eMarket Store Setup

User Manual

Version 3.3 | February 2018

Contact Information

For information and support prior to the deployment process, contact your Cashnet Project Manager.

For post-deployment support, contact Cashnet Support at (800) 231-9182 or support@cashnet.com.

About this Document

Scope

This *eMarket Store Setup User Manual* describes the steps for configuring eMarket Storefront and Checkout stores using CASHNet's new store setup experience.

Audience

This document is intended for client eMarket Administrators who would like to create or modify their own eMarket stores.

This document can also be used by the CASHNet Deployment and Support teams to assist clients in creating and maintaining their eMarket stores.

Additional Information

For a glossary of relevant terms and referenced documents, see Appendix C on page 88.

Contents

1 Getting Started with Store Setup

This section explains some of the major changes as a result of the new store setup experience.

1.1 About the New eMarket Store Setup

CASHNet's new store setup experience streamlines the store creation workflow, enabling users to complete tasks such as setting up merchant codes and information fields directly through store setup.

The store setup experience utilizes more dynamic form fields, improved form field validation, and context-sensitive help, which allow operators to create new eMarket stores with minimal user documentation and previous CASHNet experience.

Note: For a detailed overview of the new store setup experience, see Section 4 on page 30.

1.2 Available Store Types

As of the CE_2016.2 release, you can create the following store types through the new store setup:

- Regular Storefront
- Donation Storefront
- Checkout

Note: Gateway and ePayment stores must still be configured through the old store setup, which is still available for use at this time.

1.3 New Terminology

Most of the individual fields involved in store setup have new descriptions that better explain the purpose of the field and what information is required. All of the fields used to create stores are described in this guide. Also, because fields are now "dynamic," they will be hidden when they are not required based on your previous selections.

In addition, some of CASHNet terms are in the process of changing throughout the CASHNet Administration site, such as:

- **Information field**: Replaces the term "Reference Type," a field used to collect additional information from the payer whether at the transaction or item level.

- **Store**: Replaces the term "Merchant" for an individual eMarket site.
- **Guest User**: Replaces the term "Default Customer Code" for non-authenticated payers.

1.4 Allowable Activity Changes

Many of the allowable activities associated with store setup have been renamed and control specific actions in the new store setup, as explained in the table below.

For additional information on allowable activities associated with eMarket stores, see Appendix B on page 85.

Table 1: New Store Setup Allowable Activities

OLD ALLOWABLE ACTIVITY	NEW ALLOWABLE ACTIVITY	WHAT IT CONTROLS ACCESS TO
Maintain Merchants	Create stores	The **Create store** button and almost everything on the *Create store* page.
Access Store Setup	Access stores	Whether an operator can access only select stores or all stores.
Setup Store Look & Feel	Store layout	Everything on the LAYOUT tab.
Setup Store Business Rules	Store site	Everything on the SITE tab.
Setup Store Technical Rules	Store notifications	Everything on the NOTIFICATIONS tab.
Setup Store Catalog	Store items	Everything on the ITEMS tab except discounts.
Setup Store Discounts	Store discounts	The **Create** discount button. Operators without permission can view but not create or modify discounts.

1.5 New Store Setup FAQs

Q: **Can I still use the "old" store setup?**

A: As of the CE_2016.2 release, the old store setup is still available for use. However, we recommend that you familiarize yourself and your team with the new store setup, as it is the groundwork for upcoming UI changes.

Q: **What browser works best when using the new store setup experience?**

A: The new store setup is optimized for Google Chrome. If you are using Internet Explorer (IE) and run into any issues, please try using Chrome instead.

2 Framework Configuration

Before you can create a new store, you must determine your store type, create the operators who will manage the store, and set up the store's backend framework in CASHNet.

In many cases, your CASHNet Deployment Team will assist in completing some of these steps; however, you may want to verify your store's backend settings or create additional stores on your own.

2.1 Determining Your Store Type

During the initial store configuration (Section 3 page 20), you will need to set the type of the store from the following options:

- **Storefront (regular)**: The entire payment process, from selecting items to paying for them, takes places in the CASHNet environment using CASHNet's eMarket interface.
- **Donation storefront**: The item selection and payment process is the same as a Storefront, but the store is intended to be for donations only, which results in some minor changes in the configuration process.
- **Checkout**: A non-CASHNet front-end interface is being used for item selection and redirecting users to CASHNet to collect the payment information and process the payment.

In most cases, prior to getting started, you will already have determined which type of store you require with your CASHNet Sales Executive or Deployment Team. However, if you need more information about these different options, please refer to the following documents in the CASHNet Support Library:

- *ePayment & eMarket User Manual:* Provides general information about the ePayment and eMarket store options and administrative requirements.
- *eMarket Checkout & Gateway Payment Integration Guide:* Details the integration process for eMarket Checkout and Gateway store types.

2.2 Determining Your Operators

CASHNet has a very flexible permissions system for CASHNet Administrative operators and groups. This section provides background on some of the common permissions used for managing eMarket stores.

In most cases, the CASHNet Administrator operator will perform the Initial Store Configuration as explained in Section 3 on page 20, and the individual eMarket operators will manage the store thereafter.

Although eMarket operators can be created and modified at any time, prior to creating your store, you will want to begin determining how many operators you will need and what level of permissions you want to provide to those operators.

Note: In many cases, eMarket operators may not work in the business office and may not have duties involving CASHNet sites before their eMarket store goes live. However, keep in mind that these users may need the ability to add and remove items, perform refunds, or report on their eMarket stores.

2.2.1 eMarket Operator Groups

By default, there are two main eMarket operator groups, which are explained in the following table.

Note: For additional details on CASHNet groups, refer to the *System Setup User Manual*.

Table 2: eMarket Operator Types

OPERATOR GROUP	PRIMARY DUTIES	STANDARD PERMISSIONS
Store Owner	Maintain an individual eMarket store. May complete the configuration of the store after the initial configuration steps are completed by the CASHNet Administrator/ Deployment.	• Set the look and feel of the eMarket store. • Change store settings. • Modify technical rules regarding which staff members receive notifications how those notifications are sent. • Maintain the store catalog (creating items and adding/removing items from the store). **Note:** By default, Store Owner operators are not able to report on or interact with the transactions from the store.
eMarket Administrator	Administer multiple eMarket stores as well as the ePayment site. May complete the configuration of the store after the initial configuration steps are completed by the CASHNet Administrator/ Deployment.	All of the Store Owner permissions listed above and the ability to: • Reverse transactions and issue refunds. • Report on transactions. • Perform voice authorizations (if applicable). • Run/email/save reports. • Perform cashiering tasks. • Access eBill and Payment Plan information. **Note:** eMarket Administrators are restricted to voiding and

OPERATOR GROUP	PRIMARY DUTIES	STANDARD PERMISSIONS
		refunding only within their department. For this reason, it is important to configure the eMarket Administrator operator in the same department as the eMarket(s) that operator will administer. For more information on departments, refer to the *System Setup User Manual*.

2.2.2 Merchant-Security

In addition to CASHNet's operator groups, CASHNet has a feature called "merchant-security" that enables you to grant permissions to operators so they can maintain multiple eMarket stores with different levels of permission for each store. For details about this feature, see Appendix A on page 81. Note that your CASHNet Deployment Team must enable this feature for you.

2.2.3 Creating Your Store Operators

Note: eMarket operators may not have the necessary permissions to create operators. Normally, the CASHNet Administrator must perform this step.

Note: Some operator fields are skipped as part of the operator setup. If a field is not listed in the instructions below, you can assume it has no effect on the eMarket store.

To create a store operator:

1. In the left-hand menu, click **Operator Setup**.
2. At the top of the operators table, click **Add New Record**.
3. Fill in the operator fields according to the example in Figure 1 and the instructions in Table 3 below.

Figure 1: Example Operator Fields

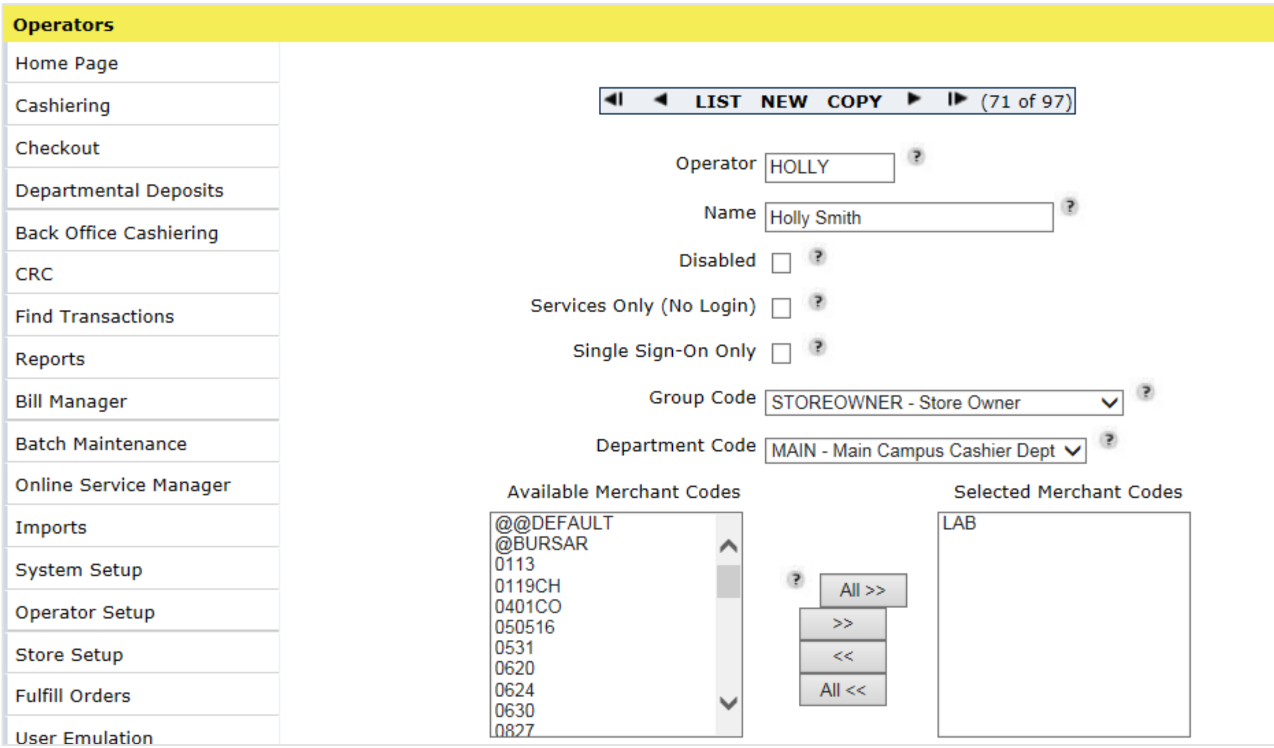


Table 3: Instructions for Operator Fields

FIELD NAME	DATA ENTRY INSTRUCTIONS
Operator ID	Enter a unique identification code. The operator will use this when logging into CASHNet. Once the record is saved, this field may not be edited. (50-character maximum.) **Note:** Often the Operator ID will follow a naming convention at the institution, such as the first part of the email address or the login name for another system. The name should always be the full username that the user will use to log in. Generic or shared logins are strongly discouraged.
Name	Enter the operator’s name that corresponds to the operator ID. (30-character maximum.)
Group	Select a group code for this operator from the dropdown menu of available group codes. **Note:** As explained in Section 2.2.1 above, generally you will select **Store Owner** for users who will not be responsible for any business aspect of the store (i.e., reporting or refunds) and **eMarket Administrator** for users who will have full control over the store. If neither of these groups fits perfectly, you can always add or remove permissions later.

FIELD NAME	DATA ENTRY INSTRUCTIONS
Department Code	Select a department code for this operator from the dropdown menu of available department codes. **Note:** By default, all operators can typically see all transactions processed within the system. However, the system can be configured to restrict reporting to only within a given department or selected eMarket stores. For detailed information, see Appendix A Merchant-Security (p. 81).
Available Merchant Codes / Selected Merchant Codes	Use the arrow buttons to move the merchant codes the operator should be permitted to access into the Selected Merchant Codes box. This will restrict the eMarket operator to only be able to view or modify certain eMarket stores. **Note:** The Operator will have the same access for each store unless Merchant Level Security is enabled. For more information, see Appendix A Merchant-Security (p. 81).
Email	Enter the operator's email address. The operator will receive an email to log in and change their temporary password. (50-character maximum.)

4. If you wish to change any permissions for this operator, click **Show Allowable Activities** at the base of the screen and modify the permissions as needed.

   Note: Some institutions prefer to restrict eMarket Administrators permissions more than the default settings. For a list of permissions generally relevant to eMarket stores, see Appendix B Operator Permissions (p. 85).

5. At the base of the page, click the **Save** button.
6. In the Password page, enter and re-enter a valid operator password.

   Note: This is a default password that the operator will have to change when they first log in. This password typically expires within 24 hours, so encourage the operator to log in promptly.

7. Click **Change Password** to set the operator's temporary password.

2.3 Creating the eMarket Location

The eMarket location controls the credit card and ACH terminals associated with the eMarket store. A location must typically be created for each eMarket store or for a set of eMarket stores that share the same banking information.

Note: eMarket operators may not have the necessary permissions to create locations. Normally, the CASHNet Administrator must perform this step.

Note: Some location fields are skipped as part of the location setup. If a field is not listed in the instructions below, you can assume it has no effect on the eMarket store.

To create the eMarket location:

1. Click **System Setup**.
2. In the Station Information section, click **Locations**.
3. Above the locations table, click **Add New Record**.
4. Fill in the location fields according to the example in Figure 2 and the instructions in Table 4 below.

Figure 2: Example Location Fields

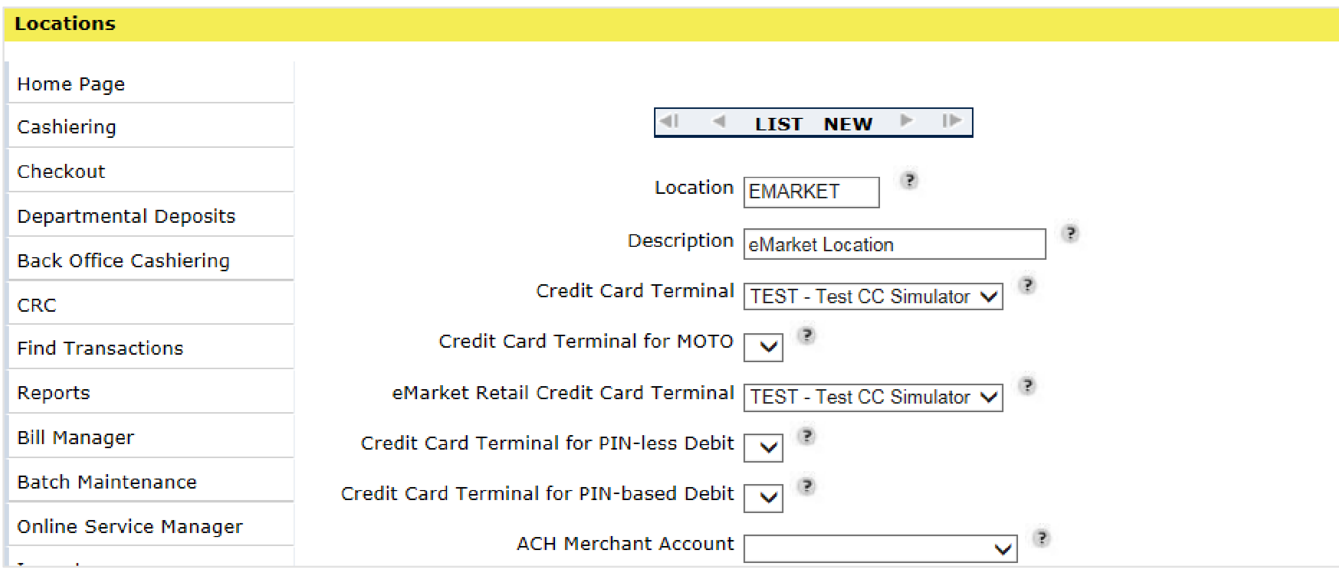


Table 4: Instructions for Location Fields

FIELD NAME	DATA ENTRY INSTRUCTIONS
Location	Enter a name for the location. CASHNet recommends not including spaces. Once saved, this field may not be edited. (10-character maximum.) **Tip:** Location names often match the name of the eMarket store you are creating. If you want multiple eMarket stores to link up to a single location, we recommend that you use a generic name such as `EMARKET` or the institutional department name. As a best practice, the location name should be identifiable as being used with eMarket rather than with Cashiering or ePayment.
Description	Enter a description of this location. (50-character maximum.)
Credit Card Terminal	If this store will be accepting credit cards, select the credit card terminal that will be used from the dropdown menu.

FIELD NAME	DATA ENTRY INSTRUCTIONS
	Note: Prior to going live, the credit card terminal labeled **TEST - Test CC Simulator** should be selected when test credit card transactions are processed. After going live, this value must be changed to the live credit card terminal.
Credit Card Terminal for Moto	**Note:** This field only applies if the store will be used with Assisted Payments. Select the credit card terminal that has been configured to process mail order/telephone order (MOTO) payments.
eMarket Retail Credit Card Terminal	**Note:** This field only applies if the store will be used with the iPad app. Select the retail credit card terminal that should be used when credit cards are swiped in iPad app eMarket transactions.
Credit Card Terminal for PIN-less Debit	**Note:** This field only applies if the institution is using PIN-less debit as tender type. Select the credit card terminal that has been configured to process PIN-less debit payments.
ACH Merchant Account	If this store will be accepting ACH payments, select the ACH merchant account from the dropdown menu. **Note:** Due to NACHA regulations, ACH cannot be offered anonymously and can only be offered when there is a previously established relationship with the end user. This means that most eMarket stores cannot offer ACH. For more details, see Section 2.4 below.
Variable Merchant Name	**Note:** This field only applies if your institution has a direct relationship with Chase Paymentech Salem. The same credit card merchant account may be used for different locations. To differentiate this location from others, follow the formatting instructions online to enter a Variable Merchant Name and/or Item Description to be shown on payers' credit card statements. (22-character maximum.)
Variable City/Phone	**Note:** This field only applies if your institution has a direct relationship with Chase Paymentech Salem. Enter the name of the city for this location to be shown on payers' credit card statements. (13-character maximum.)
Location Zip Code	Enter a zip code for this location. If your system collects sales taxes, this information will be used for calculating sales tax for items that are not configured to collect shipping information. This zip code will also be used to look up the state for comparison to the selected state(s) for the store. (10-character maximum.)
Location Attribute #1[-4]	You have the ability to define up to four additional location attributes

FIELD NAME	DATA ENTRY INSTRUCTIONS
	based on your institution's policies and procedures. These fields are used for extracting purposes. Your Deployment Team will set this up during the deployment process. If locations are added after going live, reference existing locations to see if these fields are in use. (50-character maximum.)

5. At the base of the page, click the **Save** button.

2.4 Determining Your Accepted Payment Tenders

When creating your eMarket store, you will be prompted to indicate which payment tender types are allowed. The following table lists the tender types that may be selected as well as important considerations to take into account before choosing to allow each tender type.

Table 5: Allowable Payment Tenders

PAYMENT TENDER TYPE	IMPORTANT CONSIDERATIONS
Credit card	Most eMarket stores accept credit card payments. Keep in mind that there is only one payment code possible for each type of payment. For example, there is only one payment code for all credit cards—eMarket cannot have a separate payment code for Visa, MasterCard, etc. If your business rules require splitting out the card types for reconciliation purposes, CASHNet reports can be used and sometimes can even be posted back to your general ledger (G/L). You will be able to set separate payment codes for regular credit card payments and those made through automatic payment plans.
ACH	Due to NACHA regulations, ACH cannot be offered anonymously and can only be offered when there is a previously established relationship with the end user. This means that most eMarket stores **cannot** offer ACH. However, if your store will **require** user login, ACH may be allowed. If you have any questions, contact a CASHNet representative. Once you have determined that your institution is permitted to use ACH with your eMarket store, you may still need to confirm that your bank is configured to accept the two ACH methods that eMarket processes: TEL and WEB. Most institutions that have deployed the ePayment module already have at least one of these configured as payment codes. If in doubt, contact your bank and verify that they are prepared to accept these payments types before you activate the eMarket in your production database. You will be able to set separate ACH payment codes for: regular ACH payments, those made through automatic payment plans, those made via assisted payments, and those

PAYMENT TENDER TYPE	IMPORTANT CONSIDERATIONS
	made via assisted payments through automatic payment plans.
International funds transfer	This option is only available if you have purchased IFT.
Purchase order	This option will require you to send your own invoices manually.

2.4.1 Creating Your Payment Codes

If the payment codes for the tender types you will accept do **not** already exist in your CASHNet instance, or, if for some reason you want to use different payment codes specifically for your eMarket store or set of eMarket stores, you must create those payment codes in your CASHNet instance prior to creating the store.

Note: Users often determine that the same payment codes can be used for multiple eMarket stores, since payment codes indicate the payment tender and not where the payment is being taken. The merchant and bank account used to process payments on the back end is determined by the location, not by the payment code.

Note: If you are using existing payment codes, it is a best practice to open those payment codes and verify that the Electronic Pay Type listed is compatible with eMarket stores. The following Electronic Pay Types are permitted: **ACHWEB**, **ACHTEL**, **CC**, **IFT**, **OCBB**, **OCGOLD**, **PBD**, **PDC**, and **PLD**.

Note: Some payment code fields are skipped as part of the payment code setup. If a field is not listed in the instructions below, you can assume it has no effect on the eMarket store.

To create a payment code:

1. Click **System Setup**.
2. In the Payment Information section, click **Payment Codes**.
3. Above the payment codes table, click **Add New Record**.
4. Fill in the payment code fields according to the example in Figure 3 and the instructions in Table 6 below.

Figure 3: Example Payment Code Fields

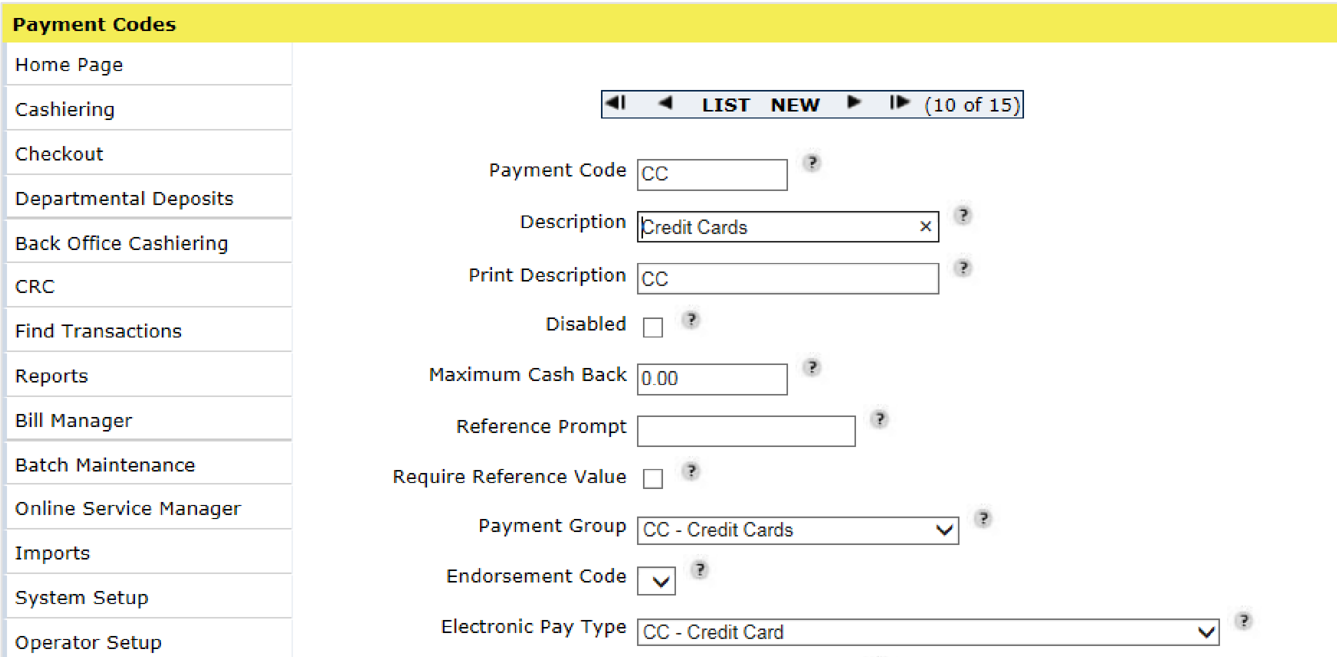


Table 6: Instructions for Payment Code Fields

FIELD NAME	DATA ENTRY INSTRUCTIONS
Payment Code	Enter a name for this payment code. Once saved, this field may not be changed. (12 alphanumeric-character maximum. No spaces allowed.)
Description	Enter a description of this payment code. (50-character maximum.)
Print Description	Enter a description of the payment code that should print on receipts. After text is entered into the payment code Description field, the system will automatically populate this field with the same text. You may enter a different description if desired.
Electronic Pay Type	Select the electronic pay type this payment code represents from the dropdown menu, if applicable. The selection of an electronic pay type initiates a sub-routine that performs such functions as validating a credit card transaction, imaging a check, etc.
Campus Card Plan Number	**Note:** This field is grayed out if your institution is not using campus cards with CASHNet. If the payment code represents a campus card, the value that should be entered into this field depends upon the campus card system. For the new CBORD systems, enter the Code Map value. Different codes can be sent to the CBORD system to indicate an alternate search/specific balance the patron wants to use. A default is used if no value is specified here.

