Getting Started
TouchNet Marketplace
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.

- **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
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>
</tr>
<tr>
<td></td>
<td>• Safari</td>
</tr>
<tr>
<td></td>
<td>• Microsoft Edge</td>
</tr>
<tr>
<td>Don’t Use:</td>
<td>• Internet Explorer</td>
</tr>
</tbody>
</table>

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

| Enter your username and password | The first Multi-Factor Authentication (MFA) screen will appear. |

| Follow the MFA prompts | The U.Commerce homepage will appear |

<table>
<thead>
<tr>
<th>From the top menu click on:</th>
<th>The Marketplace homepage will appear.</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt;Applications</td>
<td></td>
</tr>
<tr>
<td>&gt;Marketplace</td>
<td>This is your management dashboard.</td>
</tr>
</tbody>
</table>

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

• The login page for U.Commerce appears:

  ![Login Page Screenshot]

  Account Login
  Sign in with your username
  🌐 Username
  🌐 Password
  🌐 Forget your password?
  🌐 Login

• Enter your username and password. Your username will contain Yale University’s customer number, C20510, followed by a period and your NetID (ex., C20510.xx555)

• Select the Sign In button.

• The first MFA screen will appear.

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.

Where do you get your URL & login credentials?

The ePAY team will provide you with your login information including:

- Production URL
- Username
- Password

Multi-factor Authentication (MFA)

- When you login for the first time, you will be prompted to set-up your multi-factor authorization credentials (MFA).
  - Refer to MFA Account Setup, p. 8

- After you have set-up your MFA credentials, the login will prompt you to MFA every 24 hours.
  - Refer to MFA Account Setup, p. 9
After sign-in, the first Multi-Factor Authentication (MFA) screen appears.

1. Click the Continue button.

2. Enter the desired email where you will receive the MFA verification code.

3. Click the Send Verification button. The verification code is sent to your email.

4. Check your email inbox for the verification code and enter it in verification code field.

5. Click the Verify code button.

6. The Account Login screen displays your email address, if this is correct click the Continue button.

Note: If you do not receive an email in your inbox, please check your spam folder. If you do not receive the verification code email in 20 minutes, you will need to request another verification code be sent to you.

To resend a new verification code, click the Send new code button.

Once you have received the email with the new code, repeat Step 4.

7. Select the country code from the dropdown menu.

8. Enter a valid phone number that can be used to send a verification code.

9. Click the Send code button to receive a code via text message (SMS), or if you prefer to receive a call, click the Call Me button.

10. Enter the verification code and click Continue.

11. The U.Commerce Central Welcome screen appears.
After sign-in, the first Multi-Factor Authentication (MFA) screen appears.

1. Select the method you would like to use to receive your verification code.

Note:
- If it has been less than 24 hours since you completed the MFA, you will bypass this step.
- From this screen you can also update the phone number or email address that you previously entered when establishing your MFA account. (Follow the steps on the screens.)

2. PHONE - If you selected Phone to receive your verification code, the Account Login screen appears for you to verify the phone number, click Send Code to have the code sent via an SMS (text message) to your phone or click Call Me to receive a voice phone call with the code.

EMAIL - If you selected Email, your verification code is sent to you via an email message.

3. Once your verification code is received, enter it on the Account Login screen and click Enter.

4. The Account Login screen displays the email address or phone number where the code was sent, click Continue.

5. The U.Commerce Central Welcome screen appears.
From the top navigation bar: Select Applications>Marketplace

The Marketplace Operations Center Home Page will now load.
## Marketplace – User Roles

### Store User Roles & Permissions

<table>
<thead>
<tr>
<th>User Role</th>
<th>Permissions &amp; Responsibilities</th>
</tr>
</thead>
</table>
| **Store Clerk**      | • Adds and edits products.  
                        | • Moves products among categories.                                 |
| **Store Accountant** | • Views Marketplace financial reports                               |
| **Fulfiller**        | • Fulfill orders                                                    |
| **Fulfiller with**   | • Fulfill orders  
                        | • Refund orders  
                        | • Cancel orders                                                  |

### uPay User Roles & Permissions

<table>
<thead>
<tr>
<th>User Role</th>
<th>Permissions &amp; Responsibilities</th>
</tr>
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</table>
| **Payment Clerk**       | • Search for payments  
                        | • Cancel/refund payments                                            |
| **Store Accountant**    | • Views Marketplace financial reports for uPay site                |

**Note:** Accountants cannot make any changes to uPay site settings or assign user roles.

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### 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 the ePAY team.

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 for all Stores and uPay sites available to the user.

U.Commerce Central

Home | Dashboard | Applications | RECON | Client Community | Help
---|---|---|---|---|---
Marketplace Home | System Administration | Student Affairs | Register | Campus Center | Settings | Home | uPay Sites | Marketplace Reports | Marketplace Exceptions | Device Manager | Edit My Profile | Help


The top right menu provides links to Edit My Profile, make Password change, & Logout.

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.

The left navigation menu provides navigation within the Marketplace Operations Center based on your assigned user rights.
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.
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 to 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.