TRANSACT

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eMarket Store Setup

User Guide

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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.

Contents

1 About This Document

This *eMarket Store Setup Manual* describes the process for configuring eMarket stores.

1.1 Scope

This document focus primarily on the instructions for configuring eMarket storefront and checkout store types.

For information about eMarket gateway stores and additional information on eMarket, refer to the *eMarket & ePayment User Manual*.

For detailed reference information and configuration instructions for your Cashnet database, refer to the *System Setup User Manual*.

1.2 Audience

This document is intended for use by campus staff who will configure, maintain, and use eMarket.

1.3 Glossary

The table below defines terms, acronyms, and initialisms relevant to this document's content.

Table 1. Document Glossary

Term	Definition
Item Code	Cashnet identifier for a specific item available for purchase.
Note Code	Cashnet term for holds, i.e., derogatory records which can be applied to a customer's account and display alerts or prevent certain user actions.
Operator ID	Cashnet term for login username.
Payment Code	Cashnet identifier for a specific payment type or method.

1.4 Referenced Documents

This document refers to and draws information from external documents. The table below lists meta-information associated with these documents.

Tip: To access the Support Library, click the Support Library link in Cashnet.

Table 2. Referenced Documents

Title	Author	File Location
eMarket & ePayment User Manual	Transact	Support Library > Modules and Services > ePayment and eMarket
eMarket Payment Integration	Transact	Support Library > Modules and Services > ePayment and eMarket
System Setup User Manual	Transact	Support Library > Modules and Services > System Administration

2 eMarket Types

Before setting up a new eMarket, you should have an idea of its purpose and how it will behave. In broad terms, you need to determine if your store will be a **Storefront** or a **Checkout** site.

2.1 Storefront

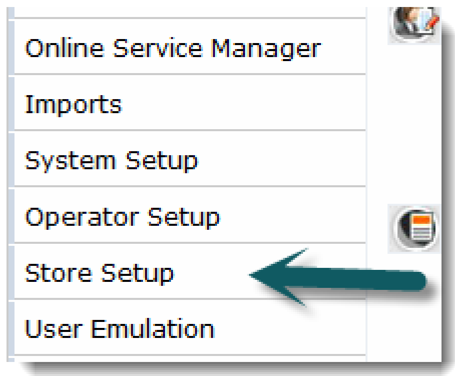
A Storefront is considered a complete eMarket, similar to a brick and mortar store. The Entrance page allows users to select items for purchase and then check out, all within the same interface. The eMarket Storefront checkout process is as follows:

1. Users are sent to Cashnet's store entrance, catalog, or login page.
2. Through the Cashnet store, they log in or select a set of items.
3. Users select a payment method (if applicable), enter payment information, and submit their payment.
4. The Storefront provides them a receipt.

3 Store Setup

Now that you've completed the framework for the eMarket, you can set up the store interface itself. The back-end framework rarely changes so it's typically not necessary to modify anything in the Initial Steps once you've reached this point. Store Setup, in contrast, may change often. This section will offer some guidance on how to make these changes and will cover the most common scenarios. For a more extensive list of Store Setup options, refer to the *eMarket and ePayment User Manual*.

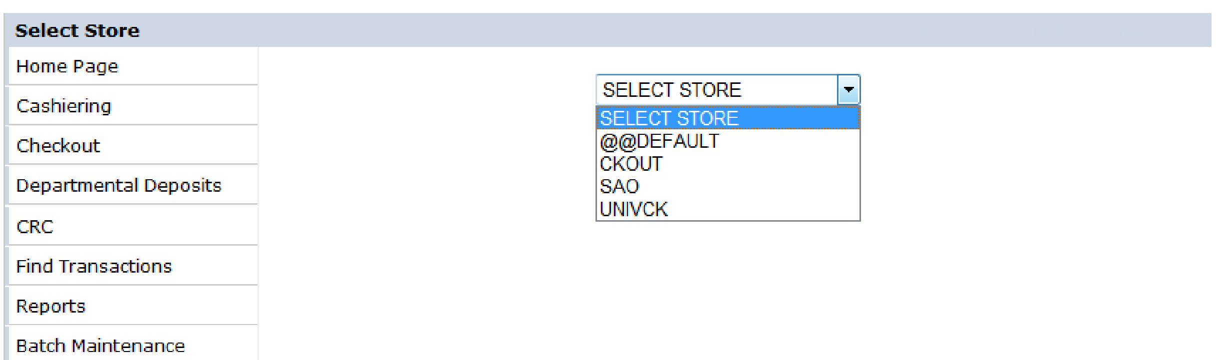
Figure 20. Store Setup Link



3.1 Store Setup Navigation

To access Store Setup, click Store Setup in the left-hand menu. In the middle of the browser window, you will see a drop down box where you can select a store to configure. One you select it, the left-hand menu changes to a list of pages that will guide you through Store Setup.

Figure 21. Store Selector



Note: You will notice a "store" populated in this drop down list called @@DEFAULT. The purpose of this store is to set default values for your eMarkets. This is particularly useful for administrators who want to pre-set payment options, colors, logos, or even custom messages on every eMarket they create. At the bottom of many pages in the @@DEFAULT store, you will see two additional options—Check to make this screen non-editable and Check to apply these settings to all other merchants. These will either lock down these changes or copy changes to all of your other stores, making setup easier later on. Note that you cannot set default categories, items, or discounts through @@DEFAULT.

At the bottom of each Store Setup page, you'll typically see several buttons (as many as 6), which can help you navigate the setup pages. These buttons are as follows:

- Save: Saves your progress on the current page.
- Preview: Opens up a new window to preview your progress (see Version Controls and Previews for more information).
- Restore Defaults: This will restore the fields on your current page to the values in the @@DEFAULT store.
- Help: A quick help feature that briefly describes the fields on most pages of store setup.
- Back: Moves back one page (without saving).
- Continue: Saves the current page and continues onto the next.