FIELD NAME	DATA ENTRY INSTRUCTIONS
	For BlackBoard (Windows), enter the Stored Value Fund Number. For BlackBoard (Unix), enter the Privilege Number.
Campus Card Location	**Note:** This field is grayed out if your institution is not using campus cards with CASHNet. If the payment code represents a campus card, the value that should be entered into this field depends upon the campus card system. For CBORD CS Gold Classic and CBORD CS Gold, enter the Location Code. For CBORD Odyssey PCS, enter the Terminal Number. For BlackBoard, enter the Terminal Number.
Minimum Amount Allowed	If an amount is defined in this field, any payment made in ePayment or eMarket using the payment code may not be less than the amount specified here. The amount entered into this field must be $10.00 or less, which is the Federal Reserve Board's current limit.
Maximum Amount Allowed	If an amount is defined in this field, any payment made in ePayment or eMarket using the payment code may not exceed the amount specified here.
G/L	If you are extracting the payment code to another system, you may need to enter the G/L information. You may need to consult with your CASHNet representative to determine if this is needed. Enter the general ledger account segment-by-segment, if applicable.
Attribute #1[-4]	You have the ability to define up to four additional payment code attributes based on your institution's policies and procedures. (50-character maximum.) These fields are used for populating certain fields within the CASHNet system real time interfaces or batch files to your ERP system. If you know these values, enter them here. If not, contact a CASHNet representative for assistance. **Tip:** You can sometimes determine what needs to be entered in the Attribute fields by checking other Payment Codes in the CASHNet system.

5. The check boxes above the **Save** button correspond to different real-time and batch extracts within CASHNet that direct your payments through specific interfaces on the way to your ERP. Be very careful when making these selections since using the wrong checkbox could cause errors. Often no checkboxes are selected, as most extracts in the system are determined through item code setup, not payment codes. You can often determine if any of these options should be selected by looking at other payment codes, but a CASHNet representative can give you a definite answer.
6. At the base of the page, click the **Save** button.

2.5 Creating the eMarket Guest Customer

If anonymous payments through the eMarket store will be possible, CASHNet requires you to use a default customer ID. This means that, if you are **not** going to require users to log in to your eMarket Storefront, or not submit a student ID through an eMarket Checkout request, you must configure a guest customer for anonymous payments.

Note: eMarket operators may not have the necessary permissions to create customers. Normally, the CASHNet Administrator must perform this step.

Note: Some customer fields are skipped as part of the customer setup. If a field is not listed in the instructions below, you can assume it has no effect on the eMarket store.

To create the eMarket guest customer:

1. Click **System Setup**.
2. In the Customer Information section, click **Customers**.
3. Click the **Create New Customer** button.

   Note: If this button grayed out, you do not have the permissions necessary to create a new customer.
4. Fill in the customer fields according to the example in Figure 4 and the instructions in Table 7 below.

Figure 4: Example Customer Fields

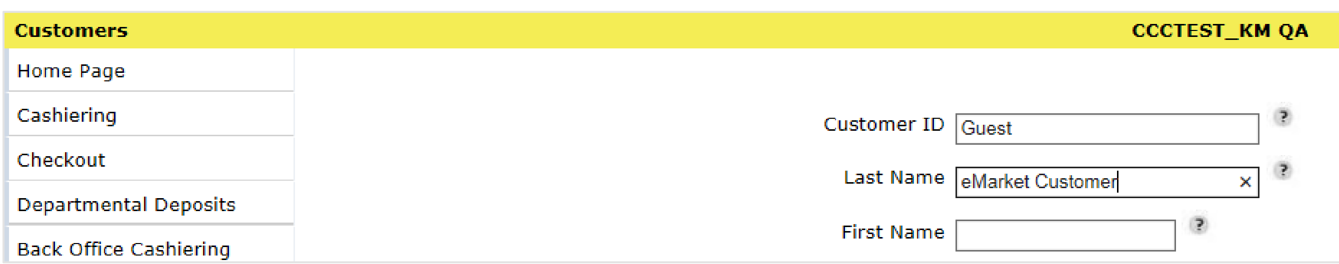


Table 7: Instructions for Customer Fields

FIELD NAME	DATA ENTRY INSTRUCTIONS
Customer ID	Enter a generic ID for the customer. This is typically the same as the eMarket or department using the eMarket.
Last Name	Enter something as simple such as `eMarket User`, `Donor`, or some other value that identifies the type of customer the eMarket serves.

5. At the base of the page, click the **Save** button.

3 Initial Store Configuration

To start a new store, you will access the eMarket store selection page, then set some basic information about the store, including the URL, store type, and the payment options.

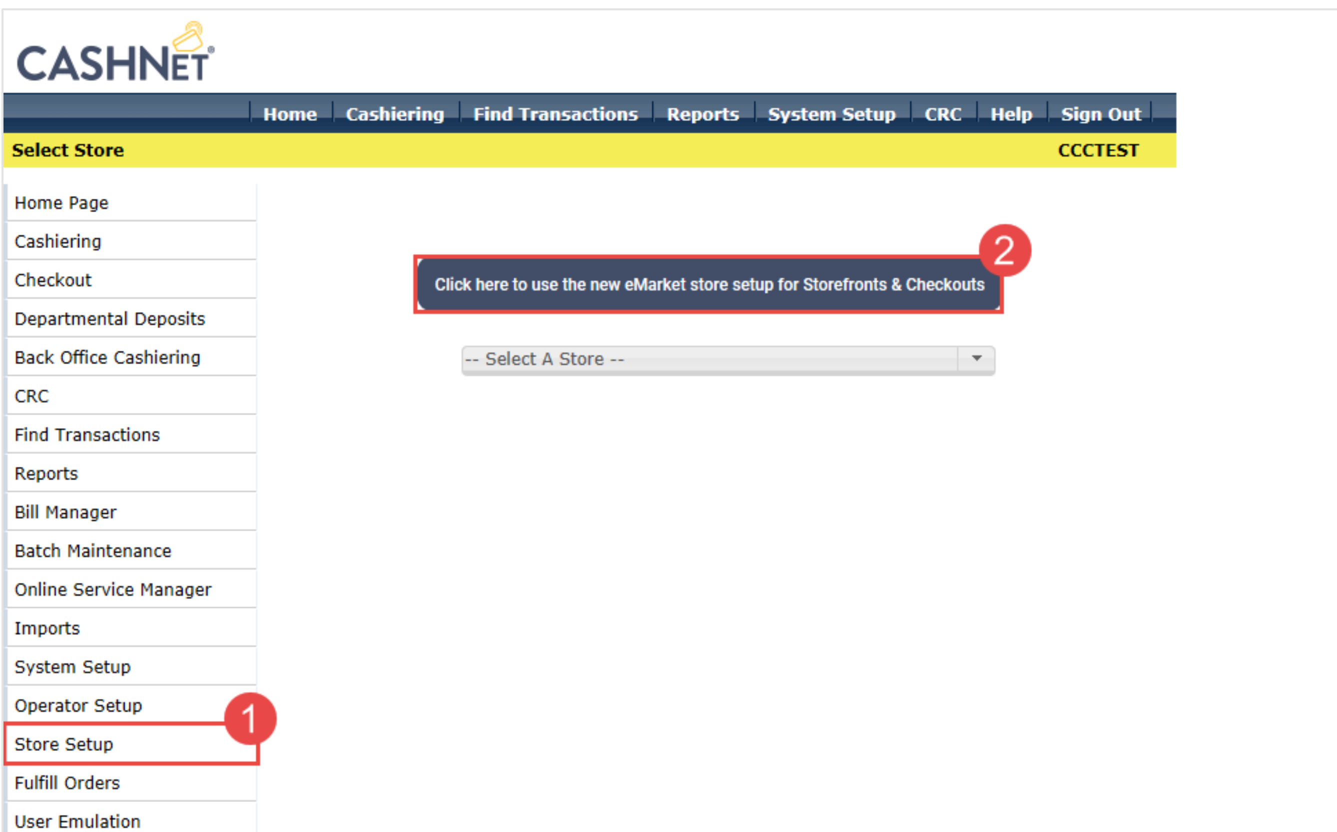
3.1 Accessing the eMarket Store Selection Page

Through the eMarket store selection page, you can both start new stores and access and modify existing stores.

To access the new eMarket store selection page:

1. In the left pane of the CASHNet Administration website, click **Store Setup**.
2. At the top of the page, click the button called **Click here to use the new eMarket store setup for Storefronts & Checkouts**.

Figure 5: Steps to Access the New eMarket Store Setup



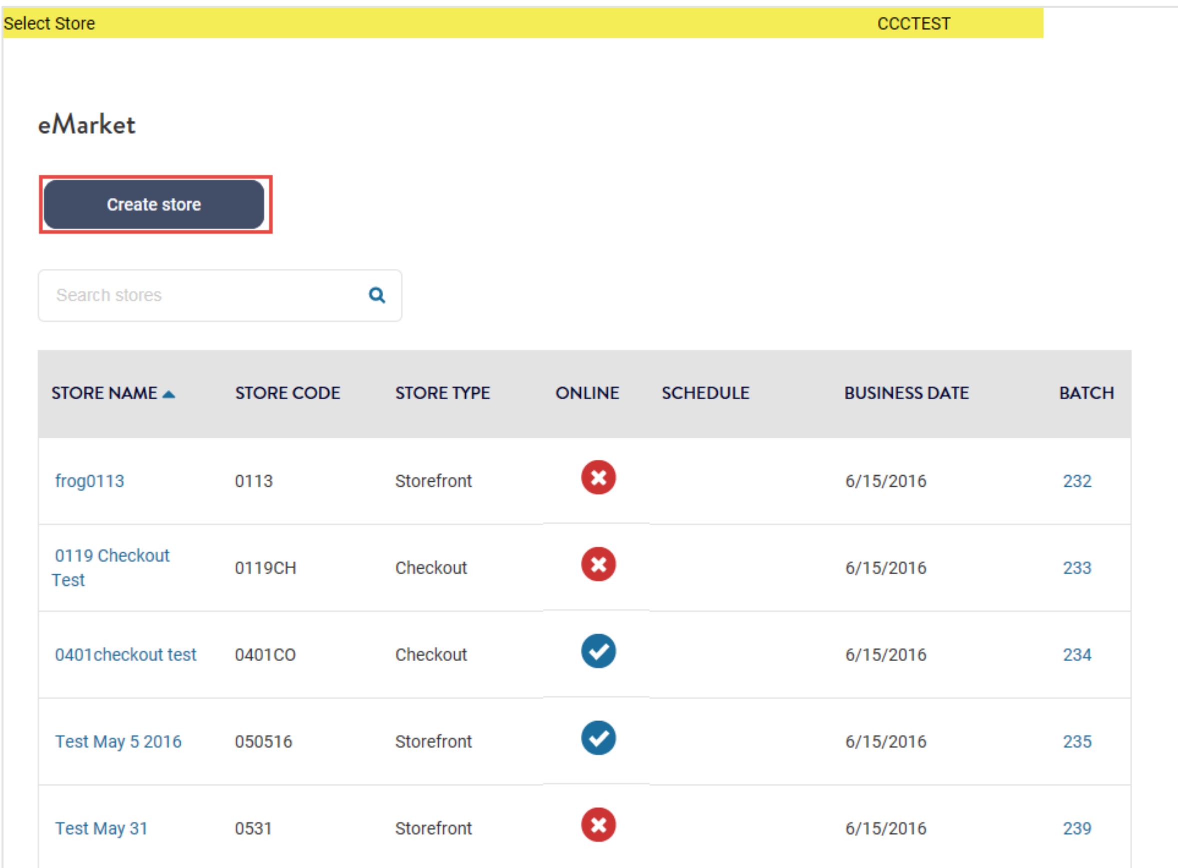
3.2 Starting a New eMarket Store

Note: eMarket operators may not have the necessary permissions to create stores. Normally, the CASHNet Administrator must perform this process.

To start a new store:

1. At the top of the eMarket store selection page, click the **Create store** button.

Figure 6: eMarket Store Selection Page



The Create eMarket Store page loads, asking you to complete the basic store information fields.

2. Fill in the basic store information fields according to the example in Figure 7 and the instructions Table 8 below.

Figure 7: Example Basic Store Information Fields

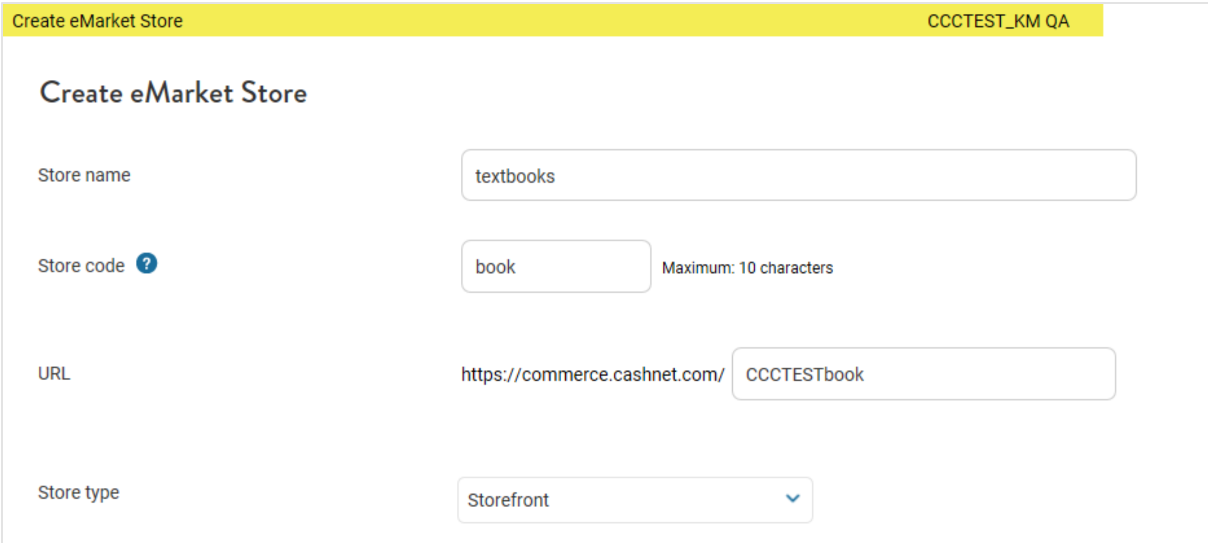


Table 8: Instructions for Basic Store Information Fields

FIELD NAME	DATA ENTRY INSTRUCTIONS
Store name	Enter a name for the store. This will display in the eMarket store selection page.
Store code	Enter an identifier for the store. **Tip:** Keep the store code as short as possible, especially if you are using item codes in the store. Items created within a store are automatically prefixed with the store code and a hyphen. Because items have a maximum of 12 characters, which includes the store code and hyphen, your item code length will be limited to the number of remaining characters following the store code and hyphen. **Note:** The store code **cannot be changed** after you click **Create and continue**.
URL	This field will automatically populate with your client code followed by the store code. Either leave the default value or modify it to a URL of your preference.
Store type	Select your eMarket store type from the available options: • Checkout • Donation • Storefront

After making your selections, the *Payment information*, *Tax states*, and *User information* fields load.

3. Fill in the *Payment information* fields according to the example in Figure 8 and the instructions in Table 9 below.

Figure 8: Example Payment Information Fields

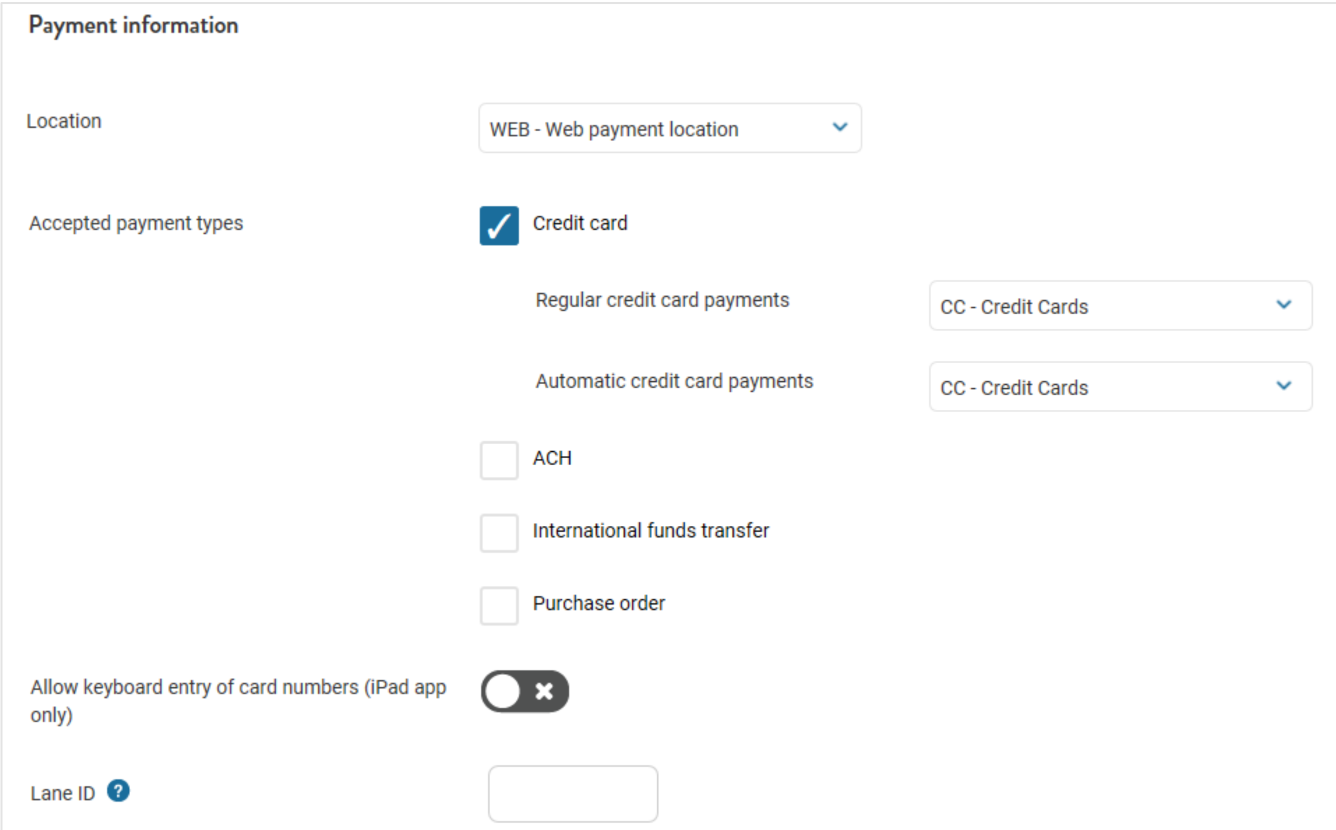


Table 9: Instructions for Payment Information Fields

FIELD NAME	DATA ENTRY INSTRUCTIONS
Location	Select the location associated with the store. Setting the location also creates the store's station in the CASHNet system.
Accepted payment types	Select any payment types that can be used at the store from the available options: • Credit card • ACH • International funds transfer • Purchase order
Credit card payment codes	If you check **Credit card** as an available payment type, the following two fields load: • Regular credit card payments: Select the payment code to be used for all credit card payments except those made through automatic payment plans. • Automatic credit card payments: Select the payment code to be

FIELD NAME	DATA ENTRY INSTRUCTIONS
	used for credit card payments made as part of an automatic payment plan. If desired, this can be the same payment code for regular credit card payments.
ACH payment codes	If you check **ACH** as an available payment type, the following four fields load: • Regular ACH payments: Select the payment code to be used for all ACH payments except automatic and assisted payments. • Automatic ACH payments: Select the payment code to be used for ACH payments made as part of an automatic payment plan. • Assisted ACH payments: Select the payment code to be used for ACH payments made over the phone or in person through operator-assisted payments. • Assisted and automatic ACH payments: Select the payment code to be used for payments made as part of an automatic payment plan which are also over the phone or in person through operator-assisted payments.
International funds transfer payment code:	If you check **International funds transfer** as an available payment type, this field loads. Select the payment code to be used for all international funds transfer payments.

If you check **Credit card** as an available payment code, the *Credit card security options* fields load, enabling you to set the credit card AVS and CID settings.

4. Fill in the *Credit card security options* fields according to the example in Figure 9 and the instructions in Table 10 below.

Figure 9: Example Credit Card Security Options Fields

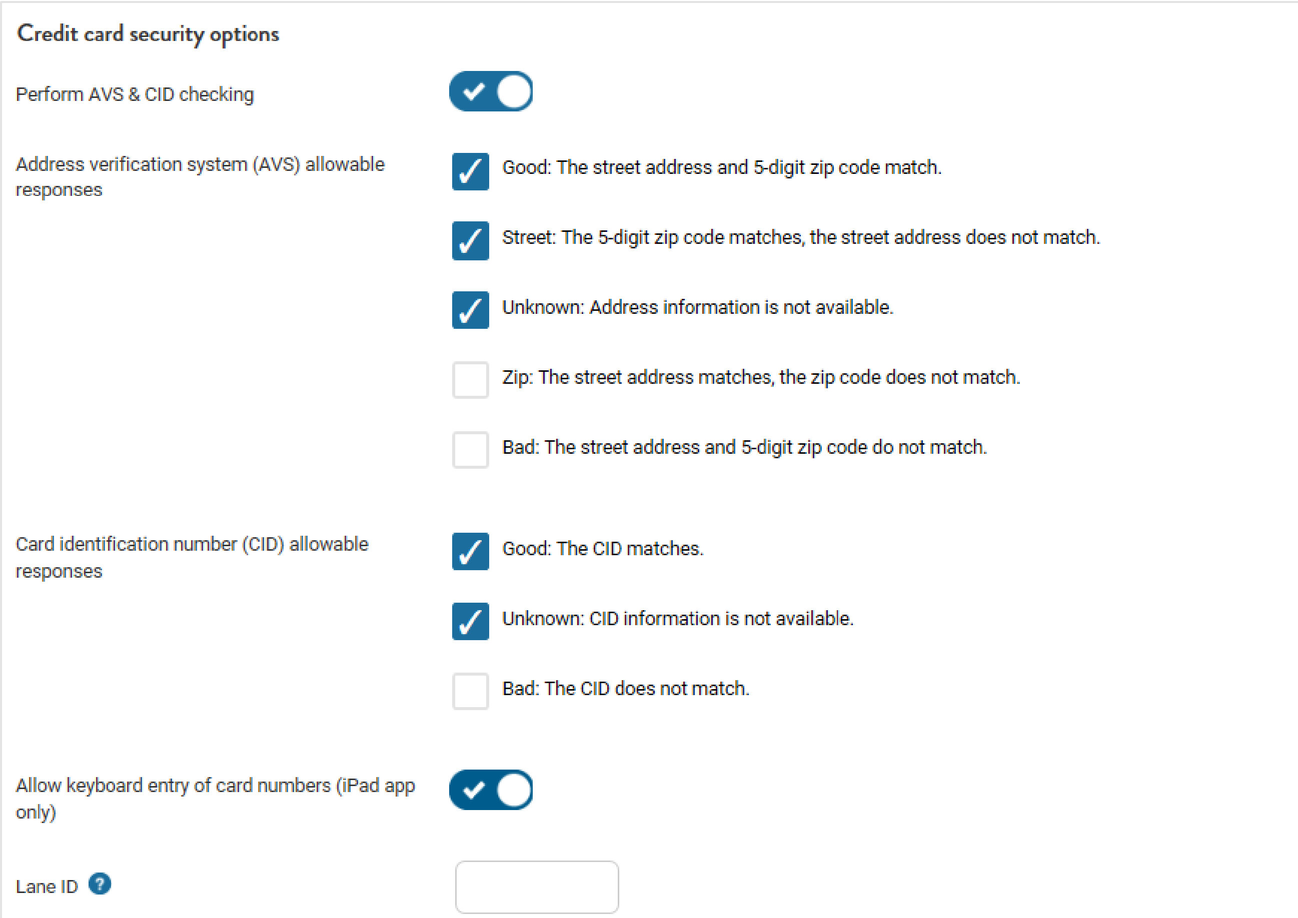


Table 10: Instructions for Credit Card Security Options Fields

FIELD NAME	DATA ENTRY INSTRUCTIONS
Perform AVS & CID checking	**Note:** If your institution is using SmartPay, this option will **not** display. If your institution has selected not to use SmartPay, **check** this option if you would like Address Verification System (AVS) and/or Card Identification number (CID) checking to be performed. CASHNet's default AVS and CID settings will then display and can be modified, as described below. **Note:** Many merchant banks offer better rates if some checks are performed. Consult with your merchant bank before making any AVS or CID selections.
Address verification system (AVS) allowable responses	**Note:** These fields will only display if you checked **Perform AVS & CID checking**. When AVS checking is performed, the billing address entered is compared to the billing address on file for the cardholder and one

FIELD NAME	DATA ENTRY INSTRUCTIONS
	automatic response code is returned. Possible response codes are **Good**, **Street**, **Unknown**, **Zip**, and **Bad**, which are explained on the page. CASHNet's default settings check the **Good**, **Street**, and **Unknown** checkboxes. Street makes sure the zip code matches but allows the street address to not match. CASHNet recommends not requiring the street address to match because of the many possible ways a street address can be entered—for example, "555 First Street" would not be considered a match if the address on file is "555 1st Street". Verifying that users have entered the correct zip code is a good way to protect your institution against fraudulent transactions. In some cases, doing so can also result in lower transaction fees from your acquirer. Therefore, CASHNet does not recommend checking the Zip or Bad checkboxes. Check or uncheck any checkboxes that should be considered acceptable responses. When a response code is returned and the corresponding checkbox is not checked, the transaction will be declined. **Note:** If you deselect all of the checkboxes, AVS checking will not be performed.
Card identification number (CID) allowable responses	**Note:** These fields only display if you checked **Perform AVS & CID checking**. A CID (also known as CVV2 or CVC2) is the three or four digit card identification number normally located on the back of cards (American Express places the CID on the front). When CID checking is performed, the CID entered is compared to the CID on file for the cardholder and then one automatic response code is returned. Possible response codes are **Good**, **Unknown**, and **Bad**, which are explained on the page. CASHNet's default settings check the **Good** and **Unknown** checkboxes. Verifying that users have entered the correct CID is a good way to protect your institution against fraudulent transactions. In some cases, doing so can also result in lower transaction fees from your acquirer. Check or uncheck any checkboxes that should be considered acceptable responses. When a response code is returned and the corresponding checkbox is not checked, the transaction will be declined. **Note:** If you deselect all of the checkboxes, CID checking will not be performed.
Allow keyboard entry of card numbers (iPad app only)	If you plan to use the Mobile Payments app for iPad with this store, **check** this option if operators should be able to manually type card credit numbers and expiration dates.

