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### **Request for a new TouchNet Marketplace uStore/uPay**

TouchNet Marketplace is a credit card payment processor portal which offers a uStore or uPay site.

uStore: Is a shopping cart application that allows customers to purchase items and pay for products online.

uPay Site: Is a payment application processor that is interfaced with a third-party business application.

This guide provides steps for TouchNet Marketplace uStore/uPay Request to be completed directly in Workday. The expected setup time takes between 4-6 weeks.

The process will route in Workday for approval and result in the setup of the requested uStore or uPay site. Notification of the uStore/uPay site setup will be sent to the Initiator for review before the Request is closed.

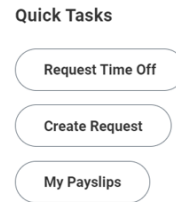
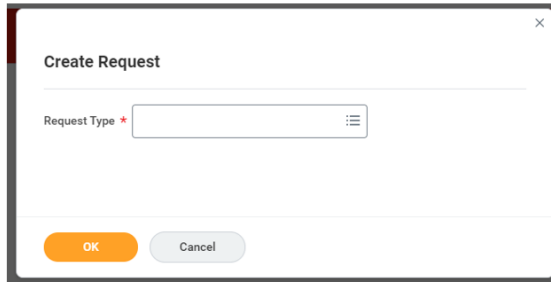
The TouchNet uPay/uStore Request requires the existence of revenue budget within the cost center. If no revenue budget is set up in the cost center, contact the Budget Office to set up the revenue budget.

Do not start the TouchNet UStore/uPay Request until revenue budget is available in the Cost Center.

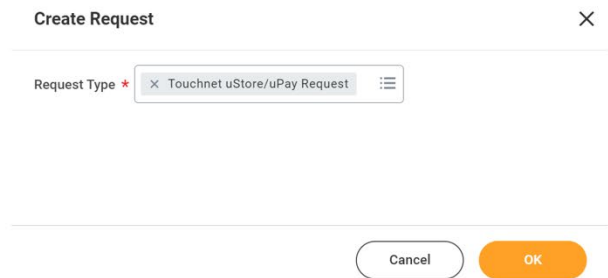
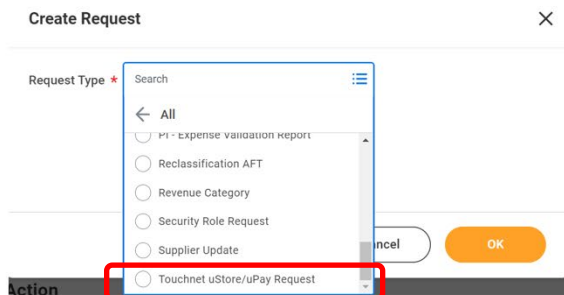
The Security Groups allowed to initiate this TouchNet Marketplace uStore/uPay Request process are Cost Center Finance Specialist, Cost Center Manager, Division Manager and Grant Managers.

# Create Request

- 1) In the *Global Search* box, enter **Create Request**, or if you have the worklet added as Quick tasks on your desktop, click on **Create Requests**.



- 2) Click **All** in the Request type field and select the radio button next to TouchNet uStore/uPay Request:



- 3) Click OK

# Complete the Questionnaire

- 1) All questions should be answered, if the question is not applicable please enter 'N/A'.
  - There is an opportunity to enter a description of this request in the first text box of the questionnaire. This is not required but the more information provided the smoother the process.

Describe the Request

- Select your Request: If you select uPay you will be requested to provide the TouchNet Ready Partner (third-party vendor) name.

Select your request : uStore or uPay

uStore is intended for departments who wish to accept credit card payments for products/services/events and require basic collection of information.

uPay is used by departments who require a TouchNet Ready Partner (third party vendors who are compatible with Marketplace) to collect more in-depth and complex information.

With uPay, information is collected by the TouchNet Ready Partner system and Marketplace acts as only the payment gateway.