Figure 22. Store Setup Buttons

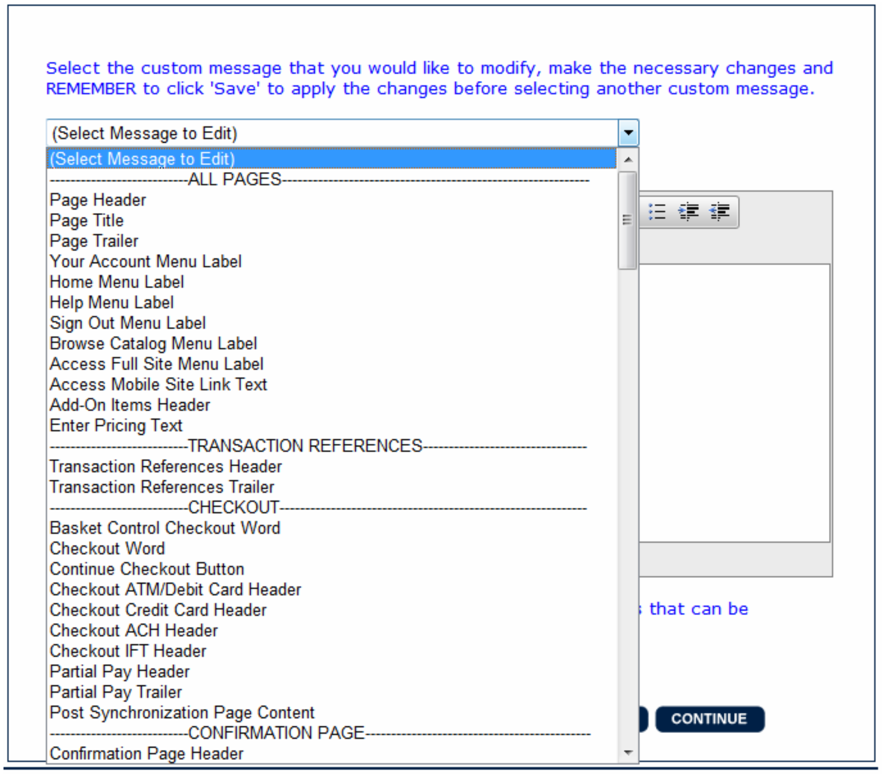
Note: Be sure not to underestimate the usefulness of the Help page! This page is particularly helpful when setting custom messages. It has screenshots that list where the most popular custom messages that reside on the screen and is immensely useful when setting up your store.

3.2 Custom Messages

Custom messages are text fields throughout the eMarket that can be modified (for example, page headers and footers, receipt text, etc). Some fields apply only to Storefronts, but many are shared between Storefronts and Checkout sites. Nevertheless, the list of items presented should be accurate for the type of store you're implementing. Just don't be surprised if you see that the list for a Storefront or ePayment site is far larger than the Checkout site.

Although the list of fields is too large to go over in detail in this document, there are several sections that you may find particularly useful. And remember, many of these fields are shown in screenshots when clicking Help within store setup.

Figure 30. Custom Messages



Tip: Section 9.7.1 of the ePayment and eMarket Manual contains a list of all the custom messages, their default text, and which type of eMarket they apply to. Section 9.7.2 also contains useful information on adding custom Help Center menu items

3.2.1 All Pages

This section contains fields that are present on all pages. If you would like to change the labels on the menu bar or add a trailer or header, use this section to do so.

3.2.2 Checkout

The checkout page is where students enter their banking information. Sometimes the term checkout is not preferred, and it can be changed globally in this set of messages.

3.2.3 Confirmation Page

The confirmation page is displayed after the student has entered their payment information but before payment is collected. Many institutions prefer to add an additional message in the confirmation page header.

3.2.4 Receipts

In the Receipts page, you can make modifications to tailor your receipts to your needs. The following custom fields can be added:

3.2.4.1 Before the item listing (Receipt First Section).

3.2.4.2 Between the items and payments (Receipt Second Section).

3.2.4.3 After the payments (Receipt

Third Section). Additionally, there are

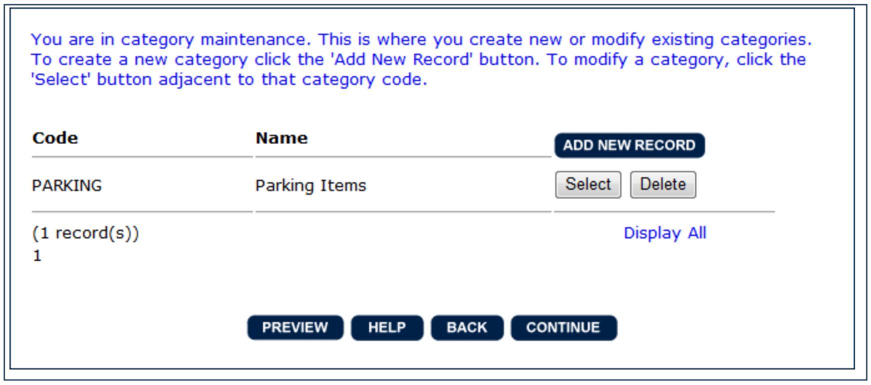
also fields specific to the receipt email.

Tip: The message in the Receipt section called "Sign Out Instructions" can be useful for schools that require students to click the Sign Out button so that a redirect can take place (configured in Store Settings). Language such as "Your payment is not complete until you click continue" may be helpful. You may also want to change the receipt button text if this is the case.