FIELD NAME	DATA ENTRY INSTRUCTIONS
	If this option is **unchecked**, a card reader must be used to accept credit card payments.
Lane ID (optional)	For this optional field, you may enter a unique value that represents the station where the credit card transaction originates. This value may be passed to the credit card processor. This value will be saved in the station associated with the store.

5. Fill in the *Tax states* fields according to the example in Figure 10 and the instructions in Table 11 below.

Figure 10: Example Tax States Fields

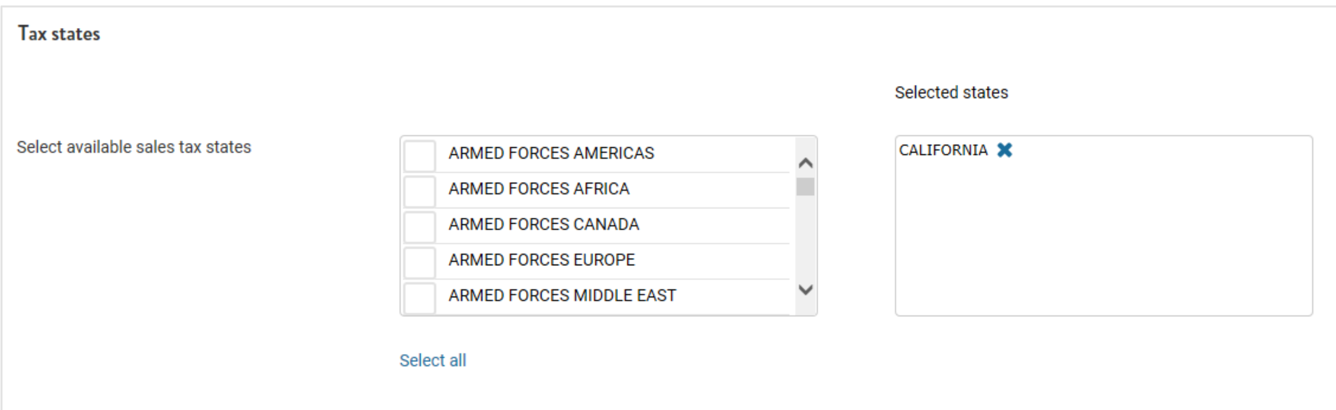


Table 11: Instructions for Tax States Fields

FIELD NAME	DATA ENTRY INSTRUCTIONS
Select available sales tax states	If CASHNet is configured to have CASHNet-maintained sales tax rates applied to any of this store's item codes, check the states that should be charged sales tax. To select all states, click **Select all**.

6. Fill in the *User information* fields according to the example in Figure 11 and the instructions in Table 12 below.

Figure 11: Example User Information Fields

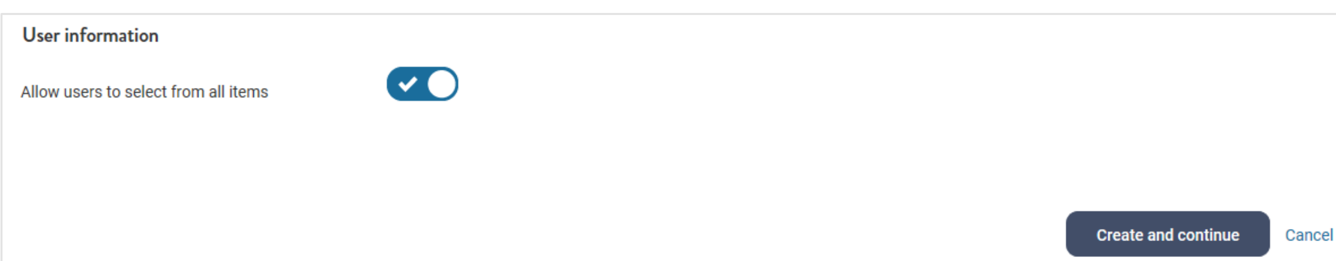


Table 12: Instructions for User Information Fields

FIELD NAME	DATA ENTRY INSTRUCTIONS
Allow users to select from all items	This field determines whether store users can view and add items to the store from among all of the items in your CASHNet instance, or if they can only create and see items specifically for the store. This field is **checked** by default.

7. Click the **Create and continue** button.

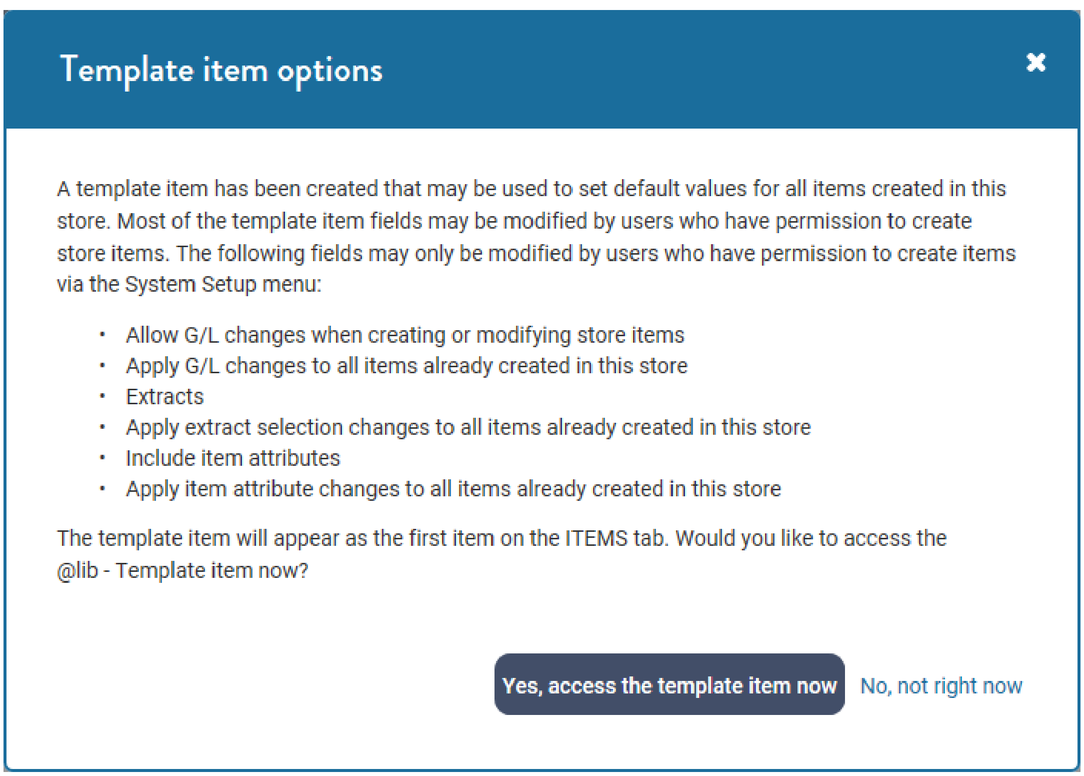
   The store is created and *Template item options* window loads, explaining that a template item has been created for the store and asking you whether you want to access the template item now or later.

   a) If you click **Yes, access the template item now**, the store setup loads the template item's details. The settings for the template item serve as the basis for all future items created through the store. For instructions on how to modify the template item, refer to Section 6.2.3 on page 42.

   Note: The template item may be modified at any time.

   a) If you click **No, not right now**, store setup loads, starting with the Site settings (see Section 5 on page 34).

Figure 12: Template Item Options Window



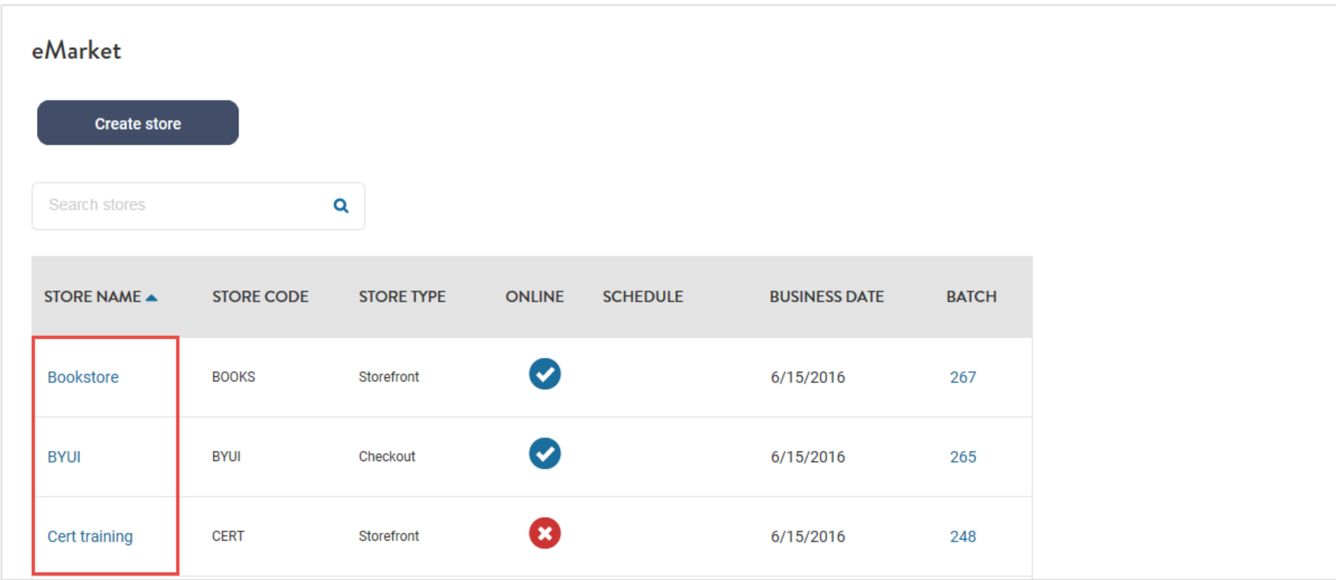
3.3 Opening an Existing Store

After a store has been created (Section 3.2 on page 21), the store will display in the eMarket Store Selection page, where it can be accessed by eMarket operators to view or modify its settings.

To open an existing store:

1. Access the eMarket Store Selection page (see Section 3.1 on page 20).
2. In the list of available of stores, click the name of the store that you want to open.

Figure 13: Store Name Cell in eMarket Store Selection Page



STORE NAME	STORE CODE	STORE TYPE	ONLINE	SCHEDULE	BUSINESS DATE	BATCH
Bookstore	BOOKS	Storefront			6/15/2016	267
BYUI	BYUI	Checkout			6/15/2016	265
Cert training	CERT	Storefront			6/15/2016	248

4 Store Setup Experience Overview

Once a store is created, all of the store setup steps and store maintenance will take place through the "store setup experience." This section explains store setup's navigation and administrative tools that you can use to create, modify, and publish stores.

4.1 Store Setup Tabs

The store setup experience is divided into setup "tabs" that are meant to be followed sequentially. However, at any time in your store configuration, you can skip ahead or return to previous steps by clicking a different tab.

Figure 14: Store Setup Tabs

Before a store has been published, there are 5 setup tabs. After a store has been published once, the PUBLISH tab no longer displays, and you can use the **Publish** button to publish new changes to the store (see Section 4.2.1 below). Each of the tabs does the following:

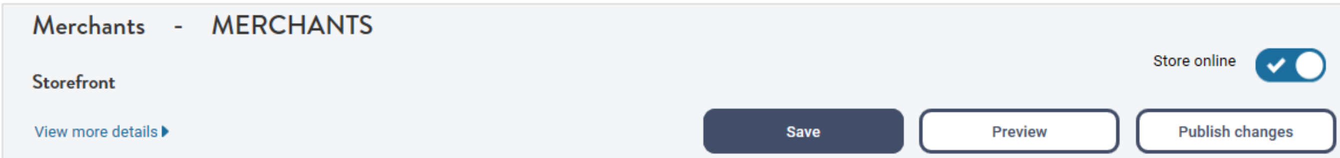
- **SITE**: Determines general site behavior including the login requirements and the end of transaction workflow. For instructions, see Section 5 on page 34.
- **ITEMS**: Determines the items available for purchase in the store as well as the associated categories, discounts, and information fields. For instructions, see Section 6 on page 40.
- **LAYOUT**: Determines the display of the site, including the logo and fonts, colors, and text on the various pages. For instructions, see Section 7 on page 65.
- **NOTIFICATIONS**: Determines the CASHNet system notifications that will be sent to the client or third-party systems as well as the email notification settings. For instructions, see Section 8 on page 74.
- **PUBLISH**: Displays all of your site, items, layout, and notifications settings in a single page and enables you to review and publish your store. For instructions, see Section 9 on page 78.

4.2 Top Navigation Tools

Additional store setup's navigation tools appear at the top of each page and enable you to perform important administrative actions.

Note: The **Publish changes** button will only display after you have published the store for the first time. You must use the PUBLISH tab to publish the store for the first time.

Figure 15: Top Navigation Tools



4.2.1 Saving, Previewing, and Publishing Changes

The Save, Preview, and Publish changes buttons do the following:

- **Save**: Saves any changes made during your current working session.
- **Preview**: Launches a preview of the site in a new tab. For more details, see Section 9.1.2 on page 79.
- **Publish changes**: Loads the *Publish changes* window, which allows you to either publish your changes immediately or at a specified future time. For more details, see Section 9.2 on page 79.

4.2.2 Taking the Store Offline

Taking a store offline is meant to be used when you are performing temporary maintenance or making changes to the store.

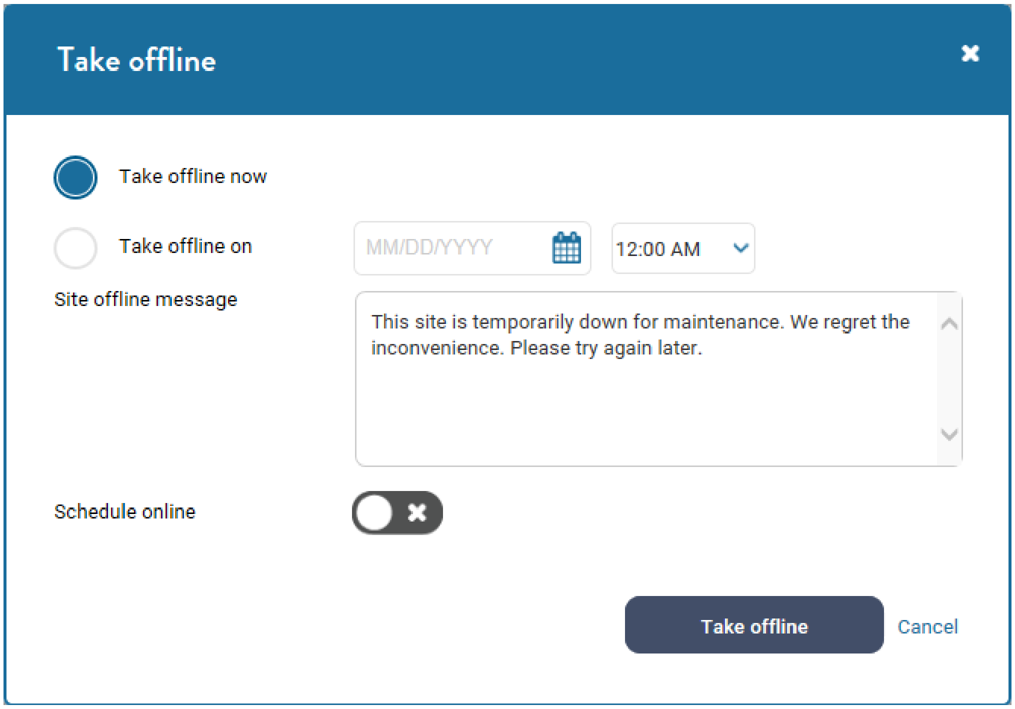
Note: If you want to disable the store permanently or for a long period of time, you will want to disable the store instead (see Section 4.2.4).

To take the store offline:

1. Click the **Store online** switch.

   The *Take offline* window loads. Using this window, you can put the take the store offline immediately or at a scheduled future time.
2. Select either the **Take offline now** or **Take offline on** radio button. If scheduling a time, select the time and date.
3. If desired, modify the default **Site offline message** that will display to users attempting to access the site.

Figure 16: Take Offline Window



4. If you would like to schedule a time to bring the site back online, click **Schedule online** and select a date and time. Alternatively, you can bring the store back online manually by clicking the **Store online** switch in the top navigation.

4.2.3 Viewing More Details

You can access the basic store information that was set during the initial configuration. Depending on your permissions, you may be able to edit some of these settings.

To access the basic information fields:

1. At the top of store setup, click the **View more details** link.

   The *More Details* view loads, enabling you to edit the store's basic information as well as disable, re-enable, and delete the store.
2. For details on how to edit the basic information fields, refer to Section 3.2 on page 21.

4.2.4 Disabling, Re-Enabling, and Deleting a Store

Through the *More Details* view, you can disable, enable, and delete the store.

- **Disable**: Disabling the store is meant to take the store offline for an extended period of time. To disable a store, click the **Disable store** button.

* **Enable**: After a store has been disabled, you can re-enabled it by clicking the **Enable** store button.
* **Delete**: After a store has been disabled, you can permanently delete the store from the CASHNet system by clicking the **Delete** store button. Because this cannot be undone, disabling the store is generally recommended in case you think you may ever need to review the store's details.

5 Site Settings

The SITE tab determines the general site behavior such as the login requirements and the end of transaction workflow.

5.1 Configuring the Site Settings

To configure the site settings:

1. If not already active, click the **SITE** tab.
2. Fill in the *Login requirements & page settings* fields according to the example in Figure 17 and the instructions in Table 13 below.

   Note: Several fields listed below only display for certain store types. All of the screenshots use a Storefront store as an example.

Figure 17: Example Login Requirements & Page Settings Fields

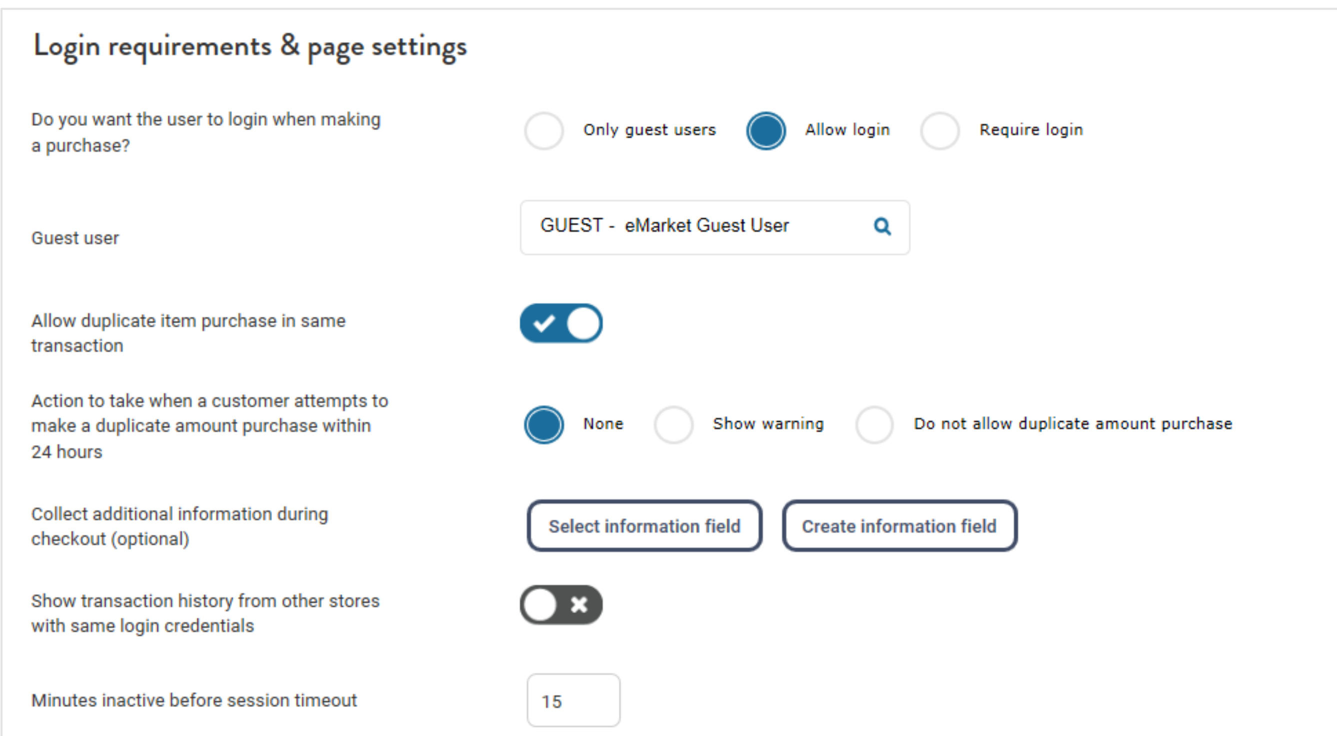


Table 13: Instructions for Login Requirements & Page Settings Fields

FIELD NAME	DATA ENTRY INSTRUCTIONS
Assisted payments URL	**Note:** This field only displays for **Checkout** sites AND you are using assisted payments. If administrators will process assisted payments for payers at this store, enter the URL administrators will begin from when processing an assisted payment; otherwise, leave blank. **Note:** Be sure to include http:// or https:// at the beginning of the URL.
Authentication method	**Note:** This field only displays for **Checkout** sites. If you want to use authentication in the Checkout request, select the checkout authentication method. If this field is left blank, no authentication will be performed. Note that the calling site must use the same algorithm to form the checkout request. Available options: • **MD5** • **SHA1** • **HMAC-MD5** • **MD5 - Base64 Encoded** • **SHA1 - Base64 Encoded** • **HMAC-SHA1**
Authentication key	**Note:** This field only displays for **Checkout** sites AND if you selected an authentication method above. If a checkout request authentication method will be used, an authentication key is required. Share this key with the IT personnel in charge of coding the checkout request for the calling site. (100-alphanumeric character maximum. No spaces allowed.)
Authentication code or digest parameter name	**Note:** This field only displays for **Checkout** sites AND if you selected an authentication method above. This allows you to override the request parameter that will hold the message authentication code or digest. This will default to `digest`. To set a different value, enter it in this field. Share this value with the IT personnel in charge of coding the checkout request for the calling site. (50-character maximum.)
Do you want the user to login when making a purchase?	Select the payer login option from the available options: • **Only guest users**: This is the default option. Users will not be able to log in or register. All transactions will be for guest users only. • **Allow login**: Users will be able to log in to the eMarket, register, or continue as a guest user. • **Require login**: Users will be required to log in to the eMarket or register using their CASHNet credentials. No transactions will be for guest users.

