About this Guide

This guide will provide you with the information you need to successfully use and manage your e-commerce site.
Yale University requires that all departments that accept Payment Card payments while conducting University business comply with Policy 2820 Acceptance of Credit & Debit Card Payments and with any related procedures 2820.PR.01 Payment (Credit & Debit) Card.

This policy and procedure outlines:
- General Policies and Procedures for accepting credit cards
- Standards for safeguarding credit card data
- PCI Compliance Reporting Requirements

It is the departments’ responsibility to be keep abreast of this policy and ensure adherence by all staff members.
Yale University has selected TouchNet as its eCommerce solution. TouchNet is the leading provider of integrated, comprehensive and secure commerce and credentials solutions for colleges and universities.

**TouchNet Marketplace**

TouchNet Marketplace is a self-contained e-commerce solution that 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 customers to do business with the campus. Customers can use the uStores & uPay sites to browse store contents, make purchases, take donations, and pay for event registration fees.

**PAYMENT CENTER**
PCI-compliant payment platform

**MARKETPLACE**
Easy online storefront creation for campus entities

**MANAGEMENT DASHBOARD**
The data you need to effectively manage your e-commerce site

**TRANSACTION SERVICES**
Payment processing tailored for Higher Ed

**uStore**
Online stores that can be set up for campus departments and organizations.

**uPay**
Online payment pages can be connected to your existing web applications and web sites.

**Point-of-Sale**
Secure technology for in-person payments anywhere on or off campus for conferences, camps, sporting events, donations, dues, and more.
Accessing Your ePAY Site
Management Dashboard
## Log-in. Process Summary

### To reach your Marketplace Management Dashboard:

<table>
<thead>
<tr>
<th>Open your browser</th>
<th>Use:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Google Chrome</td>
</tr>
<tr>
<td></td>
<td>• Firefox</td>
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<tr>
<td></td>
<td>• Safari</td>
</tr>
<tr>
<td></td>
<td>• Microsoft Edge</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Don't Use:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Internet Explorer</td>
</tr>
</tbody>
</table>

Enter TouchNet URL in your browser’s address field • The Login page appears

Enter your user name and password • The uCommerce homepage will appear

From the top menu click on: • The Marketplace homepage will appear.
>Applications
>Marketplace

This is your management dashboard.

*To learn more, review Login Instructions Detail on pages 7-9*
**U.Commerce: Login**

**LOGIN TO THE TOUCHNET U.COMMERCE SITE**

- Enter the U.Commerce URL in your browser’s address field: [https://secure.touchnet.net/central](https://secure.touchnet.net/central)

- The login page for U.Commerce appears:

![Login Page]

- Enter your username and password and select the Login button.

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**Browser Information**

Use Google Chrome, Firefox, Safari, or Microsoft Edge when accessing the web-based TouchNet U.Commerce suite of products and services.

Internet Explorer is not recommended.

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**Where do you get your URL & login credentials?**

The eCommerce Manager will provide you with your login information including:

- Production URL
- Username
- Password
The top navigation bar shows all the U.Commerce products that are available for you to use.

From the top navigation bar:
Select Applications>Marketplace
The Marketplace Operations Center Home Page will now load.
Marketplace Structure

In Marketplace the Merchant is a department or other campus entity (such as a campus organization) that needs to process payments. Each Merchant can have one or more stores and one or more uPay sites. This example shows the left navigation menu after stores and uPay sites have been added to a merchant.

Marketplace User Roles & Permissions

<table>
<thead>
<tr>
<th>User Role</th>
<th>Permissions &amp; Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Merchant Manager</td>
<td>• Manages the merchant’s configuration settings</td>
</tr>
<tr>
<td></td>
<td>• Adds stores to a merchant</td>
</tr>
<tr>
<td></td>
<td>• Assigns store managers to stores and uPay site managers to uPay sites.</td>
</tr>
<tr>
<td></td>
<td>• Adds uPay sites to a merchant.</td>
</tr>
<tr>
<td>Store Manager</td>
<td>• Manages store settings, such as the store images, store categories, store payment methods, and shipping rates.</td>
</tr>
<tr>
<td></td>
<td>• Assigns store clerks, store accountant, and fulfiller users (including a fulfiller with refund/cancel rights).</td>
</tr>
<tr>
<td></td>
<td>• Adds and edits products.</td>
</tr>
<tr>
<td></td>
<td>• Creates store promotions.</td>
</tr>
<tr>
<td>Store Clerk</td>
<td>• Adds and edits products.</td>
</tr>
<tr>
<td></td>
<td>• Moves products among categories.</td>
</tr>
<tr>
<td>Store Accountant</td>
<td>• Views reports</td>
</tr>
</tbody>
</table>

This merchant is named Alumni.

This merchant has three stores ...

and two uPay sites.

