UNIVERSITY OF DAYTON
e-Commerce Solutions

TouchNet® Marketplace™
- **uStores**
- **uPay**

May 2015

How Do I Use Marketplace?

One of the first decisions that you will want to consider is how you want to use Marketplace. If you already have a self-contained business application, it may make sense to continue to use that business application and link it to a uPay site for collection of the payments. On the other hand, if you are considering whether or not to write a business application, creating a new uStore instead might be a better and faster option. A key component in this decision is understanding the difference between uStores and uPay.

What is uPay?

uPay is a PCI Compliant payment application that allows you to take payments via the web from an existing website. uPay focuses on payment collection and payment reporting while your business application provides the core business functionality including things like, managing inventory or registrations. To use this, you must have an existing website and you must have access to modify the programming. Examples of business applications currently using uPay at the University of Dayton include Flyer Express deposits, admissions deposits, and payment of library fines. If you have a Cascade website, there is a ready-to-use uPay form that can be added to a page for initiating the payment process.

Content Options

After your application has been accepted, the MarketPlace Team will contact you to request detailed information for setting up the uPay account. Please be prepared to provide:

- uPay transaction amount(s)
- prompts for user-supplied unique identifier;
- refund policy

Explanation of Content Options
uPay Content Options:

- uPay transactions can have one of these payment amounts:
    - pre-determined payment amount(s)
    - user-entered payment amount,
    - payment amount passed from an external application

- You can collect one item of unique identification information from the user, such as a name, invoice #, or an ID#. This unique identifier will help you match payments to your records.

What are uStores?

uStores, also PCI Compliant, is a self-contained online store where you can sell products, take conference registrations, or disseminate electronic media using only the Marketplace tools. You do not need a web site or any programming expertise. Through Marketplace you create an online store which appears as a web page to your customer. You are able to establish store specific settings and products, along with all online store activity such as order fulfillment and reporting.

To view uStores at the University of Dayton: secure.touchnet.com/C20221_ustores/web/

uStores can be used in many ways such as, selling traditional products like school apparel or selling non-physical products such as conference attendance. Here are a few ways that other schools have used uStores:

- Conference and/or Camp Registrations
- Donations
- Parking Passes
- Cafeteria services (such as birthday cakes for students)
- Parking fines
- Coordinating the issuing of non-chargeable events such as Graduation tickets

In uStores, products are categorized into three types:

- **Donation products** are those which do not have a set payment amount and allow the buyer to provide the amount they wish to pay. Donation products can be configured to be one time payments or recur based on a schedule. Donation products also have the option of notifying users designated by the store manager when a donation is received.

- **Digital products** are those where a digital item can be purchased and then downloaded directly from the uStores. A digital item could be a WAV file of your school's school song or it could be a recording or other computer file available to your students.

- **Generic products** are all other products. These could include physical products such as apparel or non-physical products such as conference attendance. Most products typically fall into the Generic type.

Content Options

After your application has been accepted, the MarketPlace Team will contact you to request detailed information for setting up the uStore account. Please be prepared to provide:
- uStore item descriptions and prices;
- uStore landing page content;
- uStore splash and optional thumbnail images;
- prompts for user-supplied information;
- refund policy

Explanation of Content Options

uStoreContent Options:
- Your uStore landing page provides space for descriptive information (no character limit) and a "splash" image up to 920 pixels in width.
- Each "item" in the store can have a thumbnail image (80 pixels x 80 pixels) and a description up to 500 characters. Each item can also have fill-in fields (text entry, checkboxes, and dropdowns) to collect additional user-supplied information (no limit).
- Items can be "free" with an assigned price of $0.
- Each payment transaction can have fill-in fields (text entry, checkboxes, and/or dropdowns) to collect additional user-supplied information (100 characters per item).

Refund Policy Options
- No refunds
- Partial refunds; Examples:
    - Cancel within 14 days eligible for xx% return. Cancel within 7 days eligible for xx%.
    - The registration fee, less a $x.xx handling charge, will be refunded if cancellation is received by dd/mm/yyyy. There will be no refunds after that date.

Can I Take Credit Card Payments from Packaged Software?

You may have acquired your website, and the supporting software, by purchasing it from another vendor. That vendor may offer their own credit card processing but you may still be able to use uPay. The advantage? Using the TouchNet uPay system is the least expensive way to process payments.

Currently there are several ways that TouchNet can accept a transaction from a 3rd party vendor including:

Secure TLink Integration with a uPay site. This applies to TouchNet Ready Partners. These are vendors that have completed the integration and provided a certificate to TouchNet for use with their application. The current list can be found on the TouchNet site at www.TouchNet.com

Regular uPay Site. This applies if the vendor has not yet completed the integration or is not planning on doing so. In this case, your school and the vendor are responsible for working together to modify their business application as necessary to call and pass information to uPay, as well as, handle any updates to their business application.