FIELD NAME	DATA ENTRY INSTRUCTIONS
Guest user	**Note:** This field only displays if you selected **Only guest users** or **Allow login** above. This field determines the username for guests. Enter part of the username in the search box to find the user, then click the username to select it.
Allow duplicate item purchase in same transaction	**Note:** This field only displays for **Storefront** sites. This field indicates whether or not a payer may add the same item more than once to a basket. This is **checked** by default. For example, you may have the same item available for purchase in different colors. If you have set up your items with the available colors being listed as an information field, this field would need to be checked to allow a payer to purchase more than one color of the same item.
Allow user to select items during checkout	**Note:** This field only displays for **Checkout** sites and only applies if an item code is not provided in the checkout string or a default item code has not been defined in CASHNet. When checked, this will allow item code selection during the CASHNet checkout process. This is **unchecked** by default.
Allow user to change item price(s) during checkout	**Note:** This field only displays for **Checkout** sites. Check this option to allow payers to modify item amounts during the checkout process. This is **unchecked** by default.
Action to take when a customer attempts to make a duplicate amount purchase within 24 hours	**Note:** This field only displays if you selected **Allow login** or **Require login** above. CASHNet has the ability to display a warning message to payers if they attempt to make more than one payment on the same account within a 24-hour period. Select your preference from the available options: • **None**: Disable this function. This is selected by default. • **Show warning**: Only display an informational warning to the payer. • **Do not allow duplicate purchase amount**: Do not allow the payer to make another payment of the same dollar amount within the 24-hour period.
Collect additional information during checkout (optional)	If you want the store to collect information from all payers during the transaction at the end of the checkout process (i.e., not associated with any items), select or create the information fields to be used and indicate how they will be displayed to the payer. For detailed information, see Section 6.5 on page 56.
Show transaction history from other stores with	**Note:** This field only displays if you selected **Allow login** or **Require login** above AND your ePayment & eMarket Control Parameters

FIELD NAME	DATA ENTRY INSTRUCTIONS
same login credentials	settings allow operators to view the payment history. If a payer uses the same login information for stores other than this one, **check** this checkbox if transactions from the other stores should appear in the payer's payment history screen for this store. This is **unchecked** by default.
Minutes inactive before session timeout	Enter the number of minutes the store will allow no activity before the user is automatically logged off. This is set to **15** minutes by default.

3. Fill in the *End of transaction behavior* fields according to the example in Figure 18 and the instructions in Table 14 below.

Figure 18: Example End of Transaction Behavior Fields

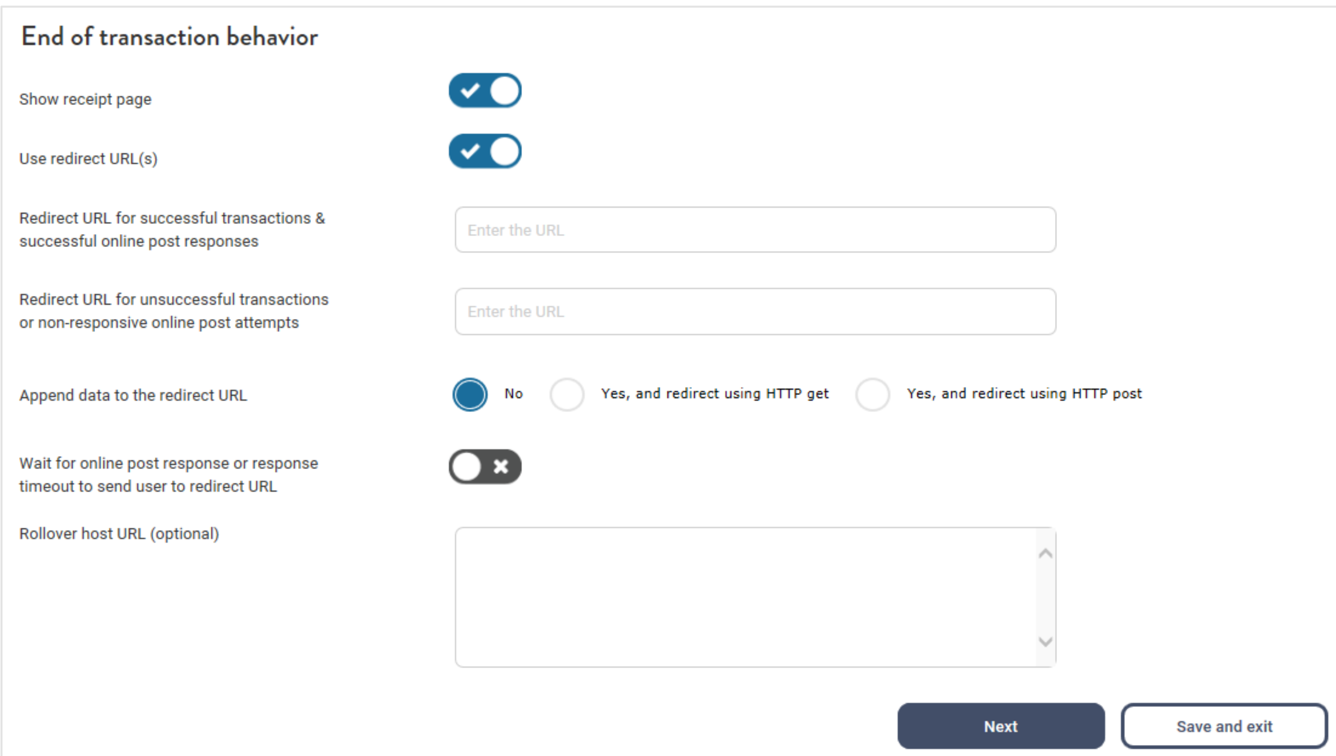


Table 14: Instructions for End of Transaction Behavior Fields

FIELD NAME	DATA ENTRY INSTRUCTIONS
Show receipt page	This field indicates whether or not the receipt page should be displayed to payers after a transaction, and is **checked** by default. To skip the receipt page, **uncheck** this field.
Use redirect URL(s)	This field indicates whether or not payers should be redirected to [a] specified URL(s) after a completing transaction, and is **unchecked** by default.

FIELD NAME	DATA ENTRY INSTRUCTIONS
	To use [a] redirect URL(s), **check** this field. When checked, the 5 fields listed in this table below display.
Redirect URL for successful transactions & successful online post responses	**Note:** This field only displays if you checked **Use redirect URL(s)**. Enter the URL address that the user will automatically be directed to when either timing out or signing out of the store after completing a transaction. If this field is left blank, users will be directed to what is selected as the Start page in the LAYOUT tab. **Note:** Be sure to include http:// or https:// at the beginning of the URL.
Redirect URL for unsuccessful transactions or non-responsive online post attempts	**Note:** This field only displays if you checked **Use redirect URL(s)**. Enter the URL address that the user will automatically be directed to when either timing out or signing out of the store prior to completing a transaction. If this field is left blank, users will be directed to what is selected as the Start page in the LAYOUT tab. **Note:** Be sure to include http:// or https:// at the beginning of the URL.
Append data to the redirect URL	**Note:** This field only displays if you checked **Use redirect URL(s)**. If a URL is entered into either of the two fields above, CASHNet gives you the ability to pass information to that URL when a payer clicks the sign-out button or times out. The information will state whether the payer timed out, signed out prior to attempting to process a payment, or completed a successful transaction or attempted a transaction that failed. It will also include detailed payer and transaction information. Select among the available options: • **No**: Do not append data. This is selected by default. • **Yes, and redirect using HTTP get**: Append data using HTTP get. • **Yes, and redirect using HTTP post**: Append data using HTTP post.
Wait for online post response or response timeout to send user to redirect URL	**Note:** This field only displays if you checked **Use redirect URL(s)**. If this option is **checked**, the payer will not get redirected to the student system until the transaction has posted. This is **unchecked** by default.
Wait for online post response message	**Note:** This field only displays if you checked **Use redirect URL(s)** AND you checked the **Wait for online post response [...]** field

FIELD NAME	DATA ENTRY INSTRUCTIONS
	above. This field determines the text that displays on the page while CASHNet attempts to post the response. The default text displays in the box, which you may modify according to your preferences:
Rollover host URL (optional)	This field is not generally used, and only pertains to institutions using older versions of CASHNet. For additional details, contact CASHNet Support.

4. At the base of the page, click the **Next** button to continue to the Items settings (see Section 6 on page 40).

5.2 Rolling Over the Site's Batch

After you go live, the store will be associated with a daily batch for End-of-Day processing purposes. The batch will roll over automatically at the end of each day, and you do not need to manually change the batch.

In some cases, however, you may need to manually roll over the batch. This could happen if, for example, your End-of-Day did not process correctly or your store has been disabled for a long time and you want to update the batch to the current business day.

Note: You can only roll over the batch after your site has been published for the first time.

To roll over the batch manually:

1. Navigate to the store's SITE tab.

   At the top of the page the current batch number is listed.

   Tip: You can also view the batch number in the eMarket store selection page.

2. To roll over the batch, click the **Rollover** link.

   The batch is rolled over and the new batch number displays.

6 Items Settings

The ITEMS tab determines the items available for purchase in the store as well as the associated categories, discounts, and information fields.

Note: In many cases, there are pre-requisite system setup requirements to use tax, shipping, and discounts in stores. For details configuration steps, refer to the *ePayment & eMarket User Manual*.

6.1 Items Tab Navigation Tools

The ITEMS tab is divided into four main sub-tabs—ITEMS, CATEGORIES, DISCOUNTS, and INFORMATION FIELDS—that displays a list page for each element.

Note: Depending on the store type and your user permissions, not all of the sub-tabs may display.

At the top of the items page, there also are buttons that enable you to perform specific items actions including selecting items, creating items, creating discounts, and creating information fields. All of these navigation tools are discussed in the next sections.

Figure 19: Items Tab Navigation Tools

6.2 Adding Items to the Store

There a number of options for how you can configure items for your store. In most cases, you will want to use a distinct CASHNet item for each item, service, or charge available for purchase or assigned to a customer.

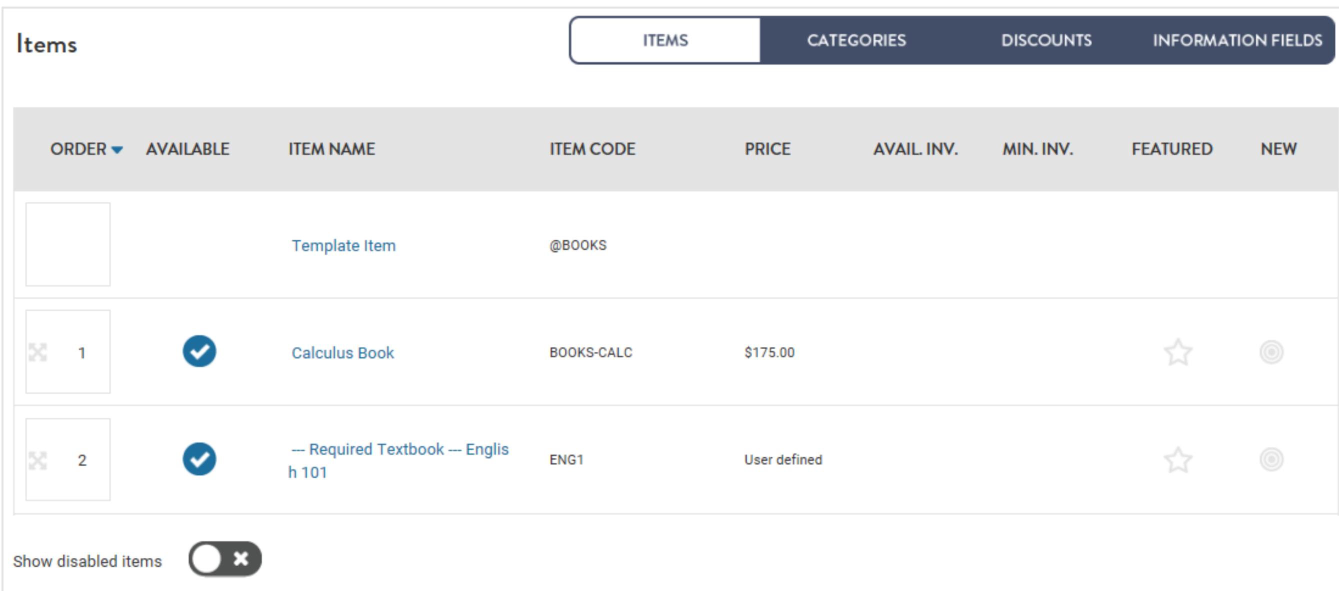
There are a two main ways to add items to your store: you can select existing items or you can create items specifically for the store through store setup. In addition, in some cases, you may want to use only a default item for eMarket Checkout store types. All of these options are explained in the subsequent sections.

6.2.1 About the Items List

When you access the ITEMS sub-tab, the Items list page displays. This page displays the template item and all of the items currently associated with the store. As you select and create items for the store, the items will be added to this list.

After you have added all of your items to the Items list, you will want to review them and how they display in the store. For details on how to perform these additional list page tasks, see Section 6.2.6 on page 48.

Figure 20: Item List Page



6.2.2 Selecting Items to Add to the List

Although you can create new items specifically for your store, you may want to select items that have been already created in your CASHNet instance.

To select existing items and add them to the store:

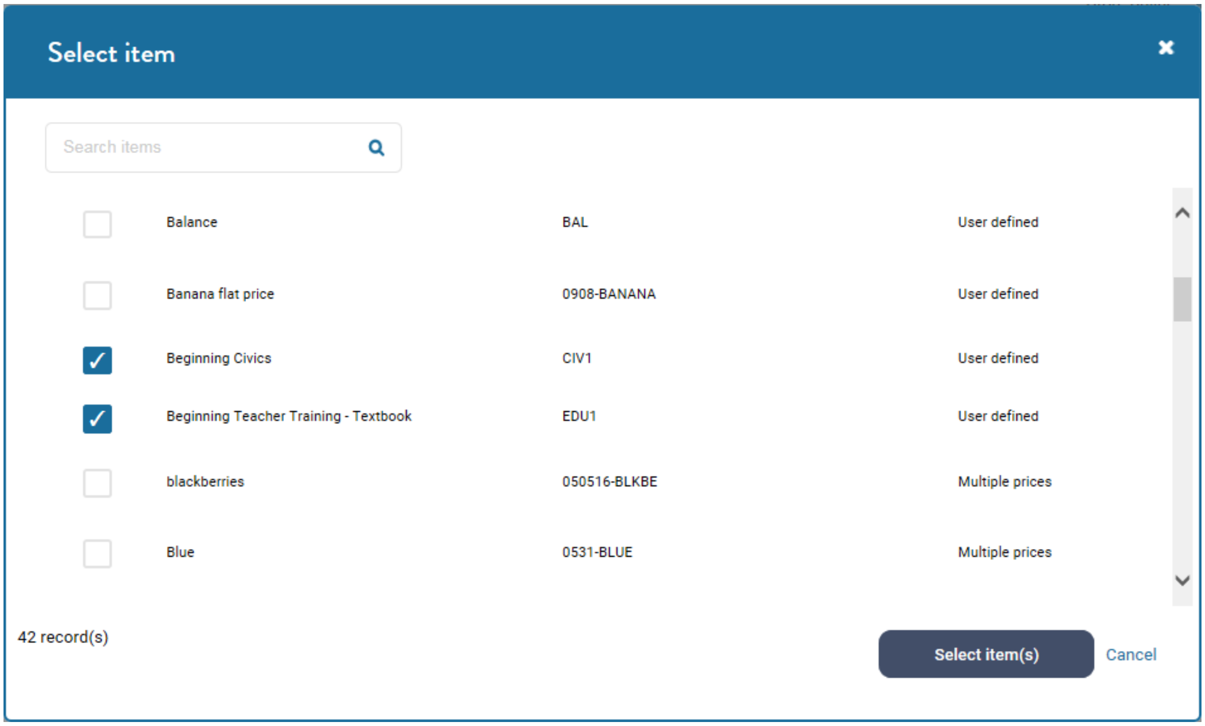
1. At the top of the ITEMS page, click the **Select item** button.

   The *Select item* window loads, listing all of the items available in your CASHNet instance.

2. Select the **check box(ex)** next to any items that you want to add to the store.

   Tip: You can use the search box to filter by item name or item code.

Figure 21: Selecting Items to Add



3. Click the **Select item(s)** button.

   Store setup returns you to the ITEMS tab and displays your selected items in the Items list page.

6.2.3 Viewing or Modifying the Template Item or Other Existing Items

If you want to create items through store setup, you will most likely want to start by modifying the template item so that it includes the baseline settings you will use for most of your items.

These instructions can also be used to modify any items that already display in your Items list.

To modify the template item or another item in your list:

1. In the Items list, click the **Template Item** link or the **item name** of an existing item.

   The *View item* page loads, enabling you to modify the item.

2. Modify the item's fields according to the guidelines listed in Table 15 below.
3. At the base of the page, click the **Save** button.

   Tip: You can copy an existing item for use in creating a new item by clicking the **Copy** button.

6.2.4 Creating New Items

You can create items for use in the store through store setup. Items that you create in store setup are generally intended to be used with that store only and are automatically prefixed with the store code. However, they can still be selected in the *Select items* window in other stores.

To create a new item for the store:

1. Click the **Create item** button.

   The *Create item* page loads.

2. Fill in the item code fields according to the example in Figure 22 and the instructions in Table 15 below.

Figure 22: Example Item Code Fields

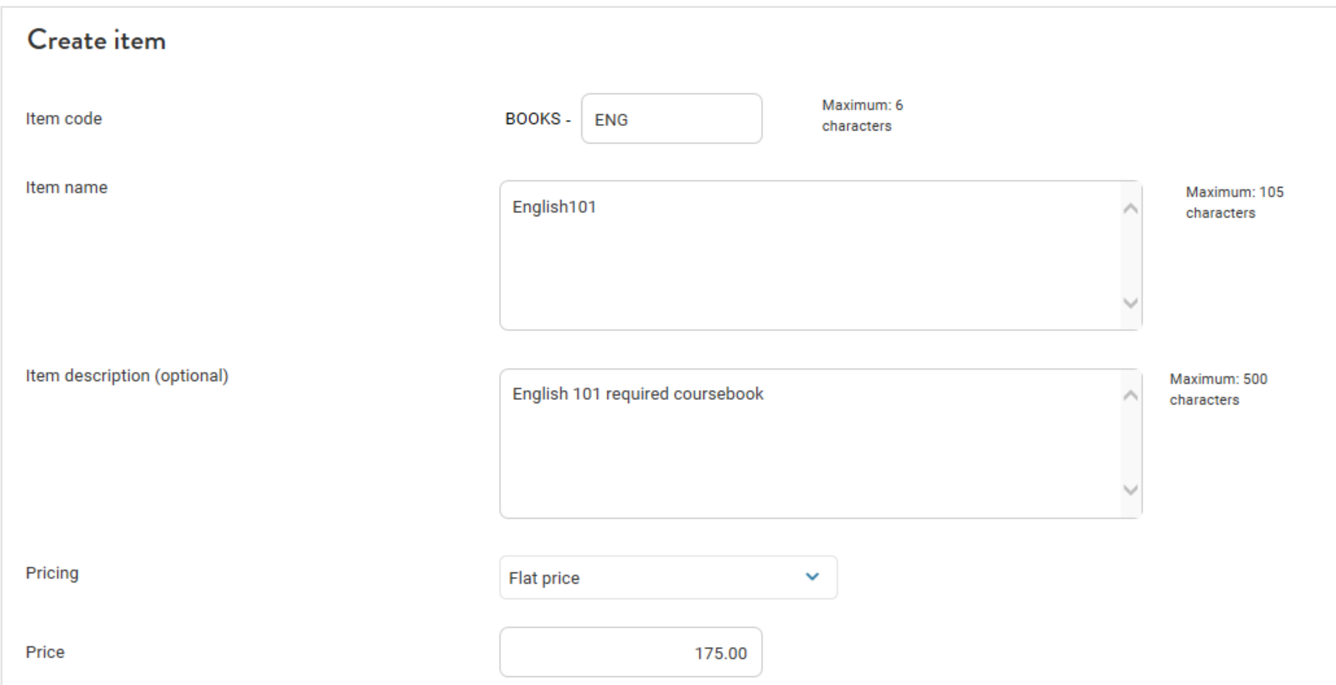


Table 15: Instructions for Item Code Fields

FIELD NAME	DATA ENTRY INSTRUCTIONS
Item Code	Enter a unique identifier for the item. Once saved, this field cannot be edited. CASHNet recommends making each item code descriptive yet as short as possible. (12 alphanumeric-character maximum [total, including prefix]. No spaces allowed.)
Item name	Enter a description of this item code. (105-character maximum.)
Item description (optional)	Enter additional information about the item code that will display in the site for payers.

FIELD NAME	DATA ENTRY INSTRUCTIONS
Pricing	Select the method by which the item's price should be determined from the available options: • **Flat price**: The price is fixed at a set amount per item and cannot be changed. • **Enter during transaction**: The price can be modified by the payer. • **Multiple quantity price**: The price varies according to the quantity purchased, where specific quantities are charged a set total price. • **Tiered price**: The price varies according to the quantity purchased, where specific quantity ranges are multiplied by a set price per item.
Flat price fields	If you select **Flat price**, the following fields display: • Price: Enter the fixed price per unit. This field is required, but you may enter $0.00. • Allowable quantity (optional): If desired, you may enter the minimum and maximum quantities that payers may purchase in a single transaction. • Unit quantity label (optional): If desired, you may enter the name to be used for a single unit (e.g., transcript) and for multiple units (e.g., transcripts).
Enter during transaction fields	If you select **Enter during transaction**, the following fields display: • Default price: If desired, you may set a price that displays by default for the item. • Maximum allowable price: Set the maximum price that a payer may enter for the item.
Multiple quantity price fields	If you select **Multiple quantity price**, the following fields display: • Quantity: Enter a quantity value. • Total price: Enter the total price for the quantity value to the left. To add more rows, click **Add another quantity value**. • Unit quantity label (optional): If desired, you may enter the name to be used for a single unit (e.g., transcript) and for multiple units (e.g., transcripts).
Tiered price fields	If you select **Tiered price**, the following fields display: • Minimum quantity: Enter the minimum quantity value for a price tier. • Maximum quantity: Enter the maximum quantity value for a price

FIELD NAME	DATA ENTRY INSTRUCTIONS
	tier. • Price per item: Enter the price charged per item for quantities within the price range. To add more rows, click **Add another quantity range**. • Unit quantity label (optional): If desired, you may enter the name to be used for a single unit (e.g., transcript) and for multiple units (e.g., transcripts).
Image	If you would like to have an image display for the item, click the image button and select a GIF or JPG formatted image. The image size must be 500 x 500 pixels or less and the file size must be 1.0 MB or less. If the image height or width exceeds 500 pixels, it will automatically be cropped to exactly 500 pixels starting from the top left-hand corner. After uploading the image, the image will appear on the screen with a Delete button underneath it to remove the image.
Highlight item	• Display as new item: Check this checkbox if the item should display as a new item. • Display as featured item: Check this checkbox if the item should display as a featured item.
Category	Select the category from the dropdown menu of available category codes that this item will be classified under. For details on how to create and configure categories, see Section 6.3 on page 49.
Collect additional information during transaction	If you want the store to collect information from payers when purchasing this item, select or create the information fields to be used and indicate how they will be displayed to the payer. For detailed information, see Section 6.5 on page 56.
Recommend add-on items	Check this checkbox if additional items should be available when this item is purchased, then check the items in the box that should be available as add-on items.
Only available as an add-on item	Check this checkbox if this item should only be available as an add-on when a specific item is purchased.
Unique selection group	If the same 1-character code is entered here for several item codes, a payer may only select one of these items in any single transaction.
Track inventory	If you want CASHNet to track the inventory for the item, **check** this field. This field is unchecked by default. When checked, the following fields display: • Select inventory code: Select the associated inventory code. • Enter available inventory: Enter the available inventory for the item.

FIELD NAME	DATA ENTRY INSTRUCTIONS
Collect shipping information	Check the checkbox if shipping charges should be collected when this item is added to a payer's basket. This field is unchecked by default. Note that this requires additional system setup configuration. When checked, the Select shipping category field displays. Select the associated shipping code.
Require fulfillment	Check the checkbox if this item is a physical good that requires fulfillment.
Collect sales tax	If the Use Tax & Shipping Calculation checkbox is checked in the Control Parameters table and this checkbox is checked, sales tax will be added when this item is purchased via ePayment and/or eMarket. If the item is configured to collect shipping information, the tax rate will be based upon the payer's shipping address. Otherwise, the rate will be based upon the zip code entered into the location's Location Zip Code field.
Collect other tax	If institution-maintained tax rates should be charged with this item, select from the available tax codes in the dropdown menu. For more information, reference the *ePayment & eMarket User Manual*.
Item information to show only on receipts	Enter additional information about this item that will only display on the eMarket receipt screen and email receipt. Simple HTML formatting is allowed in this field.
Item group	If the item code should belong to an Item Group, click the dropdown menu and select from the list of available groups.
Allow G/L changes when creating or modifying store items	**Note:** This field only displays for the template item. If administrator should be able to edit or modify the G/L when creating or modifying store items, **check** this checkbox.
G/L	Enter the general ledger account segment-by-segment that the item code will impact. CASHNet will validate each segment as entered.
Apply G/L changes to all items already created in this store	**Note:** This field only displays for the template item. If item codes have been created within store setup and a change to the previous G/L field should be applied to already existing item codes, **check** this checkbox.
Associate with term	Check the checkbox if a term code may be associated with the item code. This requires that a term code be set up within the system. For additional details, refer to the *System Setup User Manual*. When checked, the following options load: • **Use current term**: Select this option if you want the term to default to the current term code defined in the system. • **Specify term**: Select this option if you want to specify a term

FIELD NAME	DATA ENTRY INSTRUCTIONS
	code, then select the term code in the dropdown menu.
Extracts	Check the checkbox next to the appropriate extract(s) to indicate that the item code should be included in the extract. Select whether to extract the item code in summary or detail if available.
Include item attributes	Attributes allows you to store additional information with your item codes. You have the ability to define up to four item code attributes—fields that may or may not contain additional information—based on your institution's policies and procedures. These fields are most commonly used for storing information that would otherwise need to be entered as a reference each time the item code is used. Check this option to include attributes for this item. The 4 Item Code Attributes following fields will appear, where you can enter the attribute values. Note that these fields have a 50-character maximum.