KEY CONCEPT

After launching the Marketplace Operations Center, your assigned role or roles will determine what you can do within Marketplace.

Information about your assigned roles will be provided to you by your eCommerce Manager.

Marketplace users can be assigned multiple roles as necessary. For example, a merchant manager can assign themselves the role of store manager.

Most store users will be assigned the Store Accountant role.
The Marketplace Operations Center is your Management Dashboard. This page:

- allows you to get to key pages quickly
- displays statistics for all the stores and uPay sites available to the user

2. The left navigation menu provides navigation within the Marketplace Operations Center. The left navigation menu displays only those functions that are available to you, depending on your user rights.
3. The top right menu provides links for Edit My Profile and Logout.

Mall Link and Search Section

- **View Mall**: Used to launch the uStores mall.
- **Order or System Tracking**: Provides search functionality for ALL stores and uPay sites that the user has access to. Enter the search criteria and select the Search button.
- **Advanced Search**: Search using additional search criteria.

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

- **Show**: Set number of stores to display in this table.
- **Search**: Easily locate specific stores.
- **Name**: Select the store name to go to the Store General Settings page.
- **ID**: The store ID number.
- **Template**: Identifies the Designer Fixed Width template as your active template.
- **Type**: Identifies whether a store is in mall mode (General) or single-store mode (Single). Mall-mode stores will appear without single store customizations.
- **Merchant Name**: Identifies the merchant for the store to guide you in finding the store in the left navigation menu (which is arranged by merchant).
- **Web**: Indicates the status of the store: Enabled (the store is online), Disabled (the store is offline), and Preview (the store is in preview mode). You can change the status of stores by using the Gear column dropdown menus.
- **Fulfillments Pending**: This column displays the number of pending fulfillments for each store. (If you have the fulfillment role, selecting the number in this column will bring you to the Store Fulfillments page).
- **Links**: Select the View Store link to launch uStores and display the selected store. For stores in PREVIEW mode, select the View Store Preview to view the store in preview mode.

**For Store Manager roles, the Gear allows you to change the status of stores. The dropdown menu provides three status selections:**

1. Enable: shoppers can shop at the store
2. Disable: shoppers cannot shop at the store; the store will not appear in the uStores mall
3. Preview: shoppers cannot shop at the store; however, a store manager can use the View Store Preview link in the Links column to launch the store and view its home page, categories, and products.

To change the status of multiple stores, select the checkboxes in the far left column and then using the Gear dropdown menu in the column heading.
Marketplace Operations Home Center

MARKETPLACE HOME PAGE:
uPay Sites Section

List of all the uPay sites for which you have access 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.

Show  
Set number of uPay sites to display in this table

Search  
Easily locate specific uPay sites.

Name  
Select the store name to go to the Store General Settings page.

ID  
The uPay site ID number.

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

Uses T-Link  
This column provides a simple Yes/No answer to the question "Does the uPay site use T-Link?"

Merchant Name  
Identifies the merchant for the uPay site to guide you in finding the uPay site in the left navigation menu (which is arranged by merchant).

Partner Name  
Identifies the TouchNet Ready Partner associated with the uPay site. This value can be selected on the uPay Payment Settings page.

Transactions  
This column displays the number of transactions processed for the current day. Clicking on the number will display the uPay Payment Search page.

Web  
Indicates the status of the uPay site: Enabled (the uPay site is online), Disabled (the uPay site is offline). You can change the status of stores by using the Gear column dropdown menus.

Gear  
Provides dropdown menus that allow you to change the status of uPay sites. Two status selections are:
1. Enable: site is available for payments
2. Disable: site is not available for payments
To change the status of multiple uPay sites, select the checkboxes in the far left column and then using the Gear dropdown menu in the column heading.
From your home page, select the Edit My Profile link in the left navigation menu to view your user profile.

**USER INFORMATION**
- The Update Profile page includes your name, your e-mail address, and your notification settings.

**EMAIL INFORMATION**
- The Email Information section allows you choose which e-mail address to use with Marketplace.
  - Select "U.Commerce Email" to use the email address configured with your U.Commerce account or
  - Select "Email" to enter a new email address

**STORE NOTIFICATIONS**
- Allows you to specify whether you would like to be notified when orders are placed from stores in which you have the role of fulfiller or store manager.
  - To be notified when an order is placed:
    - select the checkbox beside the store name
    - click the Update Store Notifications button.

**UPAY SITE NOTIFICATION**
- Allows you to specify whether you would like to be notified when uPay payments are placed with uPay sites for which you have the role of site manager.
  - To be notified when a transaction takes place for a specific uPay site:
    - select the checkbox beside the uPay site name
    - click the Update uPay Site Notifications button.

The Store & uPay notification features are useful when you have a store or uPay site with low volume and don't want to log in every day just to see if orders were placed.

When notification feature is turned on for a specific store or uPay site, you will receive a separate e-mail message for every order.