3.3 Categories & Items

Although Categories are nestable, items can only belong to one category at a time. You can set up Item Codes through this dialog or through System Setup, but eMarket administrators typically do not have access to System Setup. The Item Code Creation page is also where forms can be built for item purchase (Storefront or Checkout sites).

Figure 31. Category Maintenance



3.3.1 Categories

If your store uses categories, you can add new options by clicking Add New Record on the categories page.

3.3.1.1 Set the Category Code to something relevant for your category (for example, “PARKING”).

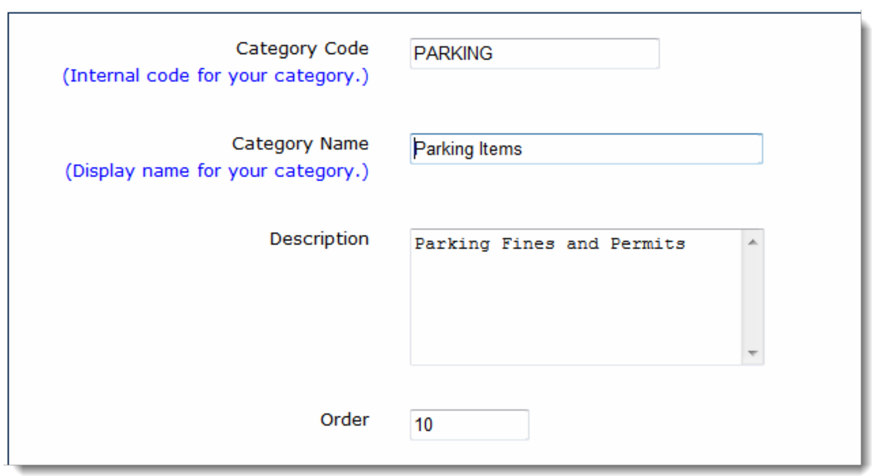
3.3.1.2 The Category Name is displayed on the store page.

3.3.1.3 Description is also displayed to users but is optional.

3.3.1.4 Order determines the order in which categories will be displayed on the page.

3.3.1.4.1 It’s a good idea to leave some space between your category order values. For example, instead of setting category values as 1, 2, 3, 4, and 5, you can use 10, 20, 30, 40, and 50. This will allow you to insert categories between others in the future without changing the order of all of them.

Figure 32. Example Category



The remaining boxes may be blank, but items can be assigned to categories from the Item Code setup as well. Alternatively, you can create your items, and then assign them to categories by coming back to the Categories page and selecting the category you want to edit.

You can also specify a Parent category if you wish. For example, under a PARKING category, you may have FINES and PERMITS.

Note: Categories will not show up in the store unless they have at least one item assigned to them.

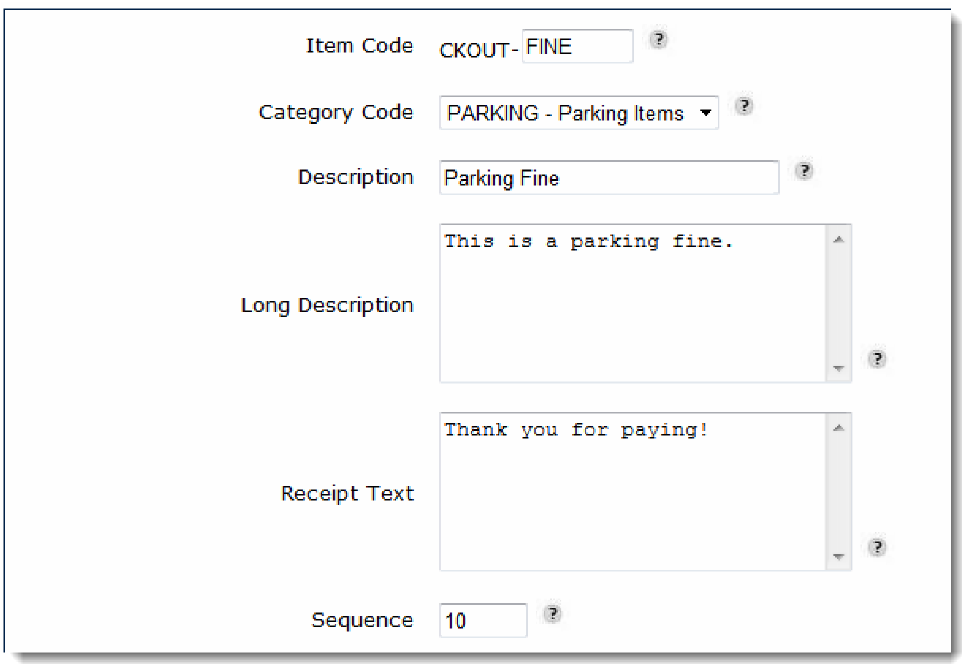
3.3.2 Item Codes

Item Codes represent the purchasable items that you want to display in your store. These can be physical goods, charges related to student services (permits, transcripts, etc.), or even donations and event tickets. Item Code setup is fairly complex and is described in greater detail in the System Setup and ePayment and eMarket Manuals, but here is some relevant Item Code setup information:

3.3.2.1 Items allow you to put different descriptions on the catalog as opposed to the receipt. Long Description displays when the item is selected but never displays on the receipt. Receipt Description is the opposite.

3.3.2.2 Sequence works similar to Order in Categories. You'll want to leave some room between sequence numbers to allow for expansion. (This doesn't matter for Checkouts as there is no catalog to worry about.) If sequence numbers aren't specified, they'll display in alphabetical order by Item Code (Storefront only).