3. At the base of the page, click the **Save** button.

6.2.5 Selecting a Default Item (eMarket Checkout Only)

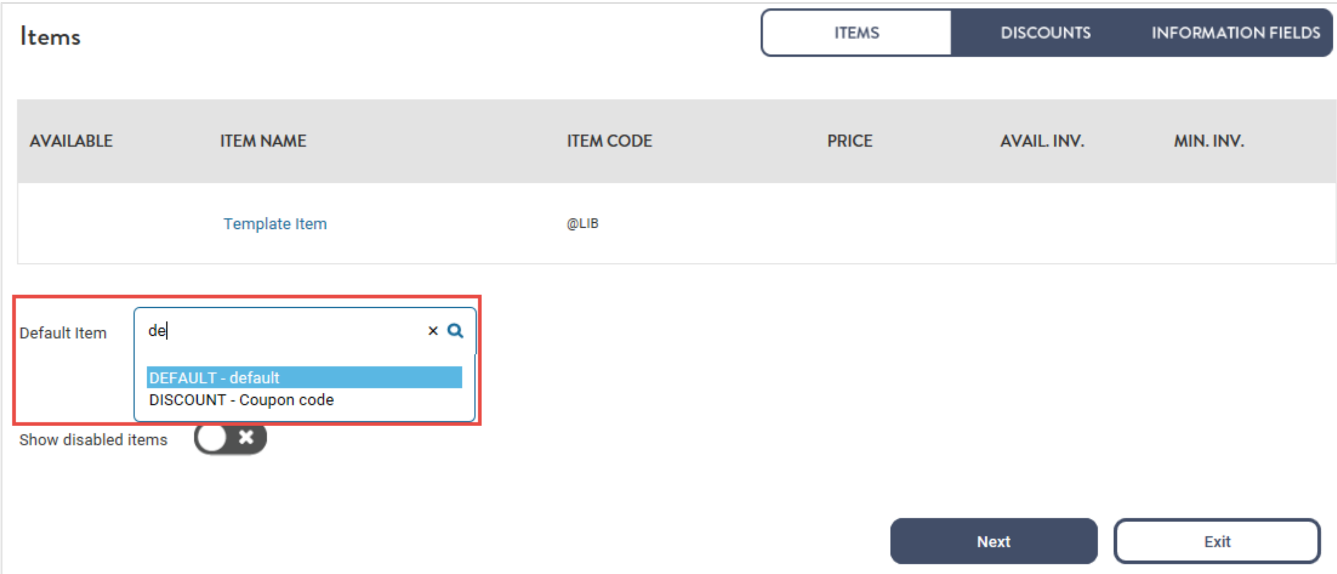
If you are creating an eMarket Checkout store type, you may not want to send CASHNet information about specific items for purchase and instead send only the total amount along with a "default item code" that is required for the checkout request to work.

Note: You will need to create your default item code before you can select it. To create an item, see Section 6.2.4 above.

To select a default item code:

1. In the Items list page, in the Default item field, enter part of the item name in the search box to find the item.
2. Click the **item name** to select it.

Figure 23: Selecting a Default Item



6.2.6 Additional Items List Page Features

Once you have added all of the items you intend to use in the store and reviewed their settings, you will want to review the Items list, adjust the display order of the items, and quickly configure other item settings, as described below.

6.2.6.1 Setting the Store Display Order for the Item

In the Items list, you can determine the order in which items display in the site.

To set the items' display order:

1. Using your cursor, drag the item's position symbol up or down to the desired order in the table.

   The item moves to a new position and the other items automatically adjust their numbering.

6.2.6.2 Setting Items as Featured or New

In the Items list, you can switch on and off whether items display as new and/or featured in the site.

To set items' new and featured statuses:

1. In the item's FEATURED and NEW cells, click the featured symbol and/or the new symbol.

The item's symbol either turns on or off and the item's status changes.

6.2.6.3 Disabling Items

In the Items list, you can disable items so that they no longer display in the site.

To disable items:

1. In the item's AVAILABLE cell, click the available symbol ✔.

   The item availability status changes to ✖.
2. To show disabled items, click the **Show disabled items** checkbox.

6.2.6.4 Tracking the Item Prices & Inventory

In the Items list, you can view the items price settings as well as the available inventory. If you are tracking inventory through CASHNet, alerts related to low inventory will display in the table, allowing you to know when to stock more inventory or temporarily disable those items.

6.3 Adding Categories to the Store

You may want to organize your store's items into categories with similar qualities, which will display in separate sections of the store.

Note: The CATEGORIES sub-tab only displays for eMarket **Storefront** stores.

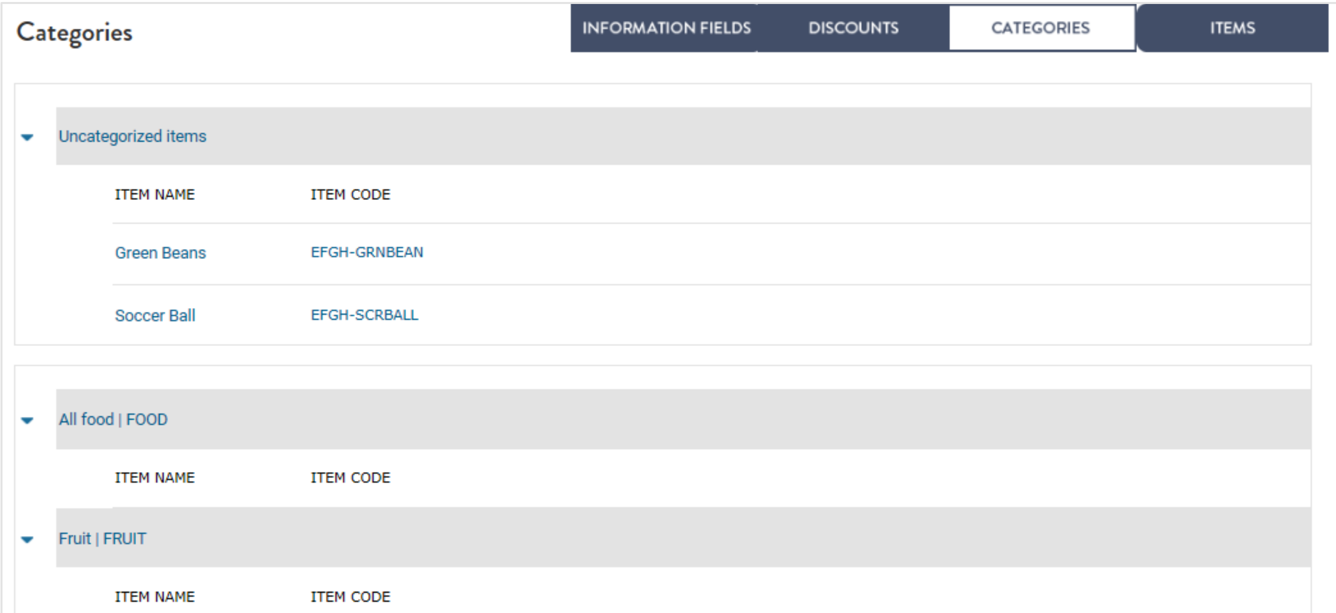
6.3.1 About the Categories List

When you access the CATEGORIES sub-tab, the Categories list page displays all of the categories currently associated with the store as well as the items' category assignments.

As you select and create categories for the store, the items will be added below the category name and any sub-categories.

After you have created all of your categories and assigned your items, you will want to review how the categories will display in the store. For details on how to perform additional list page tasks, see Section 6.3.5 on page 53.

Figure 24: Categories List Page



6.3.2 Creating a New Category

To create a new category:

1. Click the **Create category** button.

   The *Create category* window loads.

2. Fill in the category code fields according to the example in Figure 25 and the instructions in Table 16 below.

Figure 25: Example Category Code Fields

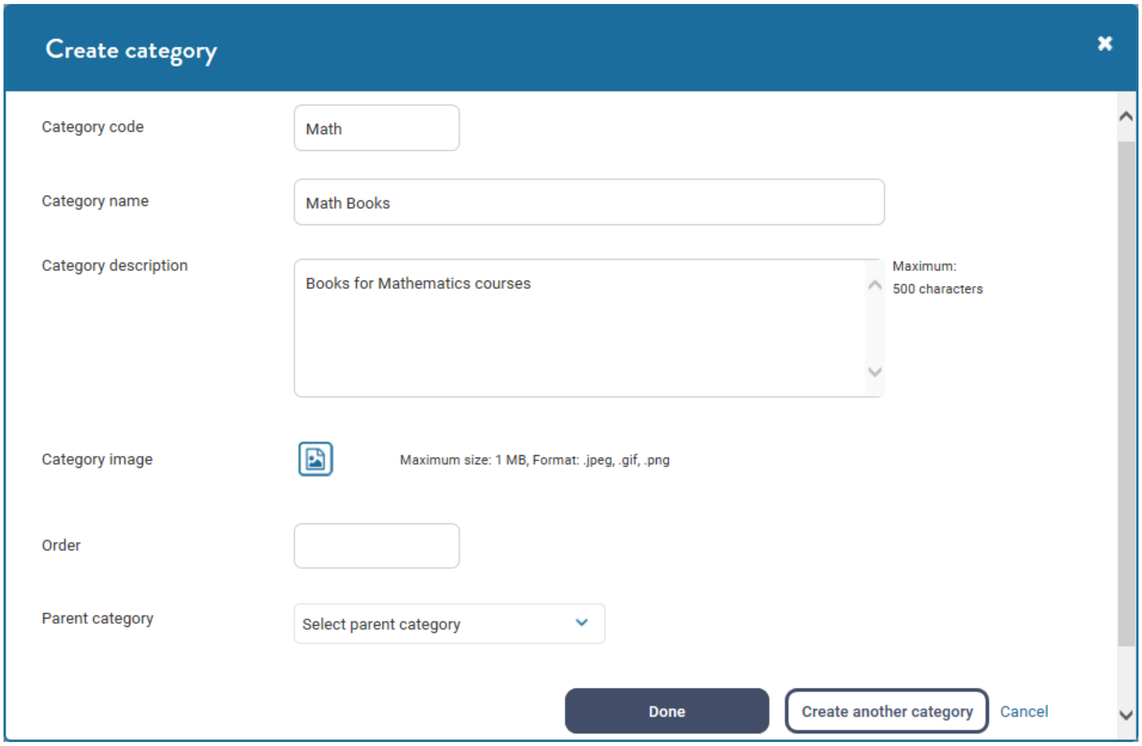


Table 16: Instructions for Category Code Fields

FIELD NAME	DATA ENTRY INSTRUCTIONS
Category code	Enter an identifier for this category. One saved, this value cannot be changed. (12-character maximum.)
Category name	Enter a name for this category that will display in the store. (50-character maximum.)
Category description	Enter a description of this category, if desired. This description will display in the store depending on what is selected for the Show category descriptions on catalog page field in the Layout settings (see Section 7 on page 65).
Category image	If you would like to have an image display for the category, click the image button and select a GIF or JPG formatted image. The image will automatically be sized proportionately to have a width of 47 pixels. After uploading the image, the image will appear on the screen with a Delete button underneath it to remove the image.
Order	Enter the category's display order on the page. We recommend using multiples of 10 for category values. For example, instead of setting category values as 1, 2, 3, 4, and 5, use 10, 20, 30, 40, and 50. This will allow you to insert categories between others in the

FIELD NAME	DATA ENTRY INSTRUCTIONS
	future without needing to change the order of all of them.
Parent category	If this category is a sub-category of another category, use the drop-down menu and select the parent category.
Subcategories	This field displays when viewing an existing category. Listed are all of the subcategories associated with this parent category.

Tip: To create the category and proceed with creating another one, click **Create another category**.

3. At the base of the page, click the **Done** button.

6.3.3 Viewing or Modifying a Category

Once categories have been created, you can view and modify them through the Categories list.

To view or modify a category:

1. In the Categories list, click the **Category name** that you want to modify.

   The *View category* window loads.
2. Modify the category's fields according to the guidelines in Section 6.3.2 above.
3. At the base of the page, click the **Save** button.

   Tip: You can delete an existing category by clicking the **Delete Category** button.

6.3.4 Associating Categories with Items

In the Categories list page, all of the uncategorized items display under the *Uncategorized items* heading. Categories must be associated with items through the *Create item* or *View item* windows, which can be done through the Categories list page.

To associate items with categories through the Categories list page:

1. Under the *Uncategorized items* heading, click the **item name** that you want to associated with a category.

   The *View item* window loads.
2. In the Category field, select the category from the dropdown menu.
3. At the base of the page, click the **Save** button.

   When you return to the Categories list, the item displays under its associated category.

6.3.5 Additional Categories List Page Features

Once you have added all of the categories you intend to use in the store, you will want to review the Categories list page and adjust the order your categories.

6.3.5.1 Setting the Display Order for Categories

In the Categories list page, you can determine the order in the categories display in the site as well as the order of the items within each category.

Tip: You may also set the order through the Category's Order field.

To set the categories' display order:

1. Using your cursor, drag the category or item's symbol up or down to the desired order in the table.

   The category or item moves to a new position.

6.4 Adding Discounts to the Store

You may want to configure discounts that payers can receive by entering a coupon code during checkout process.

Discounts are very flexible: they can be assigned only to specific items, be for a percentage off or a flat amount, have a set start date/time and end date/time, and have defined usage limits.

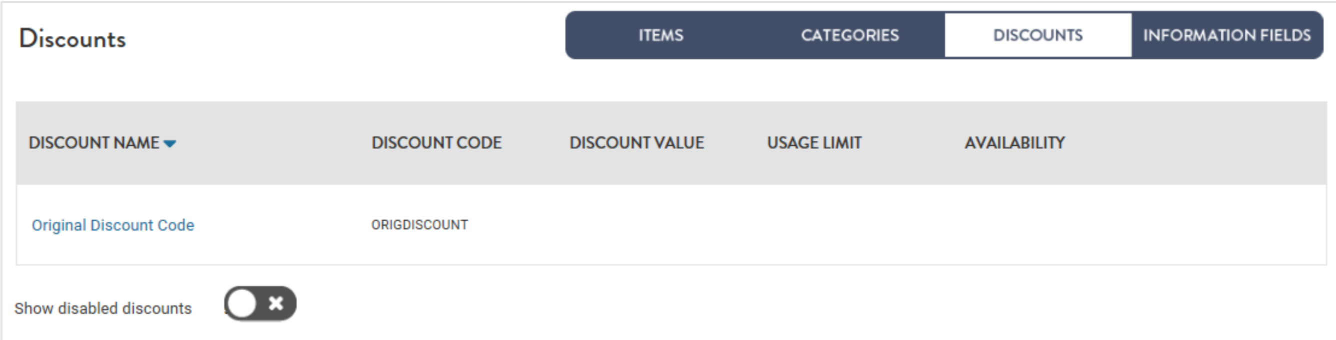
Note: In order to use Discounts in your CASHNet instance, the **Use Discounts** checkbox in Control Parameters must be checked. If it is not checked and you would like to turn on discounts, contact CASHNet Support.

6.4.1 About the Discounts List

When you access the DISCOUNTS sub-tab, the Discounts list page displays all of the discounts currently associated with the store, including important information about the discount(s) in the table.

By default, the ORIGDISCOUNT displays for all stores, which you may ignore or use as your first discount.

Figure 26: Discounts List Page



6.4.2 Creating a New Discount

To create a new discount:

1. Click the **Create discount** button.

   The *Create discount* page loads.

2. Fill in the discount code fields according to the example in Figure 27 and the instructions in Table 17 below.

Figure 27: Example Discount Code Fields

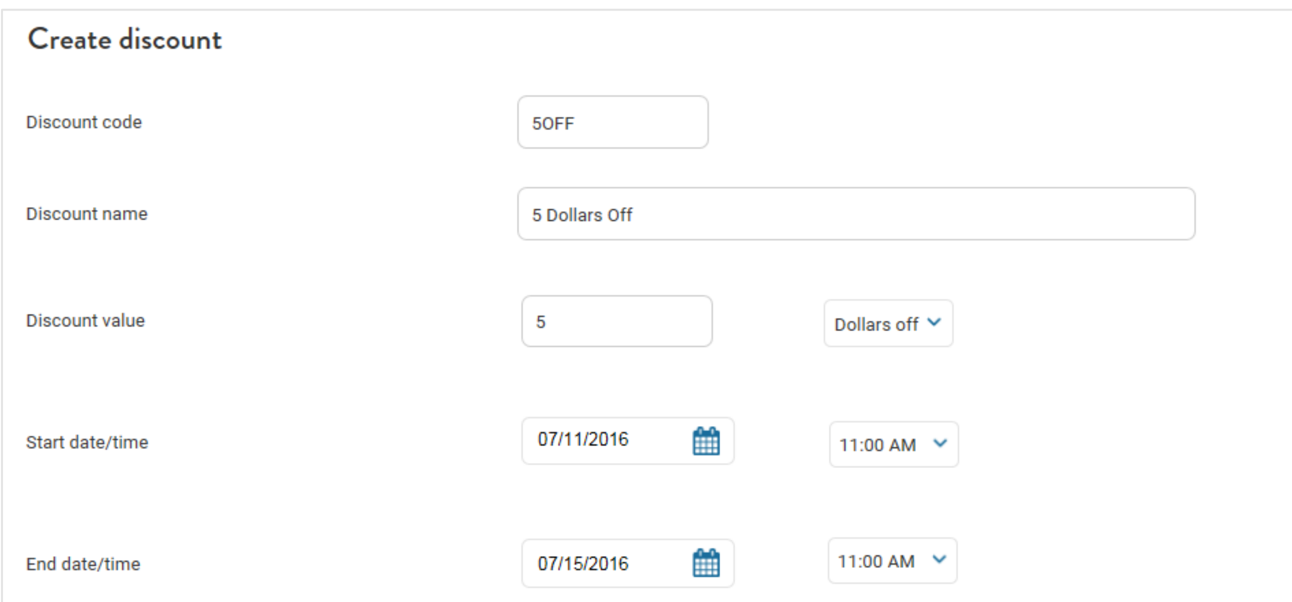


Table 17: Instructions for Discount Code Fields

FIELD NAME	DATA ENTRY INSTRUCTIONS
Discount code	Enter a name for this Discount Code. (12 alphanumeric-character maximum. No spaces allowed.)

FIELD NAME	DATA ENTRY INSTRUCTIONS
Discount name	Enter a description of this Discount Code. (50-character maximum.)
Discount value	In the drop-down, select whether the discount will be a set amount (**Dollars off**) or percentage off (**Percent off**) the purchase of each applicable Item Code. In the field, enter the numerical amount or percentage off.
Start date/time	Select the date and time that the coupon code(s) will be available.
End date/time	Select the date and time that the coupon code(s) will expire.
Select available items	Check any items for which the coupon code(s) should be allowed. To select all items, click **Select all**.
Coupon codes	Select whether you would like to manually enter the coupon code(s) or upload a file of coupon codes. To manually enter a coupon code, click on the **Add Coupon Code** button, enter the code and click on the **Save** button. Repeat this process as many times as necessary. To upload a file of coupon codes, click on the **Upload file** button, select the image, and click on the **Upload** button. When creating a file of coupon codes, enter one coupon code per line. The file type must be .txt, .csv, .xls or .xlsx.
Coupon usage limit	Select how often the coupon may be used: • **Unlimited**: There is no limit to the number of times it may be used. • **Single use**: It may only be used one time. • **Set maximum**: It may be used up to a set number of times, which you indicate in the field.
Allowed customer groups	This field only displays if the site is set to **Allow login** or **Require login** in the Site settings (see Section 5 on page 34). Select whether to restrict coupon usage to specific customer groups: • **All groups**: There is no group restriction. • **Only specific groups**: Only the groups checked below may use the coupon code(s). • **Except specific groups**: All customers NOT in the groups checked below may use the coupon code(s). If you select either of the last two options, check the associated customer groups below.
Discount category code	Select a discount category code to associate with the discount. Once created, this will display by default for all discounts in the store and can

FIELD NAME	DATA ENTRY INSTRUCTIONS
	be changed by clicking the **Change** link.

Tip: To create the category and proceed with creating another one, click **Create another discount**.

3. At the base of the page, click the **Done** button.

6.4.3 Viewing or Modifying a Discount

Once discounts have been created, you can view or modify them through the Discounts list.

To view or modify a discount:

1. In the Discounts list, click the **discount name** that you want to modify.

   The *View discount* page loads.
2. Modify the discount's fields according to the guidelines in Table 17 above.
3. At the base of the page, click the **Save** button.

   Tip: You can delete an existing discount by clicking the **Delete Discount** button.

   Tip: You can copy an existing discount for use in creating a new one by clicking **Copy discount**.

6.5 Adding Information Fields to the Store

You may want to use information fields to collect additional payer information during a transaction. There are two types of information fields: those applied to the transaction or store ("transaction-level"), and those applied to the item ("item-level").

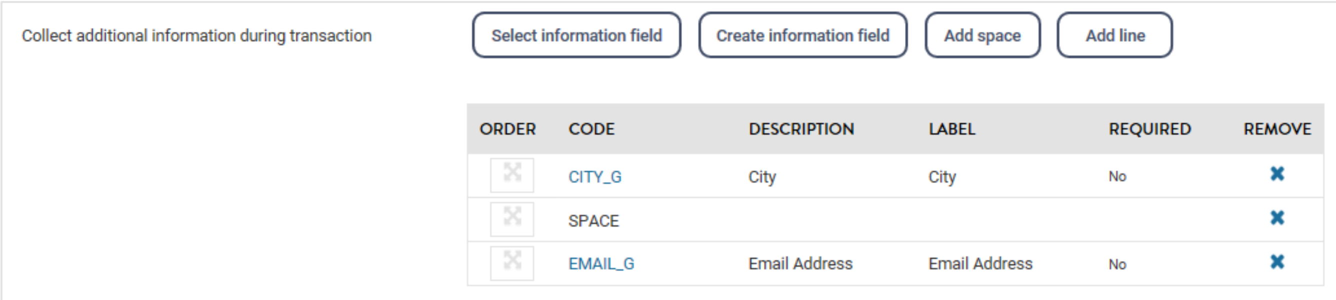
Transaction-level information fields display at the beginning of the checkout process, right after the payer selects Checkout. For example, after entering payment information, the payer is prompted to enter a name or email address that you want to collect.

Item-level information fields display during the item selection process. For example, when selecting a t-shirt, the payer is prompted to select the size of the t-shirt using information fields.

6.5.1 Using the Information Fields Controls in Site and Item Views

In the SITE tab and in the ITEMS tab's *Create item* or *View item* pages, there are information field controls that enable you to select, create, and organize the display of the information fields associated with the site or item.

Figure 28: Information Fields Controls



As you select and create information fields to associate with the site or item, they will appear in the list of information fields. After you have created all of your categories and assigned your items, you will want to review how the categories will display in the store.

You can do this by adding spaces and lines by using the following controls:

- **Add space**: Adds a space to the list, which can be moved in the table to display before and after particular information fields.
- **Add line**: Adds a space to the list, which can be moved in the table to display before and after particular information fields.
- : Allows you to drag the information field or other element up or down to determine the display.
- : Removes the information field or element from the item or site but does not delete it from the CASHNet instance.

