New Category</td>
<td></td>
<td>2</td>
<td>Shown</td>
</tr>
</tbody>
</table>

Showing 1 to 3 of 3 entries
uStore Setup – Products

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

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

You can copy one or multiple products at a time.

You can edit a product setting, add options or modifiers by clicking the products name.

You can quickly enable and disable features on each product on the project settings.
uStore Setup – Products

You can quickly add a single product to your store.

Depending on the layout of your store 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 lead times or other specialized information you can add those details here.
You can create shipping classes for your store and choose which class to apply to your product here.

**IMPORTANT:** Make sure you use the proper tax rate. If you have questions about tax rates please contact the Bursar’s Marketplace team.

Access to purchase products can be restricted. This can allow you to sell something online to specific individuals.
uStore Setup – Products

Adding a single product continued.

IMPORTANT: Good images help sell a product. Make sure you provide good imagery and that the images are properly sized.
You can add options to a product. 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.
# uStore Setup – Products

Adding a single product continued.

## Hoodie: Add Product

<table>
<thead>
<tr>
<th>Item for Sale</th>
<th>Price is in USD ($)</th>
<th>Price</th>
<th>Stock Number (Maximum characters 32):</th>
<th>Assign Random Stock #:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hoodie</td>
<td>Set with confirmation</td>
<td>15.00</td>
<td></td>
<td>Yes, Maximum Per Order:</td>
</tr>
</tbody>
</table>

**Limit Quantity:**
- Yes, Maximum Per Order: 
- No

**Track Inventory:**
- Yes, Initial Inventory: 
- No

**Out of Stock Message:**
- Yes, Out of Stock Message: 
- No

**Low Inventory Notification:**
- Yes, Low Inventory Notification Quantity: 
- No

**Back Orderable:**
- Yes

**Product Notification:**
- Yes

---

**Set the price and stock number. Stick numbers should be unique.**

**You can limit the quantity that an individual customer can purchase on each order.**

**You can set and track inventory. You can prevent sales of items when the inventory reaches zero or get notifications when it is low. If you are using uStores with Marketplace POS you can track inventory sold in-person and online to easily know what your true inventory is.**
uStore Setup – Products

Adding a single product continued.

You can enable a product when you add it or schedule it for a later date.
uStore Setup – Products

Adding a single product continued.

Choose the mall categories and store categories you would like the product to appear in.
**uStore Setup – Products (Options / Modifiers)**

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

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

---

**Hoodie: Product Settings**

**General Settings**

<table>
<thead>
<tr>
<th>Id:</th>
<th>47</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type:</td>
<td>Generic</td>
</tr>
<tr>
<td>Name: (200 chars max)</td>
<td>Hoodie</td>
</tr>
<tr>
<td>Items for Sale (1):</td>
<td>View</td>
</tr>
<tr>
<td>Modifiers:</td>
<td>Add Modifier</td>
</tr>
<tr>
<td>Web status:</td>
<td>Enabled</td>
</tr>
</tbody>
</table>

Is this item eligible for the invoice / payment method?  
- Yes  
- No
To set up Options, you will first choose your Options, then you will assign them Values.

**Hoodie: Add Options**

- Add options and values associated with a product. Items for Sale are combined option and

- Back To Products  Back to Product Settings

**Options and Values**

Please enter new options and values.

**Option Name (examples: Size or Color)**

<table>
<thead>
<tr>
<th>Option Name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Delete

**Option Values (examples: Small and Large or Blue and White)**

<table>
<thead>
<tr>
<th>Option Values</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

Add
uStore Setup – Products (Modifiers)

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.

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.
uStore Setup – Products

Digital products can be added to your store. Please contact the Bursar’s marketplace team when adding digital products.

The Donation Product Type is used for any product that requires the user to enter a custom amount such as an invoice. I can also be used to collect donations.
Promotional Code offers the opportunity to provide discounts to specific customers or in general. There are 4 types of promotions that you can use.

**IMPORTANT**: Test and validate all promotions in test to ensure your promotion is configured properly. Promotions that are not configured properly can lead to lost revenue.

### WSU Test Store Promotions

Promotions require the buyer to enter a promotional code. When a promotion expires, archive it to reuse its promotional code.

<table>
<thead>
<tr>
<th>Type</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Promotion</td>
<td></td>
</tr>
<tr>
<td>Current Promotions</td>
<td>No Promotions</td>
</tr>
<tr>
<td>Future Promotions</td>
<td>No Promotions</td>
</tr>
<tr>
<td>Expired Promotions</td>
<td>No Promotions</td>
</tr>
<tr>
<td>Promotions that Reached Max Number of Uses</td>
<td>No Promotions</td>
</tr>
<tr>
<td>Archived Promotions</td>
<td>No Promotions</td>
</tr>
</tbody>
</table>
uStore Setup – User Modifiers

A modifier that is not product related. It is used to collect additional buyer information during the checkout process. This is a great way to collect information for event registrations.
uStore Resources

Bursar’s Office
• Carla Perez
• Elizabeth Martin
• Support email: bursar.touchnetadmin@wsu.edu