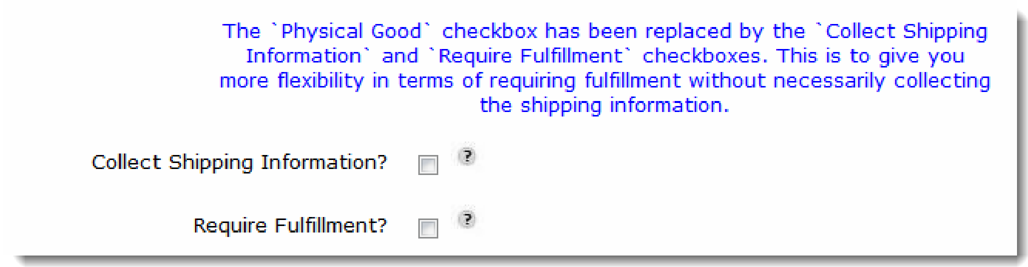
Figure 33. Example Item Code



3.3.2.3 Fulfillment can be used and is required for physical goods. Fulfillment means that a transaction must be approved by an administrator before the payment is collected, such as when an item needs to be verified as in stock or shipping must be arranged before payment.

3.3.2.3.1 Fulfillment can also be used outside of shipping physical goods. For example, a continuing education eMarket may not want to charge students until a class fills up enough to be held. This prevents unnecessary refunds.

Figure 34. Physical Goods Details



3.3.2.4 You can specify an image for an item for any standard graphic format (Storefront only).

3.3.2.5 If you want to collect additional information when an item is selected (for example, demographic information, dinner or seat selections, etc.), you can do so after clicking Continue, as long as the "Do you want to collect additional information?" box has been checked.

3.3.2.6 You may select add-on items with the appropriate checkbox. Add-ons are other items you have created in your store that complement the item being purchased. For example, buying a team T-shirt when purchasing game tickets (Storefront only).

3.3.2.7 Alternatively, you can specify that the item is only going to be used as an add-on. This might be useful if items are offered at a special price to the attendees of an event or similar situations.

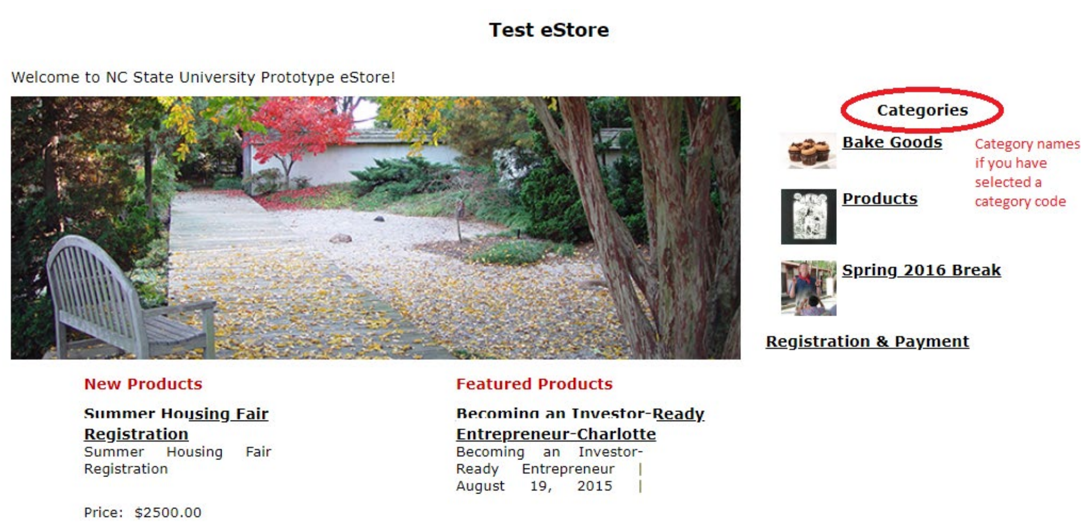
Figure 35. Item Additional Information

3.3.3 When creating a new event or item for sale there are a few required fields

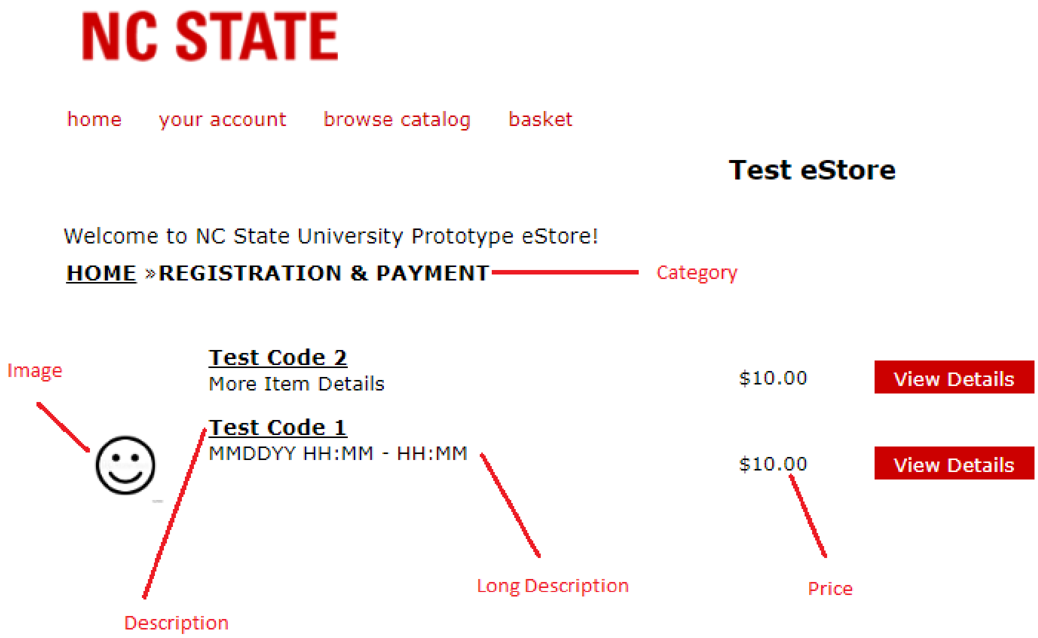
Field	Description
Item Code (optional, we can create this for you)	This will be your back-end item identifier; it will appear in your URL
Category Code (optional)	The category of your estore you would like the item to appear under
Description (required)	This will appear on the top of your item page and on your estore to identify your item
Long Description (optional)	This is your subheading under your Description on both the estore page and your item page. This can be used for date/time of the event or any other relevant information you wish to display.
Receipt Text (optional)	What you would like displayed on the customers receipt Ie. "Thank You for your Purchase of …"
Sequence (optional)	Where the code appears on your estore page or category