6.5.2 Selecting Information Fields

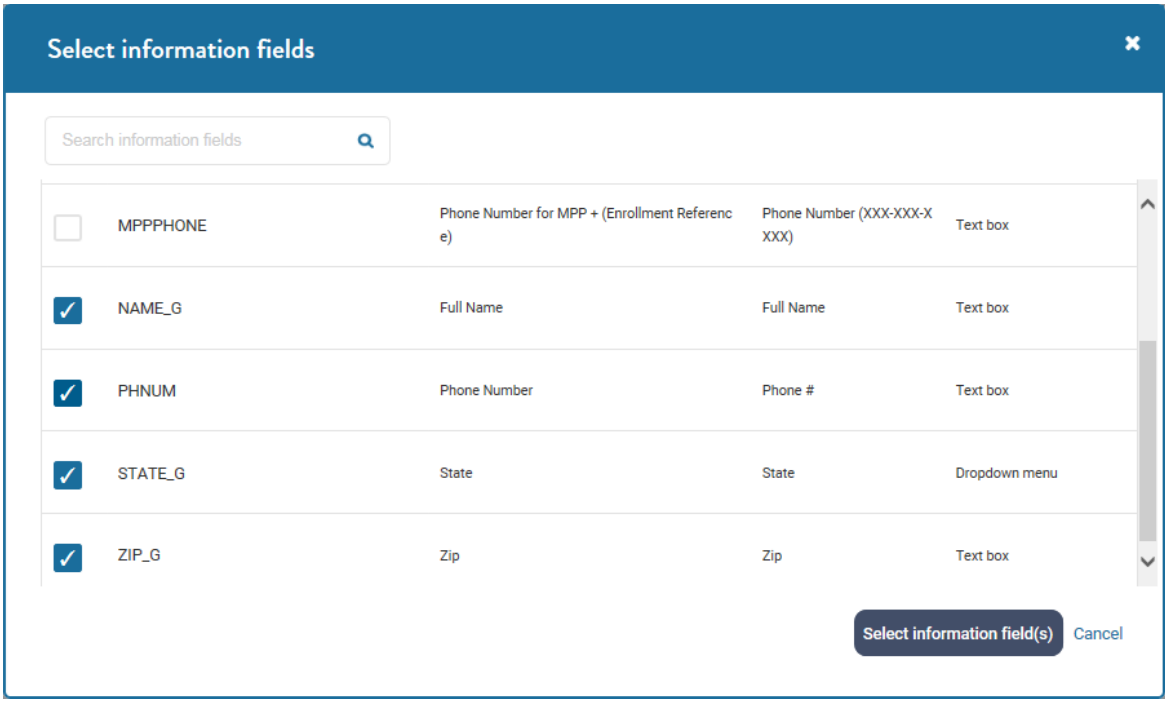
To add information fields that already exist in your CASHNet instance to the site or an item:

1. Click the **Select Information field** button.

   The *Select information fields* window loads.
2. Select the **check box(ex)** next to any information fields that you want to add to the site or item.

   Tip: You can use the search box to filter by information field code or description.

Figure 29: Select Information Fields Window



3. Click the **Select information field(s)** button.

   Store setup returns you to the site or item view and displays your select information fields in the list.

6.5.3 Creating a New Information Field

There are three different scenarios to create new information fields: (1) through the SITE tab, (2) through the ITEMS tab in the *Create item* or *View item* views, and (3) through the INFORMATION FIELDS tab.

Generally, you will want to create the information field through **scenario 1** if the information field is intended to be transaction-level, and through **scenario 2** if the information field is intended to be item-level. In these scenarios, the information field will be assigned immediately to the associated site or item. Scenario 3 is **not recommended** because you must return to the SITE or ITEM tab to assign the information field.

Regardless of which scenario you follow to create the information field, the steps to create it are identical, as described below.

To create a new information field:

1. Click the **Create information** field button.

   The *Create information field* window loads.

2. Fill in the information field code fields according to the example in Figure 30 and the instructions in Table 18 below.

Figure 30: Example Information Field Code Fields

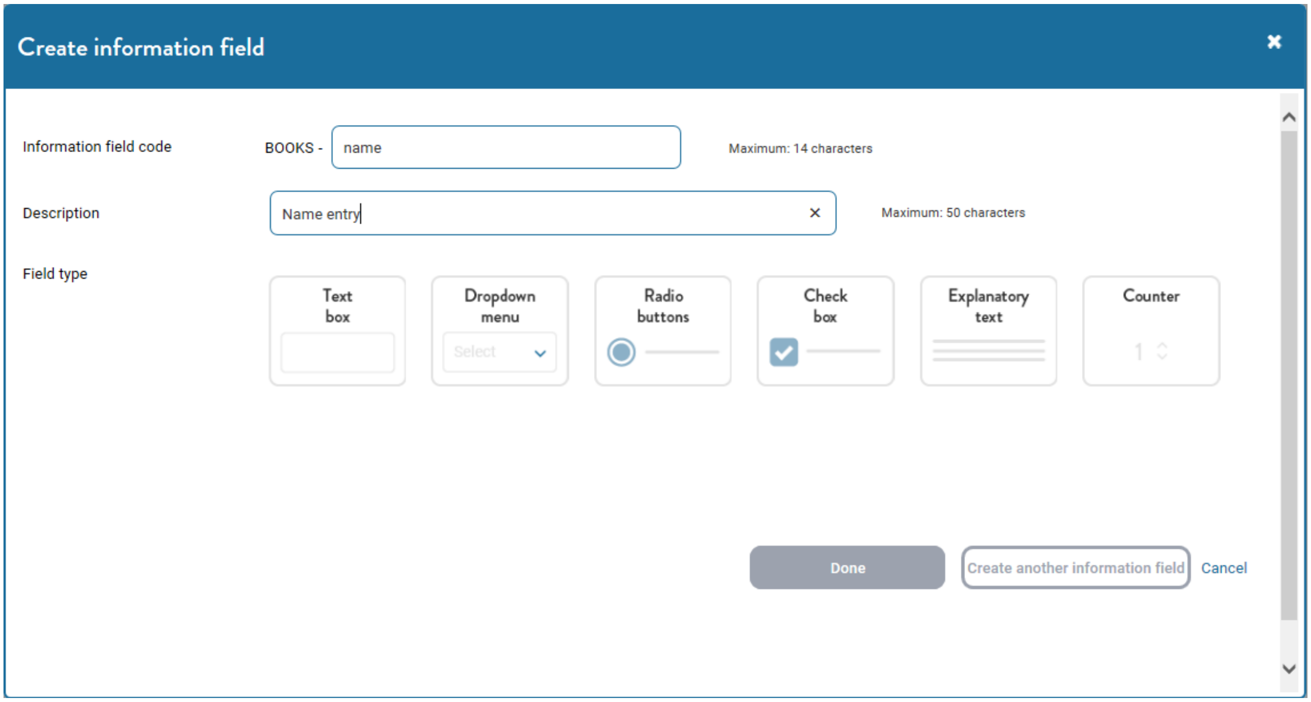


Table 18: Instructions for Information Field Code Fields

FIELD NAME	DATA ENTRY INSTRUCTIONS
Information field code	Enter a name for this information field. (20 alphanumeric-character maximum. No spaces allowed.)
Description	Enter a description of this information field. (50-character maximum.)
Field type	Select how the reference type field will display from the following options: • **Text box**: A text box where the payer will enter requested information. • **Dropdown menu**: The payer will select from multiple options listed in a dropdown menu. • **Radio buttons**: The payer will select from multiple options arranged horizontally by clicking on the circle next to the desired option. • **Check box**: One checkbox that will have a checked value and unchecked value. • **Explanatory text**: This field type is used to display informational text.

FIELD NAME	DATA ENTRY INSTRUCTIONS
	• **Counter**: A numbered value will display, which the payer can increase or decrease.
Text box fields	If you select the **Text box** field type, additional fields display: • Field label: Enter the field prompt that will display on the screen. (50-character maximum.) • Field data type: Select what kind of characters payers may enter: **Alphanumeric**, **Numeric** only, or **Date** formatting. • Characters allowed: Enter the minimum and maximum characters payers may enter. • Update item price (ePayment & eMarket): If you would like this field to be used to change the price of the associated item code, **check** this option. The value entered in the field or selected will be used to update the item price. • Required field: **Check** this checkbox if the information should be a required field. • Remember value: **Check** this checkbox if CASHNet should remember the information field's value entered by a payer the next time the same payer views the information field. • Show on receipt: **Check** this checkbox if the value associated with the information field should display on the payer's receipt. • Shown on endorsement: **Check** this checkbox if the data associated with the information field should display on the endorsement of a source document.

Dropdown menu fields	If you select the **Dropdown menu** field type, additional fields/UI elements display:
	• Field label: Enter the field prompt that will display on the screen. (50-character maximum.)
	• Default sort order: Select how the fields should be sorted from the available options.
	    ○ **As entered**: According to the order listed below.
	    ○ **Description**: Alphanumerically by the description label.
	    ○ **Value**: In ascending order by value.
	    ○ **Price**: In ascending order by price.
	• Order: If using the **As entered** order option, use the symbol to drag the options to set the display order.
	• Description: Enter a description of the value that will display on the

FIELD NAME	DATA ENTRY INSTRUCTIONS
	screen. • Value: Enter the value that will be saved in the database when the option is selected. • Price: If desired, enter the numeric value that should be added to the price of the associated item code when this option is selected. If no value is entered, no amount will display next to the description. • **Default**: Normally a default value does not exist for dropdown menu options. If you would like to select a default value, click the Default button for that option. • **Remove**: To delete a dropdown option, click the ✖ symbol. • **Add another row**: To add another dropdown option, click this link. • Update item price (ePayment & eMarket): If you would like this field to be used to change the price of the associated item code, **check** this option. The value entered in the field or selected will be used to update the item price. • Required field: **Check** this checkbox if the information should be a required field. • Remember value: **Check** this checkbox if CASHNet should remember the information field's value entered by a payer the next time the same payer views the information field. • Show on receipt: **Check** this checkbox if the value associated with the information field should display on the payer's receipt. • Shown on endorsement: **Check** this checkbox if the data associated with the information field should display on the endorsement of a source document.

Radio buttons fields	If you select the **Radio buttons** field type, additional fields/UI elements display:
	• Field label: Enter the field prompt that will display on the screen. (50-character maximum.)
	• Default sort order: Select how the fields should be sorted from the available options.
	  ○ **As entered**: According to the order listed below.
	  ○ **Description**: Alphanumerically by the description label.
	  ○ **Value**: In ascending order by value.
	  ○ **Price**: In ascending order by price.
	• Order: If using the **As entered** order option, use the symbol to

FIELD NAME	DATA ENTRY INSTRUCTIONS
	drag the options to set the display order. • Description: Enter a description of the value that will display on the screen. • Value: Enter the value that will be saved in the database when the option is selected. • Price: If desired, enter the numeric value that should be added to the price of the associated item code when this option is selected. If no value is entered, no amount will display next to the description. • **Default**: Normally a default value does not exist for radio button menu options. If you would like to select a default value, click the Default button for that option. • **Remove**: To delete a radio button option, click the ✖ symbol. • **Add another radio button**: To add another radio button option, click this link. • Update item price (ePayment & eMarket): If you would like this field to be used to change the price of the associated item code, **check** this option. The value entered in the field or selected will be used to update the item price. • Required field: **Check** this checkbox if the information should be a required field. • Remember value: **Check** this checkbox if CASHNet should remember the information field's value entered by a payer the next time the same customer views the information field. • Show on receipt: **Check** this checkbox if the value associated with the information field should display on the payer's receipt. • Shown on endorsement: **Check** this checkbox if the data associated with the information field should display on the endorsement of a source document.
Check box fields	If you select the **Check box** field type, additional fields display: • Field label: Enter the field prompt that will display on the screen. (50-character maximum.) • Checked value: Enter the value to be indicated by a check. (10-character maximum.) • Unchecked value: Enter the value to be indicated by a blank in the checkbox. (10-character maximum.) • Default to checked: Normally the check box will be unchecked by

FIELD NAME	DATA ENTRY INSTRUCTIONS
	default. However, if you would like it to default to checked, turn on this option. • Update item price (ePayment & eMarket): If you would like this field to be used to change the price of the associated item code, **check** this option. The value entered in the field or selected will be used to update the item price. • Remember value: **Check** this checkbox if CASHNet should remember the information field's value entered by a payer the next time the same payer views the information field. • Show on receipt: **Check** this checkbox if the value associated with the information field should display on the payer's receipt. • Shown on endorsement: **Check** this checkbox if the data associated with the information field should display on the endorsement of a source document.
Explanatory text fields	Use the HTML editor to enter the text that will display.
Counter fields	If you select the **Counter** field type, an additional field displays: Start number: Enter the value at which the counter starts by default.

Tip: To preview how the information field will display to the payer, click the **Preview** button.

Tip: To create the category and proceed with creating another one, click **Create another information field**.

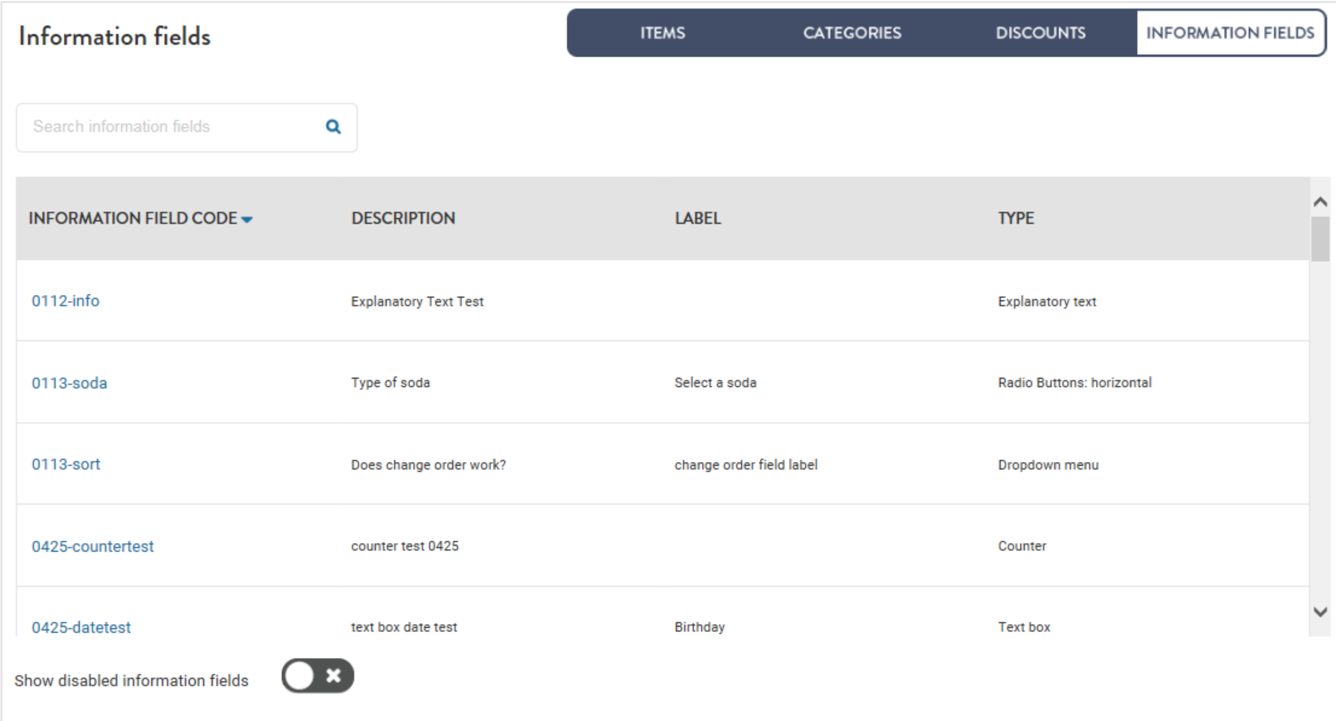
3. Click the **Save** button.

6.5.4 About the Information Fields List

When you access the *Information fields* list page, all of the available information fields in your CASHNet instance display in the table.

You can view important information about the information directly in the table, create new information fields, or view or modify existing information fields.

Figure 31: Information Fields List Page



6.5.5 Viewing or Modifying an Information Field

To view or modify an information field:

1. In the *Information fields* list, click the **information field code** that you want to modify.

   A warning loads, informing you that the information field was created elsewhere.

2. If you want to proceed, click the **OK** button.

   The *View information field* page loads.

3. Modify the information field according to the guidelines in Section 6.5.2 above.
4. At the base of the page, click the **Save** button.

   Tip: You can disable an existing information field by clicking the **Disable information field** button.

   Tip: You can copy an existing information field for use in creating a new one by clicking **Copy information field**.

7 Layout Settings

The LAYOUT tab determines the display of the site, including the logo and fonts, colors, and text on the various pages.

The LAYOUT tab is divided into three main sub-tabs: DISPLAY & IMAGES, COLORS, and CUSTOM MESSAGES.

7.1 Display & Images

The DISPLAY & IMAGES sub-tab determines the site's settings main display settings across all pages.

To set the display & images settings:

1. In the layout tab, click the **DISPLAY & IMAGES** tab.
2. Fill in the display and images fields according to the example in Figure 32 and the instructions in Table 19 below.

Figure 32: Example Display & Images Fields

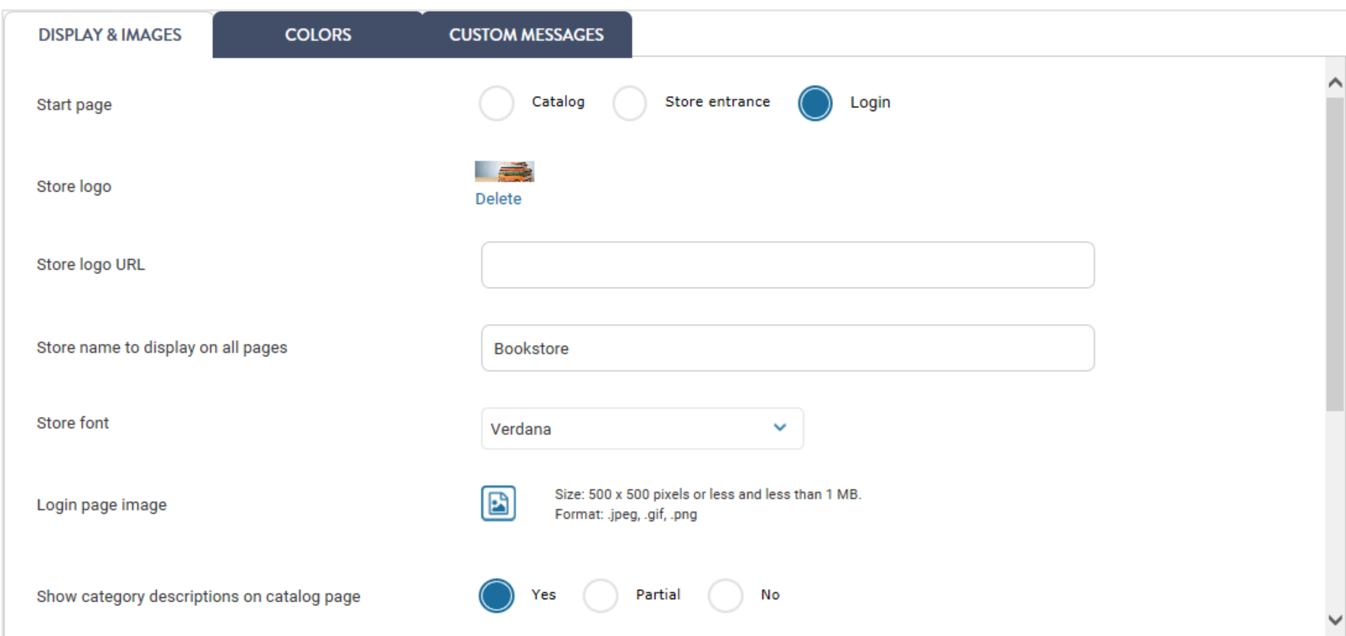


Table 19: Instructions for Display & Images Fields

FIELD NAME	DATA ENTRY INSTRUCTIONS
Start page	**Note:** This field only displays for **Storefront** store types. Select the eMarket storefront home page from the available options: • **Catalog**: This page may include a logo, featured products, new products, categories, all items that have not been assigned to a category, a shopping basket and the following links: your account (if login is available), browse catalog, basket and sign out (if signed in). • **Store entrance**: This page may include a logo, banner, featured products, new products, categories and the following links: home, your account (if login is available), browse catalog, basket and sign out (if signed in). • **Login page**: This option only displays if store login is optional or required. This page may include a logo, banner, a section for registered users to login, a button for new users to click on to register and the following links: your account, browse catalog, and basket.
Store logo	Click the **image** to upload a store logo. Logos must be formatted to 965 x 225 pixels or less and less than 1 MB. To replace the image, click the **Remove Image** button and then click the image to select a different image.
Store logo URL	Enter the URL address that the user will be directed to when clicking the store logo. Leave blank to default to the store home page. **Note:** Be sure to include http:// or https:// at the beginning of the URL.
Store name to display on all pages	Enter a name for the site if desired. The name will appear near the store logo at the top of each screen. (50-character maximum.)
Store font	Select the store font to be used throughout the site from the available options: • Arial • Times New Roman • Verdana
Login page image	If payer will access the login page for your store and you would like to replace the default image, click on the **Image** button to select a replacement. Size: 500 x 500 pixels or less and less than 1 MB. Format: .jpeg, .gif, .png
Store entrance banner	**Note:** This field only displays for **Storefront** store types AND

FIELD NAME	DATA ENTRY INSTRUCTIONS
image(s)	when the store Start page is set to **Store entrance**. Click the **image** to select up to five different banner images. One banner will display at a time and each time the page is accessed, a different banner may display. Size: 625 x 225 pixels and less than 1 MB. Format: .jpeg, .gif, .png
Show category descriptions on catalog page	**Note:** This field only displays for **Storefront** store types. Select how you want category descriptions to display from the available options: • **Yes**: Display each category's entire description. • **Partial**: Display the first 70 characters of each category's description followed by ellipses. • **No**: Don't display the category description in the catalog of items.
Show item descriptions on catalog page	**Note:** This field only displays for **Storefront** store types. Select how you want item descriptions to display from the available options: • **Yes**: Display each item's entire description. • **Partial**: Display the first 70 characters of each item's description followed by ellipses. • **No**: Don't display the item description in the catalog of items.
Hide item prices on catalog page	**Note:** This field only displays for **Storefront** store types. **Check** this option if you don't want item prices to appear on the eMarket Browse Catalog page.
Use placeholder images	**Note:** This field only displays for **Storefront** store types. **Check** this option to have a placeholder image will display for any item that does not have an image stored. To view the placeholder image, click **View placeholder image**.
Store list page image (iPad app only)	**Note:** This field only displays for **Storefront** store types. If you are using the iPad app, you can upload an image to display for your storefront in the list of storefronts on the iPad. Click on the **image** to upload an image. Size: 300 x 300 pixels and less than 1 MB. Format: .jpeg, .gif, .png

3. At the top of the page, click the **COLORS** tab to continue the layout configuration.

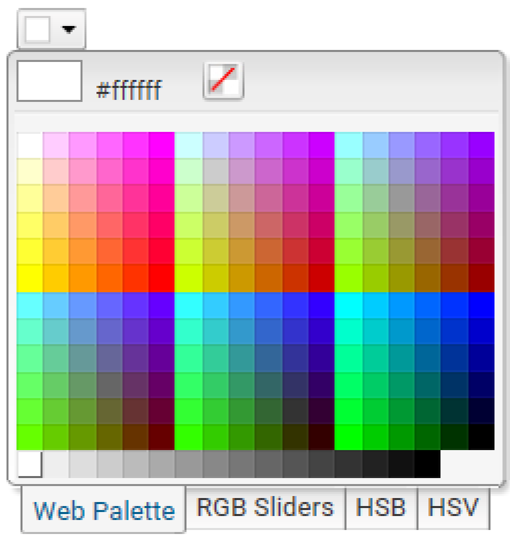
7.2 Colors

The COLORS sub-tab determines the site's colors for various site elements including different pages, menus, and types of text.

Each site will come with default colors for each element, which you can use as a starting point for determining your site colors.

There are a variety of tools you can use to determine the color, including hexadecimal codes, a web palette, RGB sliders, an HSB selector, and an HSV selector. To access these tools, click the color dropdown, then use the dropdown to select your preferred color selector, select your color, and click **Apply**.

Figure 33: Color Selection Dropdown



To set the colors settings:

1. Select the colors you want for each element listed in the colors fields in Figure 34 using the color map in Figure 35 below.