Web Service to the Payment Gateway. This applies if the vendor has been certified with the TouchNet Web Service program. In this case, the vendor collects the payment information in their business application and passes it to the Payment Gateway via a Web Service. This type of transaction is actually completed outside of Marketplace and would be associated with our TouchNet Payment Gateway application.

It is not always possible to incorporate uPay onto a vendor supplied website. The vendor has to be willing to add this function to their software.

How do we access the funds?

Today, the funds associated with credit card payments are transferred to General Ledger accounts through the Office of the Bursar. They review the transactions daily and create General Ledger transfer transactions. Once we go-live with Banner Finance, Marketplace will automatically update the Banner General Ledger system for both uStores and uPay transactions. This update takes the form of a real-time transaction when the uStore order is fulfilled or uPay payment taken. The update takes place via TouchNet's Banner Connect module and the transaction is added to the Miscellaneous table (TBRMISC) where it is later transferred to the Banner Finance module using our existing Banner procedures.

What reports will I see?

You will have login access to view transaction information in your uStore or uPay account. Transaction reports can be downloaded as CSV files. These are the available reports:

uPay
- # Of Credit Card Transactions
- Total $ Credit Card Transactions
- # Of ACH Transactions
- Total $ ACH Transactions
- Total # Of Transactions
- Total Revenue

uStores: Totals (no detail break-down)
- Store Name
- # of Fulfillments
- # of Items Sold
- Item Amount
- Shipping Amount
- Item + Shipping Amount

uStores: By Product
- Product Name
- Order Id
- Purchaser
- Date Ordered
- Date Fulfilled
- Qty Fulfilled
- Payment Method
- Total Amount Paid
- User-supplied product info
- User-supplied buyer info

uStores: Buyer Information
- Order Id
- Purchaser
- Date Ordered
- Payment Method
- User-supplied buyer info

How Do I Get Started?

Complete the attached E-Commerce User Agreement and Touchnet Marketplace Application and send it to UDit Web Services, +2230, or FAX to 229-4044. Have questions? Email webservices@udayton.edu

E-Commerce User Agreement

This agreement covers the use of the University of Dayton and TouchNet Information Systems supporting online credit card and ACH transaction system known as Marketplace, uPay, and uStores. Please read the following user agreement, and sign below.

Fees

- The credit card processors and the banks charge fees for using their payment networks. The exact fee varies by the type of card the customer uses (rewards, corporate, etc.) and consequently changes from month to month. It generally ranges from 2-4% of the transaction amount. Currently, those fees are absorbed through central funds.
- You acknowledge that it is your responsibility to cover the cost of doing business in the price of your goods and maintain sufficient funds in your general ledger account. Any refunds you authorize will be removed from your general ledger account.
- Credit card chargebacks can occur against your account. Chargebacks are credit card transactions that your customer has disputed and has requested a refund. These will also be removed from your general ledger account.

Security

- Access is granted through an assigned user id and password that is different from your LDAP ID and password. You agree to change your password immediately to a secure password, upon receipt of your initial login information. A secure password will be at least 8 characters in length, contain at least one capital letter, one number, and one special character.
- You agree that you will **NEVER** share your user id or password with anyone or allow anyone to use your logged in session at any time.
- You agree to protect information about customers and log out of the Marketplace system if the computer is to be unattended by the authorized user.
- You agree that all refunds will be made in accordance with UD Policies and Procedures with all totals verified before the refund is submitted and you will not attempt to refund in excess of the original amount of the transaction.
- You agree that you will NEVER enter a customer's credit card number into your web store on their behalf or write down or record a customer's credit card information.
- You agree to notify UDit Risk Management immediately if an authorized user changes employment or job responsibilities.

Please sign below and keep a copy of this agreement for your records. Please send this form to Risk Management, UDit, +2230.

User Signature_____   Supervisor Signature _____

Printed Name _____   Printed Name_____

Phone Number _____   Phone Number_____

Department/Office _____

Date _____

TouchNet MarketPlace Application

Return to UDit Web Services: ZIP +2230 or FAX 937-229-4044

Requestor Information:

Contact Name _____ Phone # _____ _____ Email _____

Department _____ Zip + _____

Which Marketplace type:

❑ uPay

❑ uStore

Describe the purpose for the MarketPlace site. _____

Desired go-live date: _____

Site Managers:
Each uPay or uStore can have two site managers who can access reports and process refunds.
NOTE: Each site manager is also required to fill out and sign an E-Commerce User Agreement (attached).

Primary Manager _____ Phone # _____ UD email _____

Backup Manager _____ Phone # _____ UD email _____

Marketplace Accounting Detail Code:
Each MarketPlace site must have an **Accounting Detail Code** for the account/subaccount to which
payment transactions are posted. Contact the Bursar's office to request a TouchNet MarketPlace
Accounting Detail Code. Provide the detail code here:

Accounting Code Detail (from Bursar): _____