Collect Shipping Information (optional for products)	Additional screen will appear to provide shipping information for products
Collect Sales Tax (required for products)	Add sales tax for products
Image (optional)	Image on item page and miniature image on estore page JPEG, GIF file up to 1MB 500x500pxl
Price(required if not specified with options later)	Item/event price
Can user specify quantity (optional)	Yes/No- if you want user to be able to select quantity
Min Allowable Quantity (required if user can specify quantity)	What is the lowest amount the user can purchase; usually 1
Max Allowable Quantity (required if user can specify quantity)	What is the highest amount the user can purchase
Name for 1 unit of this item (required if user can specify quantity)	Singular item noun ie. “item”
Name for 2 or more units of this item (required if user can specify quantity)	Plural item noun ie. “items”
Available Inventory (optional)	What is the max amount of items/event seats available
Do you want to collect additional information when this item is purchased? (Required)	Yes/No- Do you want to collect additional information/ options?

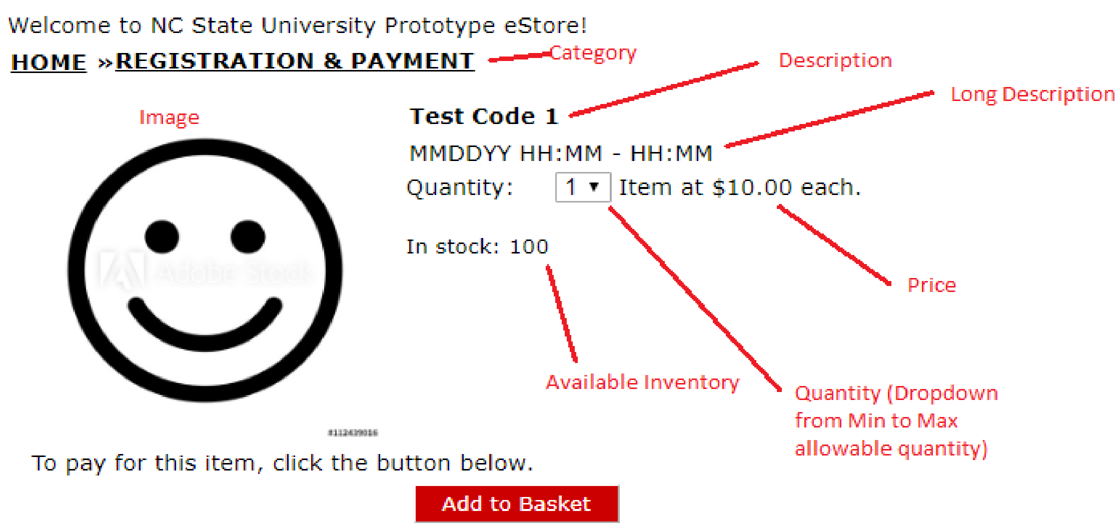
eStore Page



Category Page



Item Page

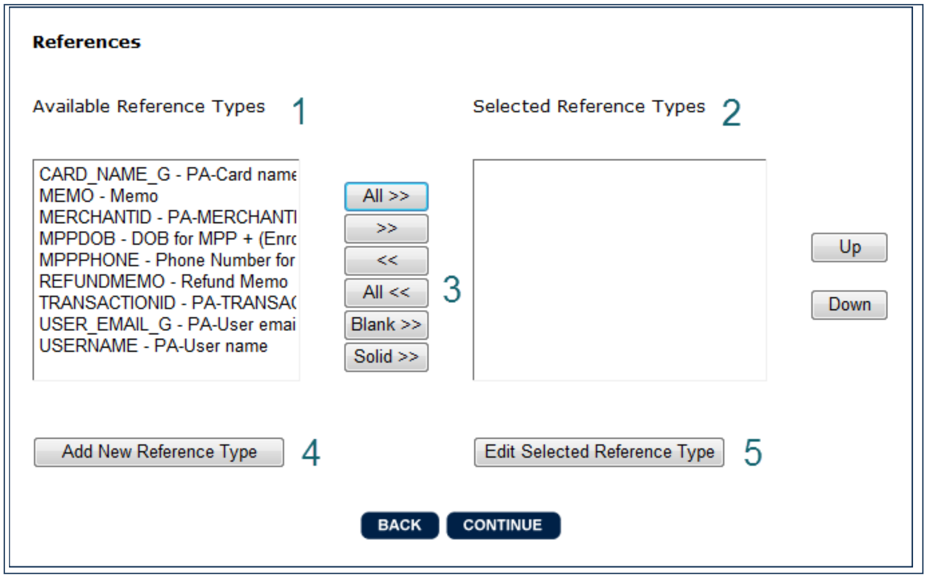


3.4 References

For detailed information on References, refer to the System Setup Manual. References can be created directly from Store Setup as well. To access the reference page through store setup, create an Item Code or edit an item that already contains references. Make sure the box is checked next to “Do you want to collect additional information…” near the bottom (see Figure 35 above).