Figure 34: Example Colors Fields

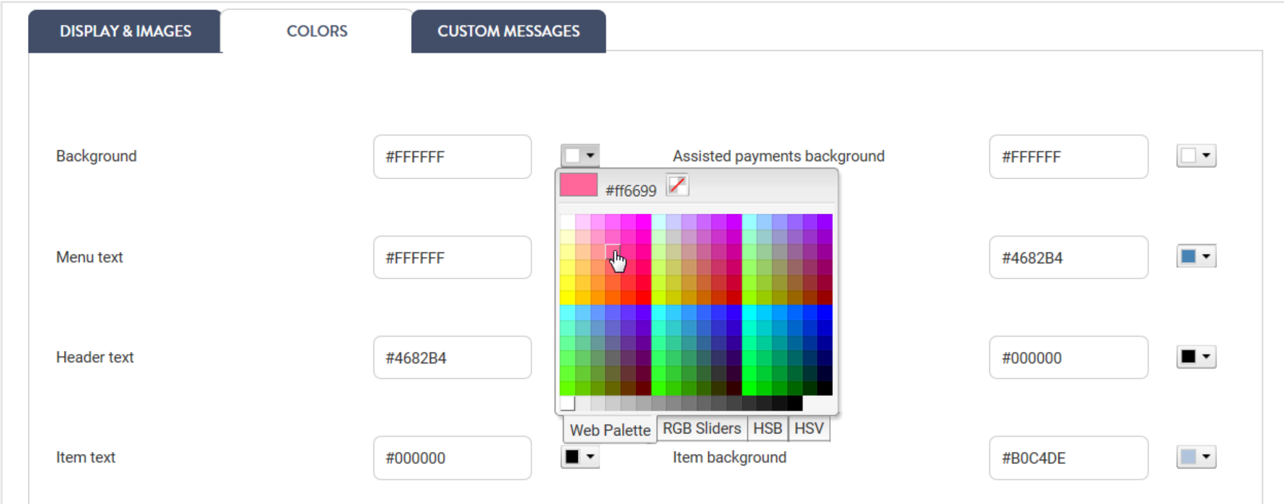
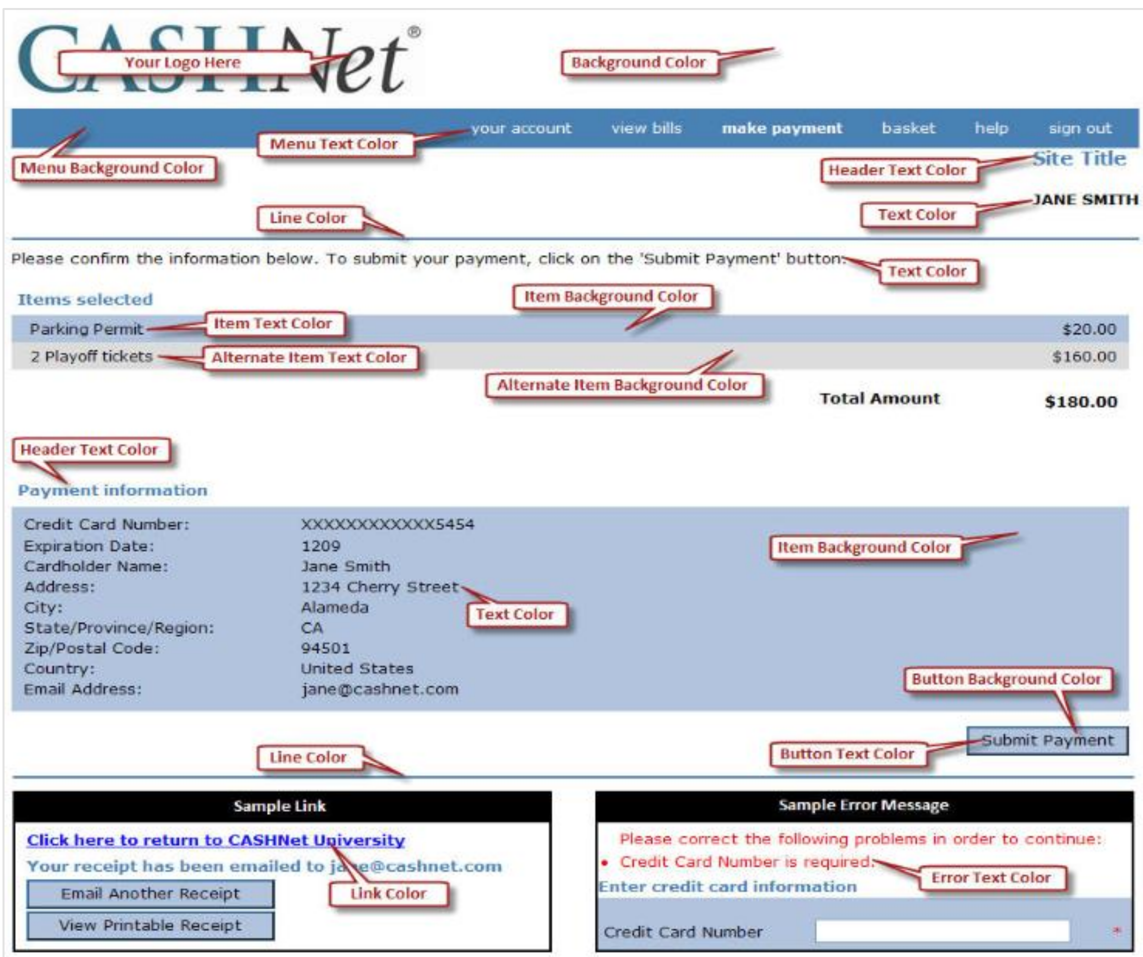


Figure 35: Colors Label Map



2. Click the **CUSTOM MESSAGES** tab to continue the layout configuration.

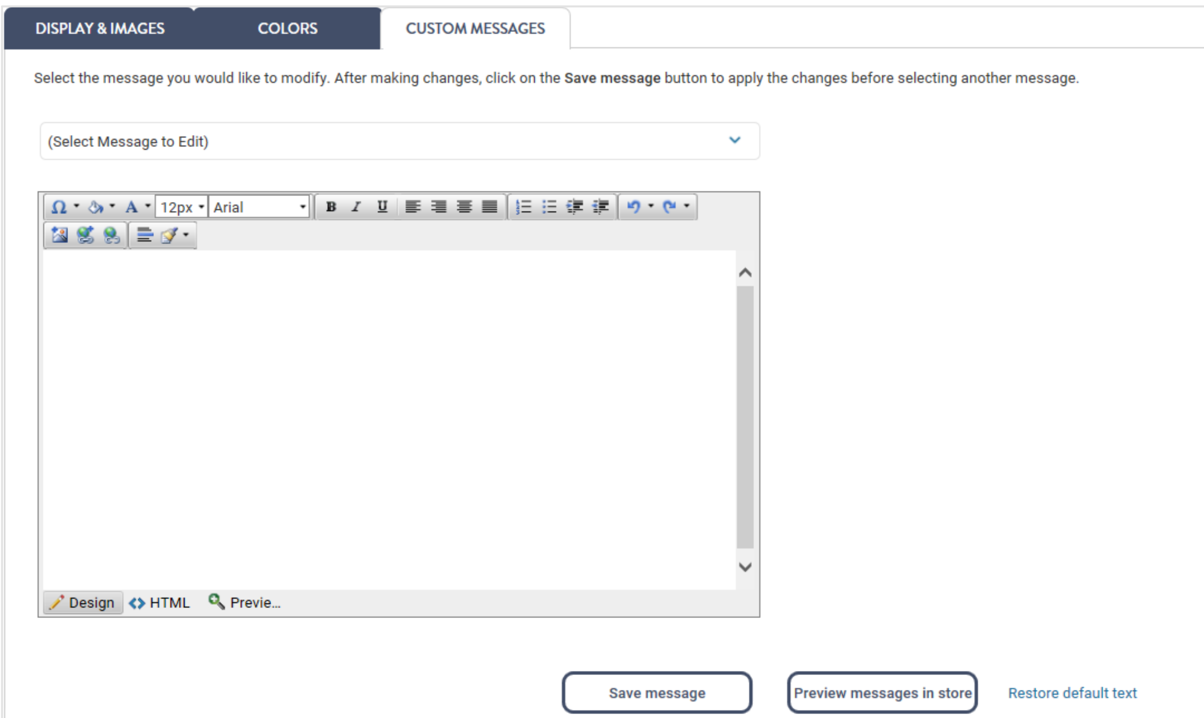
7.3 Custom Messages

The CUSTOM MESSAGES sub-tab determines certain text that displays on the site as well as in notifications, receipts, and the help center.

7.3.1 Custom Message Tools

The *Select Message to Edit* drop-down menu lists all of the custom messages that you can edit. Most Custom Messages have default text, which you may use or modify to fit your site.

Figure 36: Custom Messages Drop-Down



The Custom Messages page contains the following controls:

- **Save message**: To save changes made to a custom message, click this button.
- **Preview messages in store**: To view how a custom message displays in the store, open a custom message and click this button.
- **Restore default text**: To change a custom message's text back to its default text, click this button when the custom message is selected. To change ALL of the custom messages back to their default text, click this button when the *(Select Messages to Edit)* text is displayed in the dropdown.

- **Design:** To view the standard WYSIWIG text editor content, open a custom message and click this button at the base of the text editor.
- **HTML**: To view the HTML format of the text, open a custom message and click this button at the base of the text editor.
- **Preview**: To preview the formatted text, open a custom message and click this button at the base of the text editor.

7.3.2 Modifying Custom Messages

To modify a custom message:

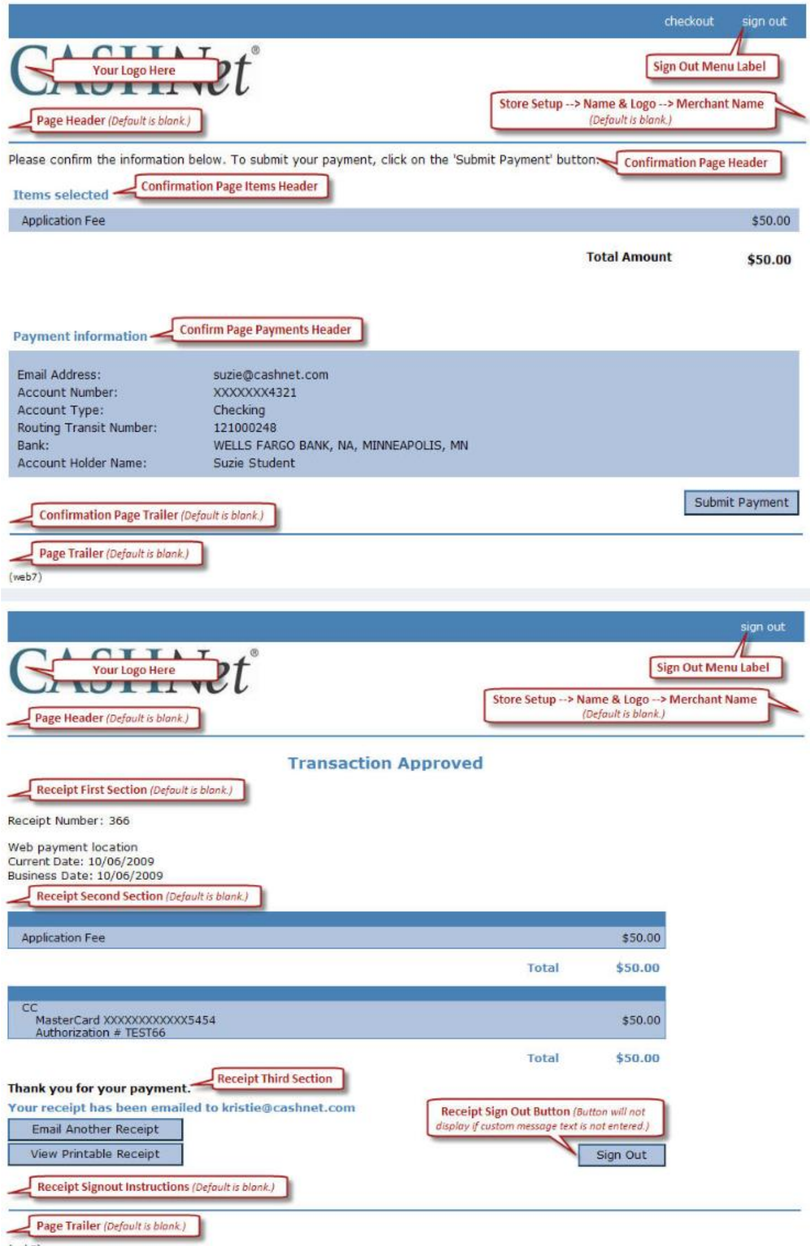
1. In the *Select Message to Edit* drop-down, scroll to and select a custom message.

   Note: Refer to Section 7.3.3 below to determine where most of the relevant custom messages will display in your eMarket state. Additionally, you may use the **Preview messages in store** button, described above, and the *ePayment & eMarket User Manual* contains the complete of Custom Messages, their corresponding default text, and whether they are available in ePayment, eMarket storefront, or eMarket checkout.
2. Use the text editor to enter and format the text and images.
3. Click the **Save message** button to save any changes made to a custom message.
4. When you have completed saving your custom messages, click **Next** to continue to the Notifications settings (see Section 8 on page 74).

7.3.3 Custom Messages Map

Figure 37: Custom Messages Map 1 of 2

Figure 38: Custom Messages Map 2 of 2



8 Notifications Settings

The NOTIFICATIONS tab determines the CASHNet system notifications that will be sent to the client system(s) as well as the email notification settings that will be sent to the payer.

To set your notification settings:

1. If not already active, click the **NOTIFICATIONS** tab.
2. Fill in the *CASHNet system notifications* fields according to the example in Figure 39 and the instructions in Table 20 below.

Figure 39: Example CASHNet System Notifications Fields

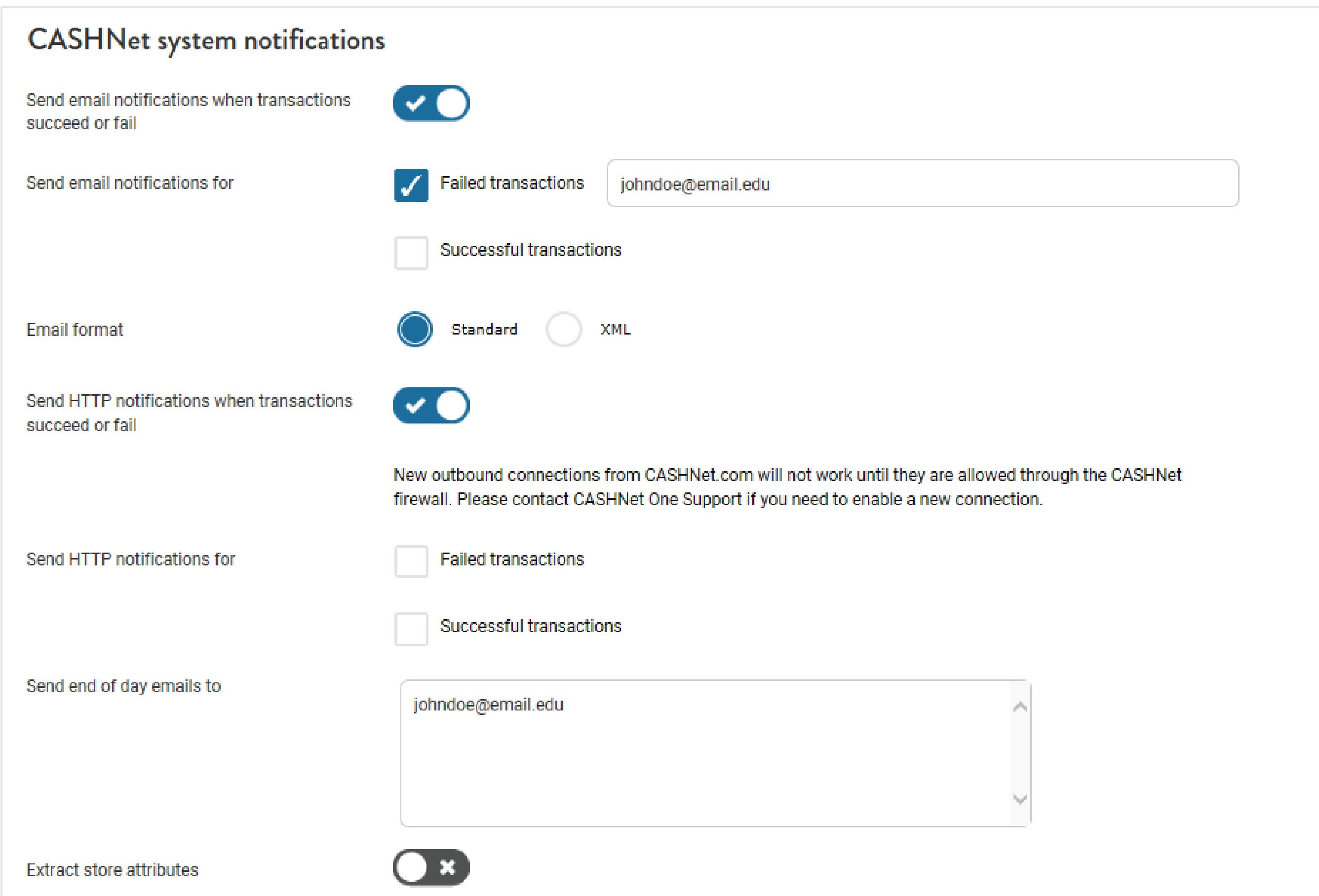


Table 20: Instructions for CASHNet System Notifications Fields

FIELD NAME	DATA ENTRY INSTRUCTIONS
Send email notifications when transactions succeed	Check this option if you would like to receive email notifications for either successful or failed transactions or both. When checked, the

FIELD NAME	DATA ENTRY INSTRUCTIONS
or fail	following additional fields load: Send email notifications for: • **Failed transactions**: Check to receive emails for failed transactions, then enter the email address(es) separated by semicolons of the email addresses to receive those notifications. • **Successful transactions**: Check to receive emails for successful transactions, then enter the email address(es) separated by semicolons of the email addresses to receive those notifications. • Email format: Select whether you want to receive emails in **Standard** or **XML** format.
Send HTTP notifications when transactions succeed or fail	Check this option if you would like to receive HTTP notifications for either successful or failed transactions or both. When checked, the following additional fields load: Send HTTP notifications for: • **Failed transactions**: Check to receive HTTP notifications for failed transactions, then enter the URL to receive those notifications. • **Successful transactions**: Check to receive HTTP notifications for failed transactions, then enter the URL to receive those notifications. HTTP format: Select whether you want to receive HTTP notifications in **GET – XML**, **GET – Name value**, or **POST – Name value** format. **Note:** New outbound connections from CASHNet.com will not work until they are allowed through the CASHNet firewall. Please contact CASHNet Support if you need to enable a new connection. If an HTTP notification fails, an email will be sent to the address(es) specified in the Send end of day emails to field.
Send end of day emails to	Enter administrator email address(es) that should receive notifications for this merchant's at the end of the day. (Use a semicolon to separate multiple addresses.)
Extract store attributes	Check this option if you would like to extract any store attributes. You have the ability to define up to four additional station code attributes based on your institution's policies and procedures. These fields are used for extract purposes. (50-character maximum.)

3. Fill in the *Customer notifications* fields according to the example in Figure 40 and the instructions in Table 21 below.

Figure 40: Example Customer Notifications Fields

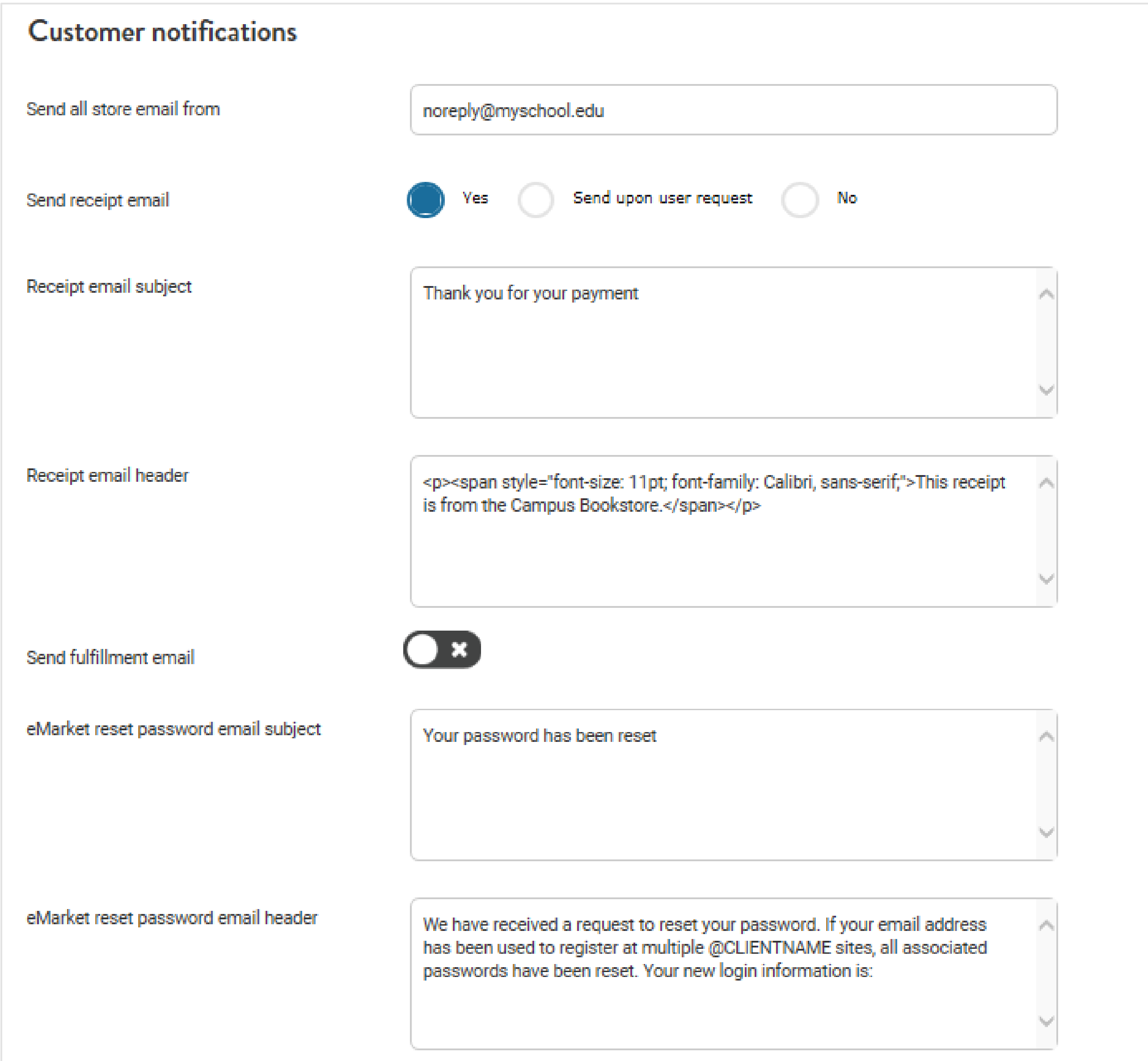


Table 21: Instructions for Customer Notifications Fields

FIELD NAME	DATA ENTRY INSTRUCTIONS
Send all store email from	Enter the email address from which all store notifications should be sent. You may want to use an address such as `noreply@yourdomain.edu`.
Send receipt email	Select whether payers should be sent receipt emails from the available options: • **Yes**: Always send an email and prompt the user to enter or change their email address. • **Send upon user request**: Allow the user to select whether to

FIELD NAME	DATA ENTRY INSTRUCTIONS
	receive an email. • **No**: Do not send receipt emails.
Receipt email subject	**Note:** This field only displays if Send receipt email is set to **Yes** or **Send upon user request**. Use this field to modify the default text that displays in the email subject line for receipts.
Receipt email header	**Note:** This field only displays if Send receipt email is set to **Yes** or **Send upon user request**. Use this field to modify the default text that displays at the top of receipt emails.
Show customer name on receipt	**Note:** This field only displays if Send receipt email is set to **Yes** or **Send upon user request**. Select whether you want the payer's name to display in the receipt email.
Send fulfillment email	Uncheck this option if you don't want to send fulfillment emails. This field is **checked** by default.
Fulfillment email subject	**Note:** This field only displays if Send fulfillment email is **checked**. Use this field to modify the default text that displays in the email subject line for fulfillment emails.
Fulfillment email header	**Note:** This field only displays if Send fulfillment email is **checked**. Use this field to modify the default text that displays at the top of fulfillment emails.
eMarket reset password email subject	**Note:** This field only displays if you selected **Only guest users** or **Allow login** in the site's login settings. Use this field to modify the default text that displays in the email subject line for eMarket password reset emails.
eMarket reset password email header	**Note:** This field only displays if you selected **Only guest users** or **Allow login** in the site's login settings. Use this field to modify the default text that displays at the top of the eMarket password reset emails.

4. At the base of the page, click the **Next** button to continue to Review and Publish your store settings (see Section 9 below).

9 Review and Publish

When you are publishing a store for the first time, the PUBLISH tab displays all of your site, items, layout, and notifications settings in a single page, enabling you to review the store prior to publication.