Once you click Continue, a page will load, enabling you to select your references:

Figure 36. References Page



3.4.1.1 Available Reference Types lists any references already in the system.

3.4.1.2 Selected Reference Types shows all references currently listed on the item you're setting up in the order they will appear.

3.4.1.3 The center set of buttons move references back and forth. The "All >>" and "All <<" buttons will move all references to one side or the other. ">>" and "<<" will move only selected references. "Blank >>" will insert a blank line between references, and "Solid <<" will insert a solid line.

Tip: You can select multiple references by holding down Ctrl on your keyboard and clicking multiple references. You can also select all references between two of them by clicking on one reference, then holding down Shift and clicking another.

3.4.1.4 Add New Reference Type will take you to the reference creation page. (For detailed information, refer to the *System Setup User Manual*.)

Tip: Creating a reference with "_G" will cause the reference to automatically populate on the checkout screen. This is a time-saving feature that many users will appreciate. For example, if you collect a user's email address when selecting an item, a reference called "EMAIL_G" will pre-populate the Email Address field for them during checkout. Valid references of this type that can be created are: NAME_G, ADDR_G, CITY_G, STATE_G, COUNTRY_G, ZIP_G, and EMAIL_G. You can also add a prefix to these references, such as USER_NAME_G or SCHOOL_EMAIL_G. Be sure to only use one reference of the same type, however. For example, don't create an item with both NAME_G and USER_NAME_G, as this may have unpredictable results when determining which field will pre-populate.

3.4.1.5 Edit Selected Reference Type allows you to edit a reference that you've already selected for use in your eMarket.

3.4.2 Creating Reference Types

If you decide to collect or display additional information on your item page here are your options:

Text	Text Box
CheckBox	Select one option
Horizontal/Vertical Radio Buttons	Select one of multiple options
Drop Down	Select one of multiple options
Explanatory Text	Give details or information on event/item

Options for Text	
Prompt (Required)	What is the prompt for the textbox
Required	Yes/No- Is this a required field
Update Item Amount	Change/Add to price
Show on receipt	Show field on customer receipt
Max Field Size	How many characters would you like the customer to be able to enter

Options for CheckBox	
Prompt (Required)	What is the prompt for the checkbox
Required	Yes/No- Is this a required field
Show on receipt	Show field on customer receipt
Checked Value (Required)	If the box is checked what is the value associated with it
Unchecked Value (Required)	If the box is unchecked what is the value associated with it
Checkbox Default	Default checked or unchecked

Options for Radio Buttons	
Prompt (Required)	What is the prompt for the checkbox
Required	Yes/No- Is this a required field
Show on receipt	Show field on customer receipt
Update Item Amount	Change/Add to price
For Each Button	
Value	What is the option description
Price	Price if you want the option to update item price

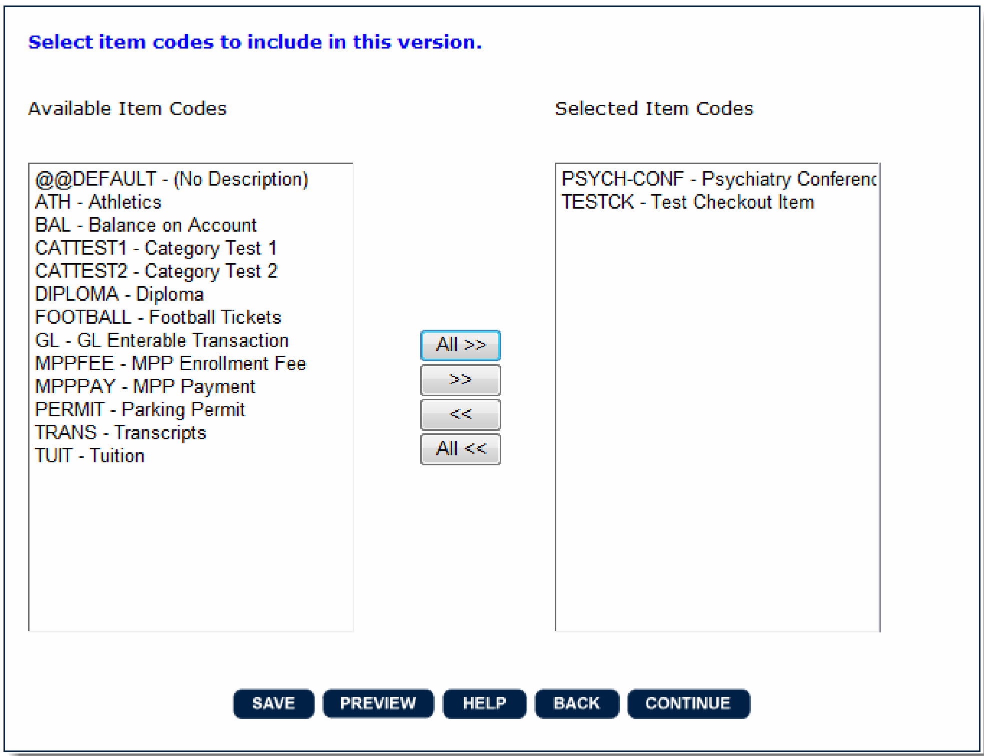
Options for Dropdown	
Prompt (Required)	What is the prompt for the dropdown
Required	Yes/No- Is this a required field
Show on receipt	Show field on customer receipt
Update Item Amount	Change/Add to price
For Each option	
Value	What is the option description
Price	Price if you want the option to update item price

Options for Explanatory Text	
Explanatory Text	What information would you like to display

3.4.3 Select Items

The Select Items page allows you to move items from the available items list to the list of items that will appear in the actual store. Items on the right will display in the store, whereas items on the left can still be added to the store. Remember, changes made on this page do not take effect until the store has been implemented.