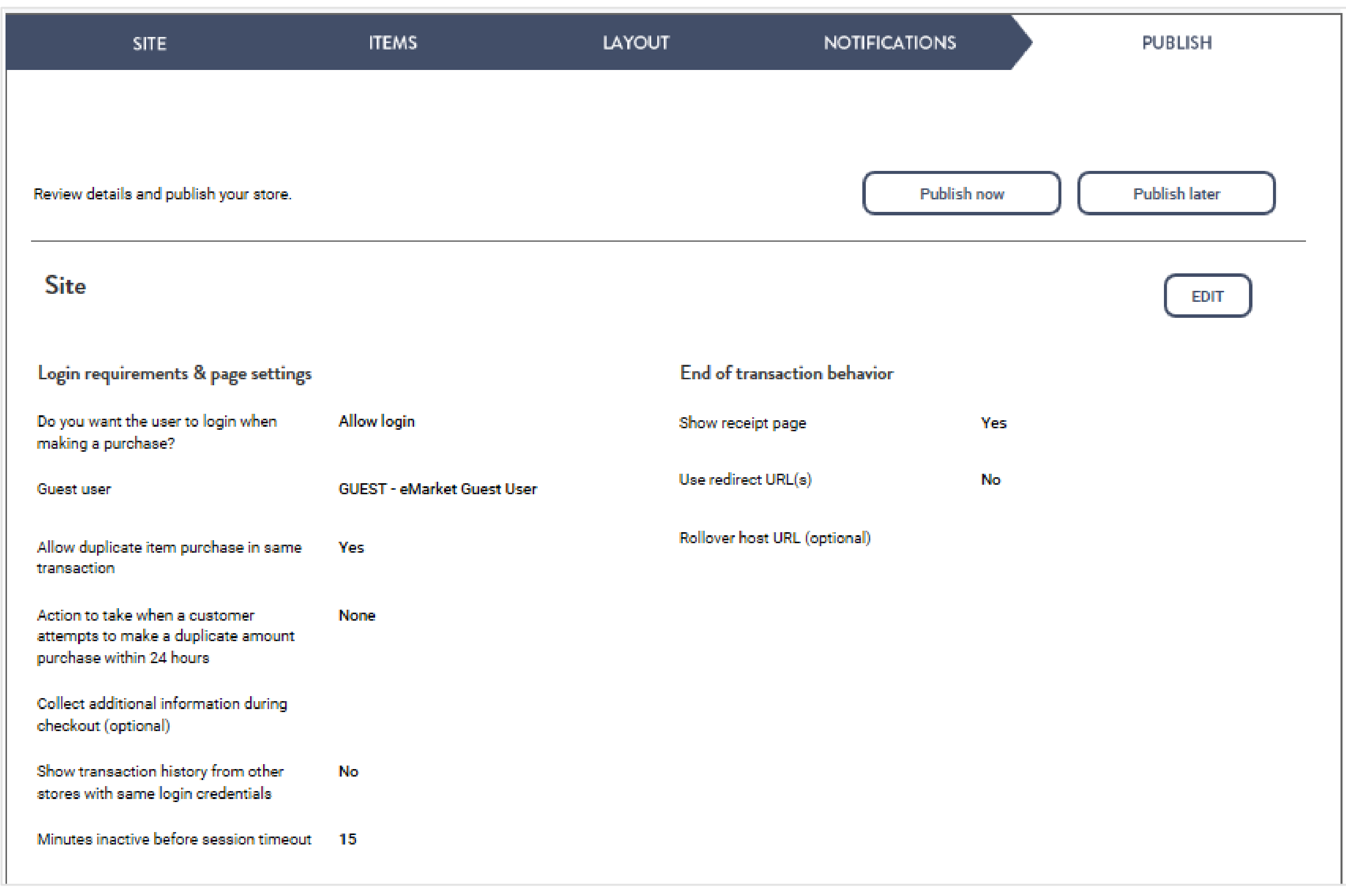
9.1 Reviewing Your Store

Use the PUBLISH tab to scroll through all of your store's settings and verify that they are correct.

Note: The review information contains less detail than the individual section tabs. To see more detail, navigate back to the section tab.

Note: In the Items sub-section, you can click the different sub-tabs to view all of the items, categories, discounts, and information fields associated with the store.

Figure 41: Example Publish Site Section



9.1.1 Editing Your Store

If you notice anything in the store's settings you want to modify:

1. Click the **EDIT** button at the top of the associated section.

   The associated store setup tab loads, where you can make your changes.
2. Follow the instructions listed in the associated section to modify the settings and save your changes.
3. Click the **PUBLISH** tab to return to reviewing your store.

9.1.2 Previewing Your Store

Before publishing your store, you will want to preview it.

To preview and test your store:

1. If your store allows login, ensure that you have a test customer ID that you can use to test the store.
2. Click the **Preview** button.

   The store loads in a new browser tab.
3. Navigate through the store, ensuring that all of the settings are correct.

9.2 Publishing Your Store

When you are ready to publish your store, you can publish it right away or schedule it to be published at a specific time.

9.2.1 Publishing Now

To publish your store right away:

1. Click the **Publish now** button.

   A *Publish now* window loads.
2. Click the **Yes, publish** button.

9.2.2 Publishing Later

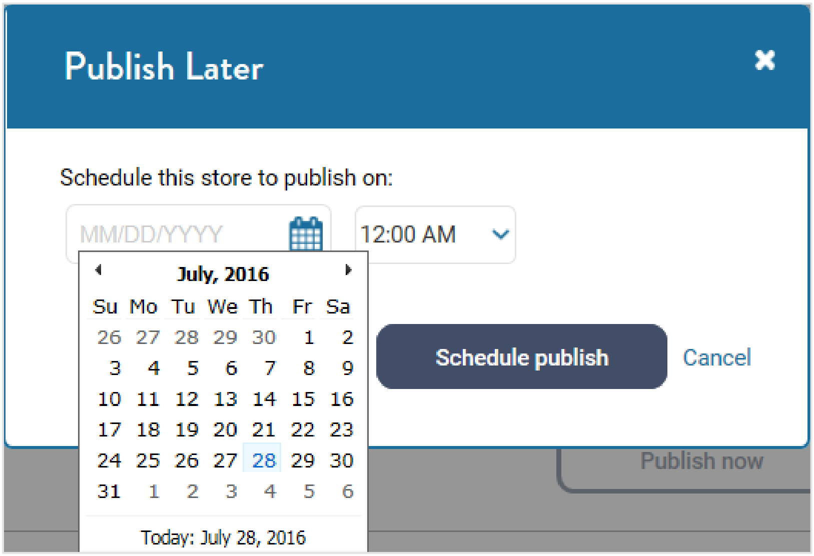
To schedule your store for publication at a specific time:

1. Click the **Publish later** button.

A *Publish Later* window loads.

2. Use the calendar and time fields to select a date and time.

Figure 42: Calendar in Publish Later Window

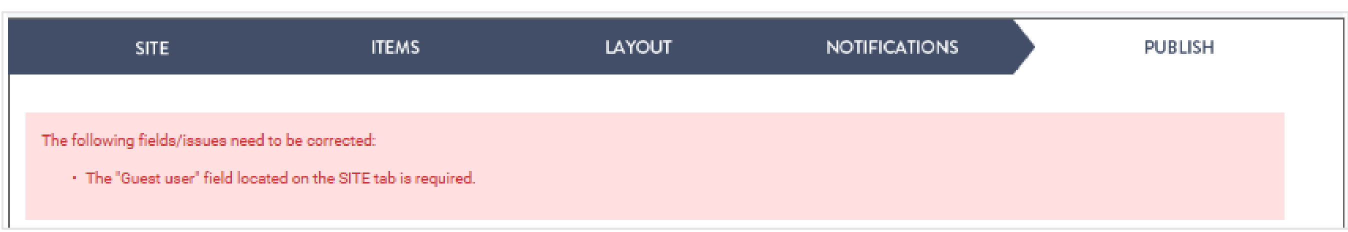


3. Click **Schedule publish**.

9.2.3 Resolving Publish Errors

After publishing your store, store setup will verify that all or your settings are compatible with CASHNet's store configuration requirements. If there are issues, detailed error messages will display at the top of the PUBLISH tab, describing what actions you need to take to resolve the issue(s).

Figure 43: Example Publish Error Message



To fix publish errors:

1. Use store setup to navigate the tab or section listed in the error message.
2. Make the required changes listed in the error message.
3. Save your changes and click the **PUBLISH** tab to return to reviewing and publishing your store.

Appendix A Merchant-Security

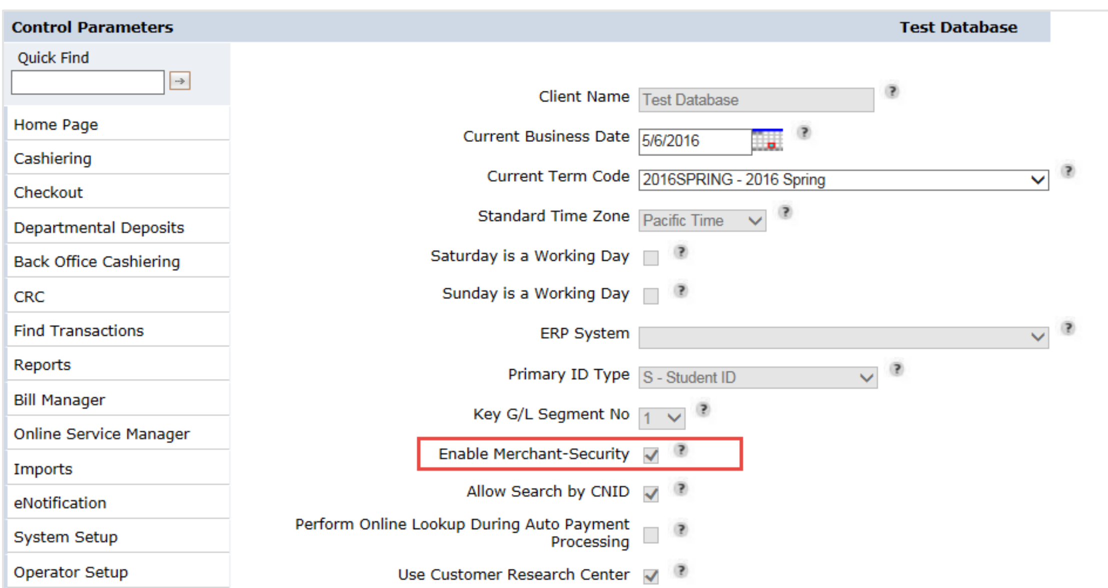
Merchant security enables you to grant permissions to operators so they can maintain multiple eMarket stores with different levels of permission.

Enabling Merchant-Security

To confirm that merchant-security is enabled for your CASHNet instance, navigate to **System Setup > Control Parameters** and verify that the **Enable Merchant-Security** checkbox is checked.

Note: If merchant-security is turned off and you would like it enabled, contact a CASHNet representative.

Figure 44: Enable Merchant-Security Checkbox



Creating Merchant Profiles

When merchant-security is enabled, you can configure merchant profiles. Each merchant profile is a different set of permissions that can be assigned to an operator for individual eMarket stores.

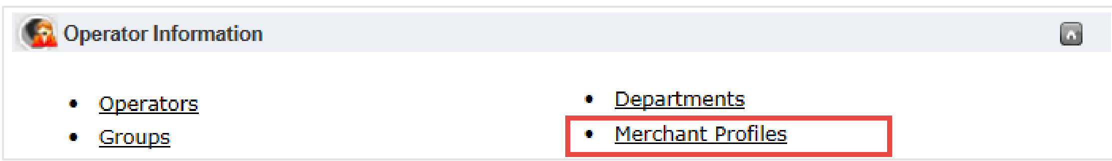
Note: There are several roles you may wish to assign to operators. For example, a Reporting role would only allow inquiry and reporting access to an eMarket. A Business Office role might also allow voids and reversals, assisted payments, and order fulfillment. A back-end

Administrative role might allow only access to the store setup but no inquiry, reporting, or business office tasks.

To create a merchant profile:

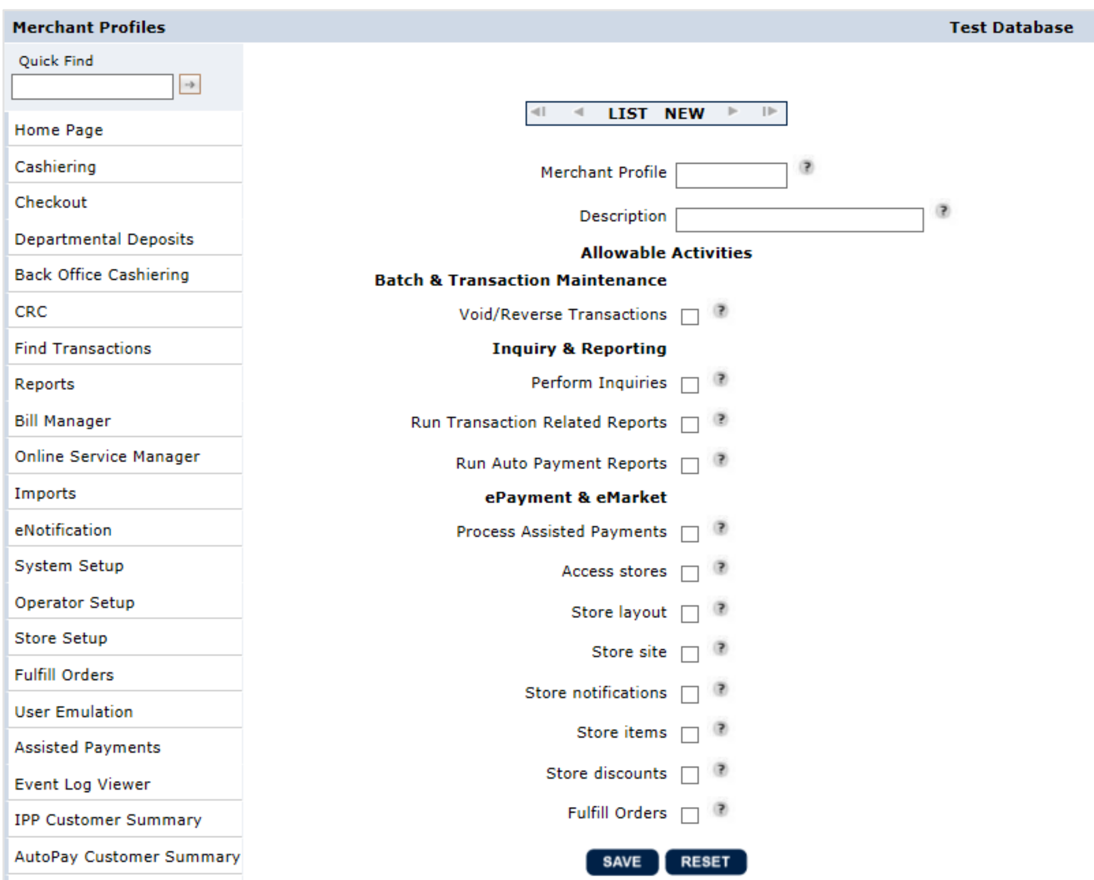
1. Click **System Setup**.
2. In the *Operator Information* section, click the **Merchant Profiles** link.

Figure 45: Merchant Profiles Link



3. Click **Add New Record**.
4. Use the Merchant Profile page to define the merchant profile.

Figure 46: Merchant Profile Record



5. At the base of the page, click the **Save** button.

Assigning Merchant Profiles to Operators

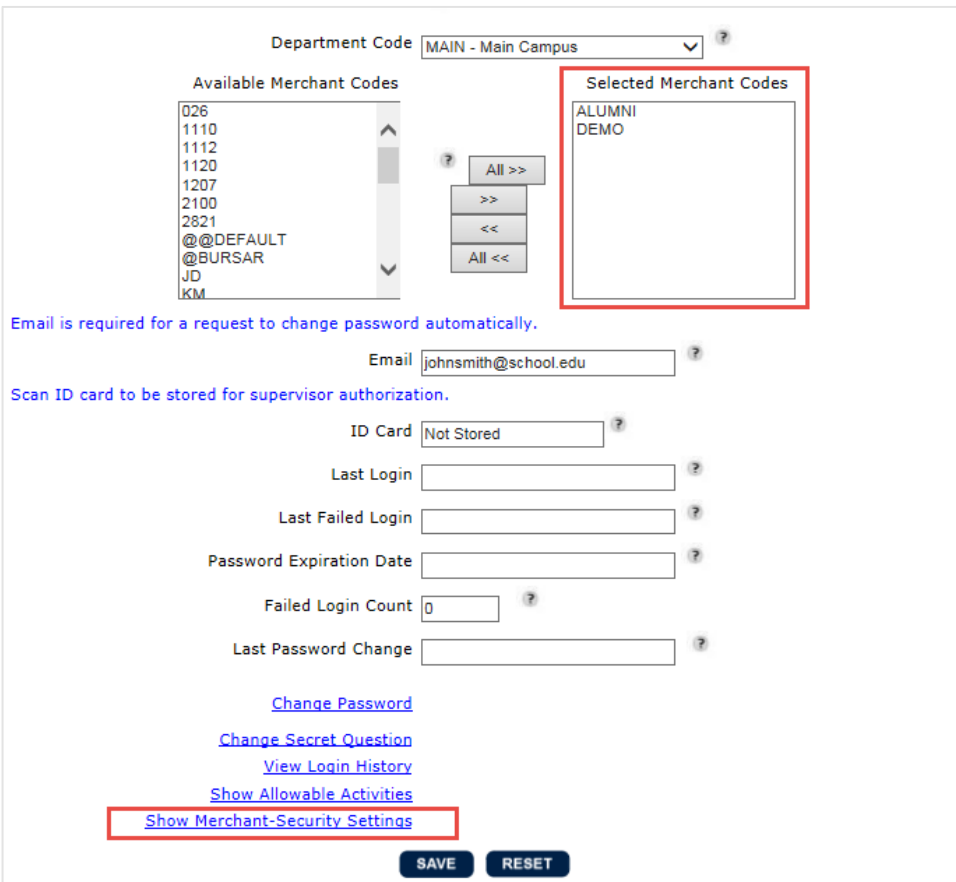
Once you have created your merchant profiles, you can assign the distinct merchant permissions to your operators for different eMarket stores.

To assign a merchant profile to an operator:

1. In the left hand menu, click **Operator Setup**.
2. Make sure the operator has access to stores in the **Selected Merchant Codes** box.
3. Near the base of the page, click **Show Merchant-Security Settings**.

   Note: If this link does not display, merchant-security is not enabled for your CASHNet instance.

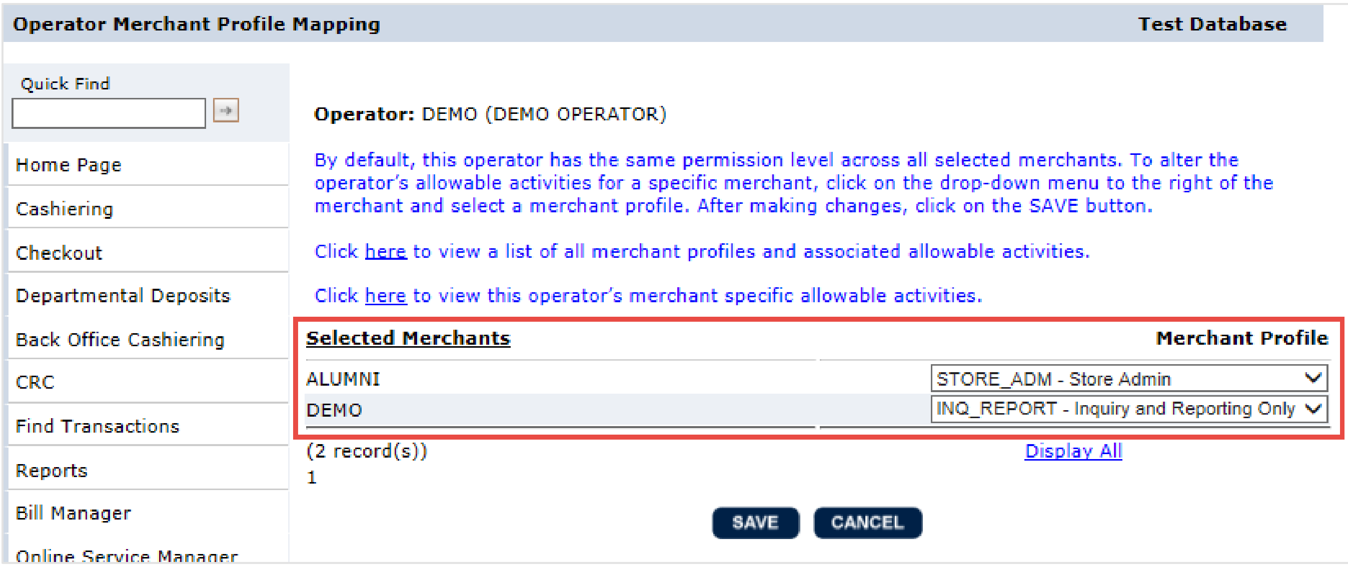
   Figure 47: Show Merchant-Security Settings

   The *Operator Merchant Profile Mapping* page loads.

4. Use the **Merchant Profile** dropdown menus to set your merchant profiles for specific stores.

Figure 48: Merchant Profiles for Different Stores



Appendix B Operator Permissions

This table below lists the CASHNet permissions—“allowable activities”—that are typically associated with eMarket operators. You may want to modify these allowable activity settings for your eMarket Administrator and Store Owner operators according to the store setup tasks they should be permitted to perform.

For details on how to modify operator permissions, see Section 2.2.4 on page 10.

Note: Keep in mind that the list of operator allowable activities below is not exhaustive. For the complete list, refer to the *System Setup User Manual*.

Table 22: List of eMarket-Related Allowable Activities

ALLOWABLE ACTIVITY	WHAT IT CONTROLS ACCESS TO:
BATCH & TRANSACTION MAINTENANCE	
Authorize Voids/Reversals	Ability to approve voids/reversals (typically within a department).
Voice/Reverse Transactions	Allows the operator to reverse transactions.
Authorize Voids/Reversals	Ability to authorize voids and reversals for other operators.
Void Without Being in a Batch	Ability to refund transactions without first opening a batch. Generally used to save time.
Process Dishonored Items/Refunds	Ability to issue refunds or dishonor ACH transactions.
INQUIRY & REPORTING	
Perform Inquiries	Ability to search for transactions through Find Transactions. This can be set to **Within Department Only** or **Selected Merchants Only** if you prefer the operator to only see their own eMarket store information. This permission does not control reporting permissions.
Run Transaction Related Reports	Ability to access Transactions Reports. This can be set to **Within Department Only** or **Selected Merchants Only** if you prefer the operator to only see their own eMarket store information.
Run Departmental Deposit Reports	Ability to access Departmental Deposit Reports. This permission is not usually required for eMarket users and can often be set to **No**.
Run Auto Payment Reports	Ability to access Auto Payment Reports. This permission is only required if the eMarket supports automatic payments, which is common with donation store types.
Run Customer, eBill, eRefund, IPP	Ability to access the respective types of reports.

ALLOWABLE ACTIVITY	WHAT IT CONTROLS ACCESS TO:
Reports	These reports may or may not be needed depending on the overall role of the eMarket operator. If the operator is not going to be administering ePayment, these permissions can likely be set to **No**.
Allow Report Group	Ability to set up automatic reports. This is set to **No** by default.
CASHIERING	
Perform Cashiering	Ability to perform Cashiering tasks. Many institutions prefer not to allow eMarket operators to perform cashiering tasks. However, keep in mind that removing this can create problems for reversing, refunding, or dishonoring transactions.
EPAYMENT & EMARKET	
Process Assisted Payments	Ability to process assisted payments for stores. By default, this is set to **Not Allowed** for eMarket operators. You can change this so that the group or operator may process assisted payments for **All Stores** or for selected stores only (**Define at Merchant Level**).
Create stores	Ability to create new eMarket stores by accessing the **Create store** button and almost everything on the *Create store* page. By default, this is set to **No**, meaning eMarket operators are not allowed to create or modify the store's Initial Configuration settings (see Section 3 on page 20). Instead, a CASHNet Administrator must perform those tasks. However, you may change this to **Yes** if you want your eMarket operators to be able to create and modify the store's Initial Configuration settings. Keep in mind that the Initial Configuration settings are rarely modified after the initial eMarket setup so this is often not necessary and can lead to unforeseen problems if the wrong settings are used.
Access stores	Ability to access stores only select stores or all stores. By default, eMarket operators can access any eMarket store (**All Stores**). Some institutions prefer to restrict this setting to **Selected Merchants Only** and then select specific merchants that the Administrator can access.
Store layout	Allows access to the LAYOUT tab in store setup. Typically, this is set to **Yes** for all eMarket operators but can be restricted if necessary.
Store site	Allows access to the SITE tab in store setup. Typically, this is set to **Yes** for all eMarket operators but can be

ALLOWABLE ACTIVITY	WHAT IT CONTROLS ACCESS TO:
	restricted if necessary.
Store notifications	Allows access to the NOTIFICATIONS tab in store setup. Typically, this is set to **Yes** for all eMarket operators but can be restricted if necessary.
Store items	Allows access to everything in the ITEMS tab of store setup except. In addition, this permission determines whether users can publish the store. Typically, this is set to **Yes** for all eMarket operators but can be restricted if necessary.
Store discounts	The **Create discount** button. Operators without permission can view but not create or modify discounts.
Fulfill Orders	Ability to fulfill orders for stores. By default, this is set to **No** for eMarket operators. You can change this so that the group or operator may fulfill orders for **All Stores** or for selected stores only (**Define at Merchant Level**).
MYPAYMENTPLAN	
IPP Customer Summary	Ability to access IPP Customer Summary. If the eMarket operator does administer or need access to ePayment, this permission can be set to **No**.
AUTO PAYMENTS	
Allow Auto Payment Edit	Ability to edit automatic payments. If the eMarket operator does administer or need access to ePayment, this permission can be set to **No**.

Appendix C Additional Resources

Glossary

The table below defines terms relevant to this document's content.

Table 23: Document Glossary

TERM	DEFINITION
Item Code	CASHNet identifier for a specific item available for purchase.
Allowable Activity	CASHNet term for operator permission, which can be set at the group or user level.
Operator	User with permissions to access the CASHNet Administration site.
Payment Code	CASHNet identifier for a specific payment type or method.
Information Field	A field used to collect additional information from the payer whether at the transaction or item level.

Referenced Documents

This document refers to the following documents.

Table 24: Referenced Documents

TITLE	AUTHOR	URL / FILE LOCATION
ePayment & eMarket User Manual	CASHNet	Support Library > Modules and Services > ePayment & eMarket
System Setup User Manual	CASHNet	Support Library > Modules and Services > System Administration
eMarket Checkout & Gateway Payment Integration Guide	CASHNet	Support Library > Modules and Services > ePayment & eMarket