Figure 37. Select Items



3.4.4 View Store Outline

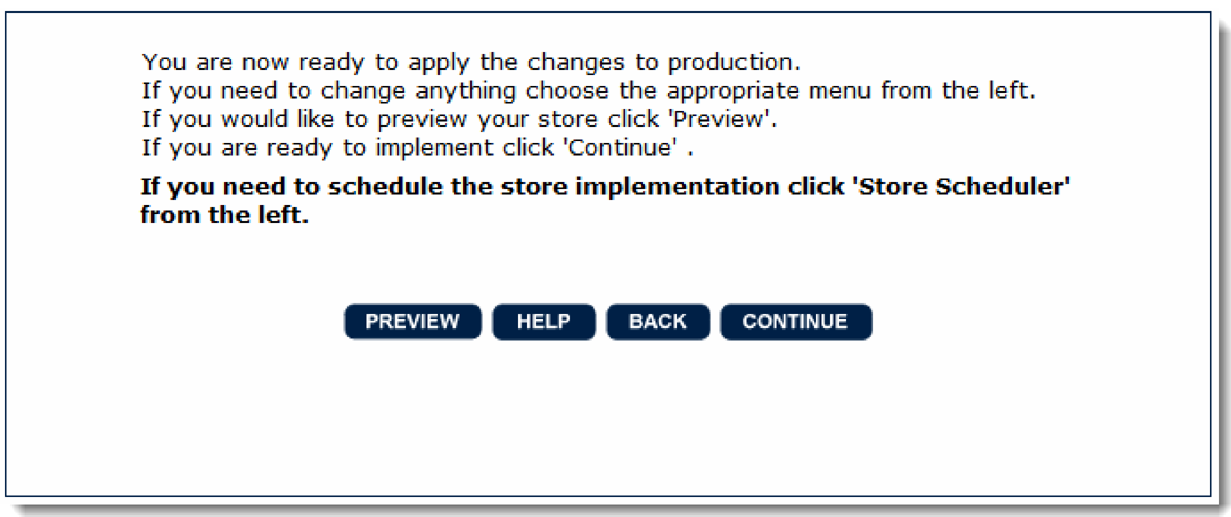
The Store Outline page displays the hierarchy of your catalogs and items. It's primarily useful if you have many catalogs and need a quick overview of how everything fits together in your catalog.

Figure 38. Store Outline

3.5 Implement Store

None of the changes to the selected Item Codes, Custom Messages, or other areas of the site will take effect until you have implemented the store. This is a form of version control that allows administrators to set several different changes and put them to go into effect only when desired. Nonetheless, modifications to individual items (price changes, form changes, etc.) are immediate.

Figure 39. Implement Store Notice

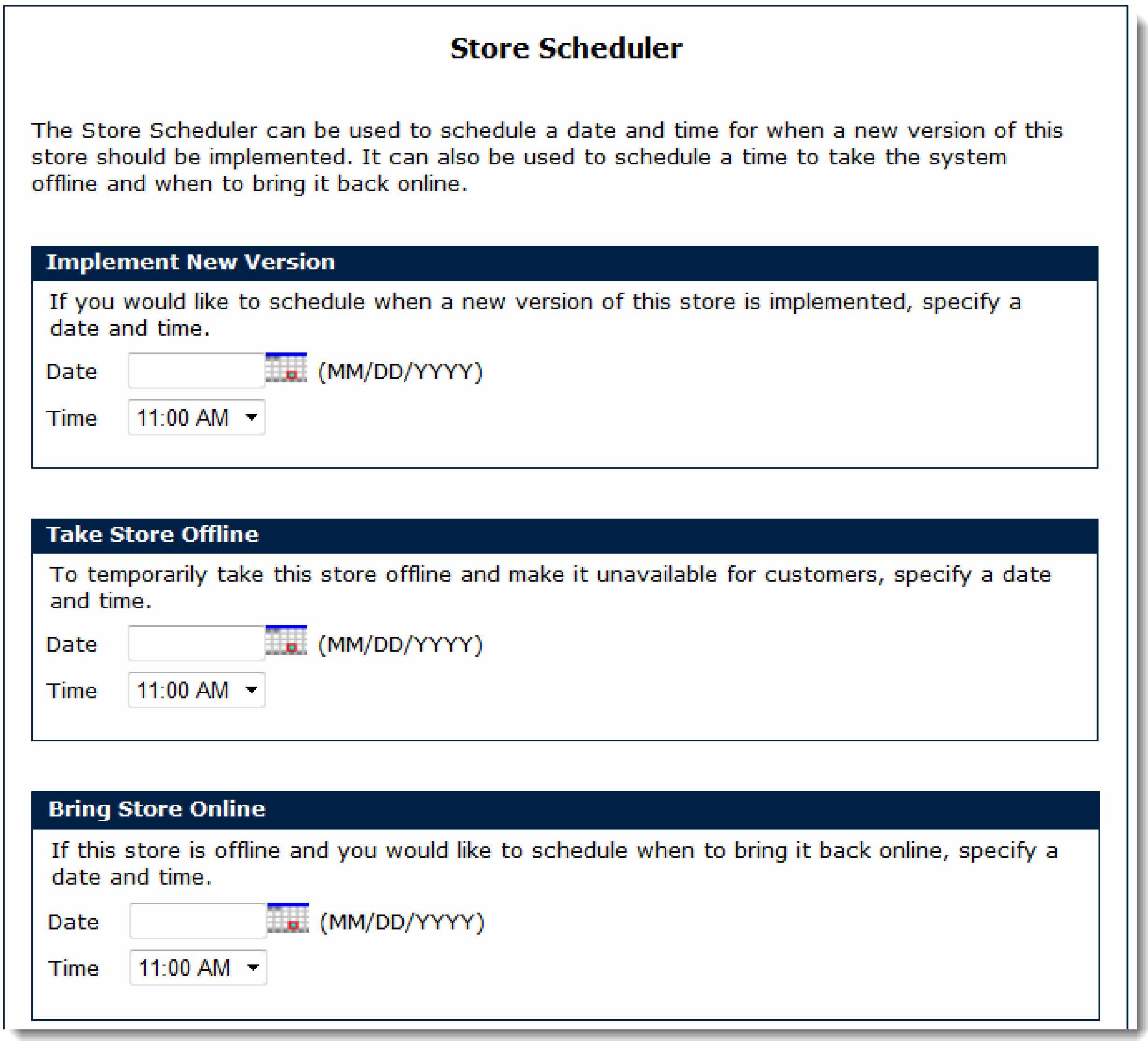


Tip: If your store setup contains any errors, they will usually show up when you attempt to it. For example, if you have chosen to allow payments by ACH but your Location does not allow that, or if you've chosen a payment method that hasn't been set in Merchant setup, red error messages will appear on this page and you will not be able to continue. Don't worry – your progress to this point has been saved.

3.5.1 Store Scheduler

A store can be taken offline, put online, or implemented at any time. The store scheduler page allows you to schedule these parameters. However, you can only enter one set of dates at a time and must set them again after any changes have taken effect. For example, if you set the store to come online at midnight on December 1 of this year, then go offline on December 31 and want the store to do it again next year, you will have to manually reset the date after December 31.

Figure 40. Store Scheduler



Special Note: Items and References in a Checkout

Items and References can be added to a Checkout as well as a Storefront. More coordination must occur because the checkout request to the Cashnet system must contain exact values for each Item Code and Reference that is to be populated in the system. For example, if I supply an item called EVENT with three references – NAME_G, LOCATION, and DINNER – all of these have to be created in the system, and the item must be added to the store before it can be used.

Special Note: Previewing a Checkout

Checkout sites expect input from another site before they can be directly viewed since the first page a user will see is the payment selection page. As a result, previewing a checkout site takes an additional step. When the Preview button is clicked, a special page is displayed with a set of parameters that can be passed into the checkout site. At a minimum, the item and amount must be populated. Additional information may need to be supplied for references, descriptions, or names as well. Up to 3 items with 3 references each may be supplied through the Preview screen. Once these fields have been populated, click Submit to Checkout to advance to the Cashnet screens.

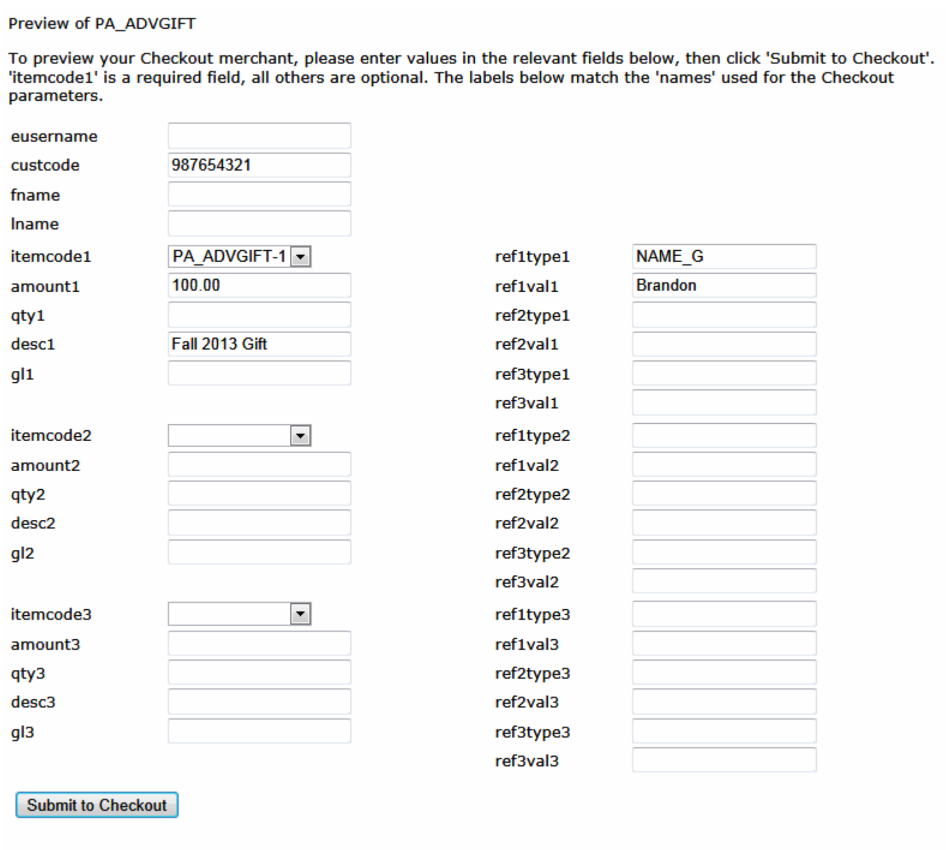


Figure 41. Store Preview—Checkout