(Required)

uStore

uPay

- If this is a uStore request describe who your customers are, for example are they faculty, staff, general public, students. If this is a uPay request enter 'N/A' or not applicable.

If this is a uStore Request who are your primary customers

(Required)

- Provide purpose for requesting a uStore/uPay site.

Provide purpose of requesting uStore/uPay.

(Required)

- Provide the associated Cost Center. Enter the name and the cost center ID.

Provide associated Cost Center Name and ID.

(Required)

- Provide Revenue Category Name and ID.

Provide Revenue Category Name and ID.

(Required)

- Provide ledger account associated with Revenue Category.

Provide ledger account associated with Revenue Category.  
(Required)

- Provide Name for uStore or uPay site.

Provide Name for uStore or uPay.  
(Required)

- Expected go-live date. Enter a date taking into consideration the process time for this Request to be approved and to be set up in TouchNet.

Expected go live date.

Note: uStore/uPay set up time is between 4-6 weeks.  
(Required)

- Provide name and email address of site manager or contact person (uStore/uPay).

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Provide name and email address of site Manager or Contact person (uStore/uPay).  
(Required)

- Provide name and email address of users who need access for fund processing and reporting (uStore/uPay).

Provide name and email address of users who need access for fund processing and reporting (uStore/uPay).

(Required)

- Select product type for uStore. If selecting Other more information regarding the product type is required.

Select product type for uStore.

- Event Registration
- Training
- Other

Provide more information for the Other product type:  
(Required)

- There are two uploads for uStore requests. One is for product lists with prices and the other is for any fliers, brochures, registration forms that contain relevant information for the uStore site.

Provide product list with price for uStore .

Drop files here

or

Select files

Please attach any fliers, brochures, registrations form that contain relevant information for uStore.

Drop files here

or

Select files

- Indicate if there are any quantity restrictions for your product:

Are there purchase limits for your product? (Quantity restrictions)  
(Required)

- Yes
- No
- Not Applicable - Request is for uPay

- List your return policy to be published on the uStore site. For uPay enter not applicable.

List your return policy to be published on the site for uStore. For uPay enter not applicable.  
(Required)

- Provide Discount terms if applicable for uStore. For uPay enter not applicable.

Provide Discount terms if applicable for uStore. For uPay enter not applicable.  
(Required)

- Is payment notification required – when a transaction is processed do you require notification? If selecting Yes, an email address is required to be entered for notification.

Select if payment notification is required.

- Yes
- No

Provide email address for notification to be send.  
(Required)

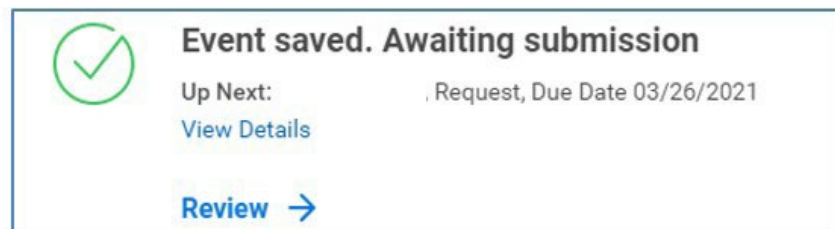
- Provide the message to default on the landing page of the new uStore site. If this request is for uPay enter 'N/A' or not applicable.

Provide the message to default on the landing page/home page (e.g. information of event/service/conference) for uStore.  
(Required)

- 2) Click OK to submit the request or CANCEL to cancel the page. If Cancel indicate if you want to Discard Changes??



- 3) If **Save for Later** is selected, the request will be located in the Inbox where it may be selected and completed at a future date.



## Notifications

- 1) IMPORTANT - CONFIRMATION REQUIRED.

Before the process is completed a notification will be sent to the **Initiator** (Requester) to confirm the uStore or uPay site is correct. The notification reads as follows:

***'Your request for TouchNet uStore or uPay has been setup by the TouchNet Administrator. Please confirm by email to the TouchNet Administrator that the Name and Details on the landing page of TouchNet are as requested.'***

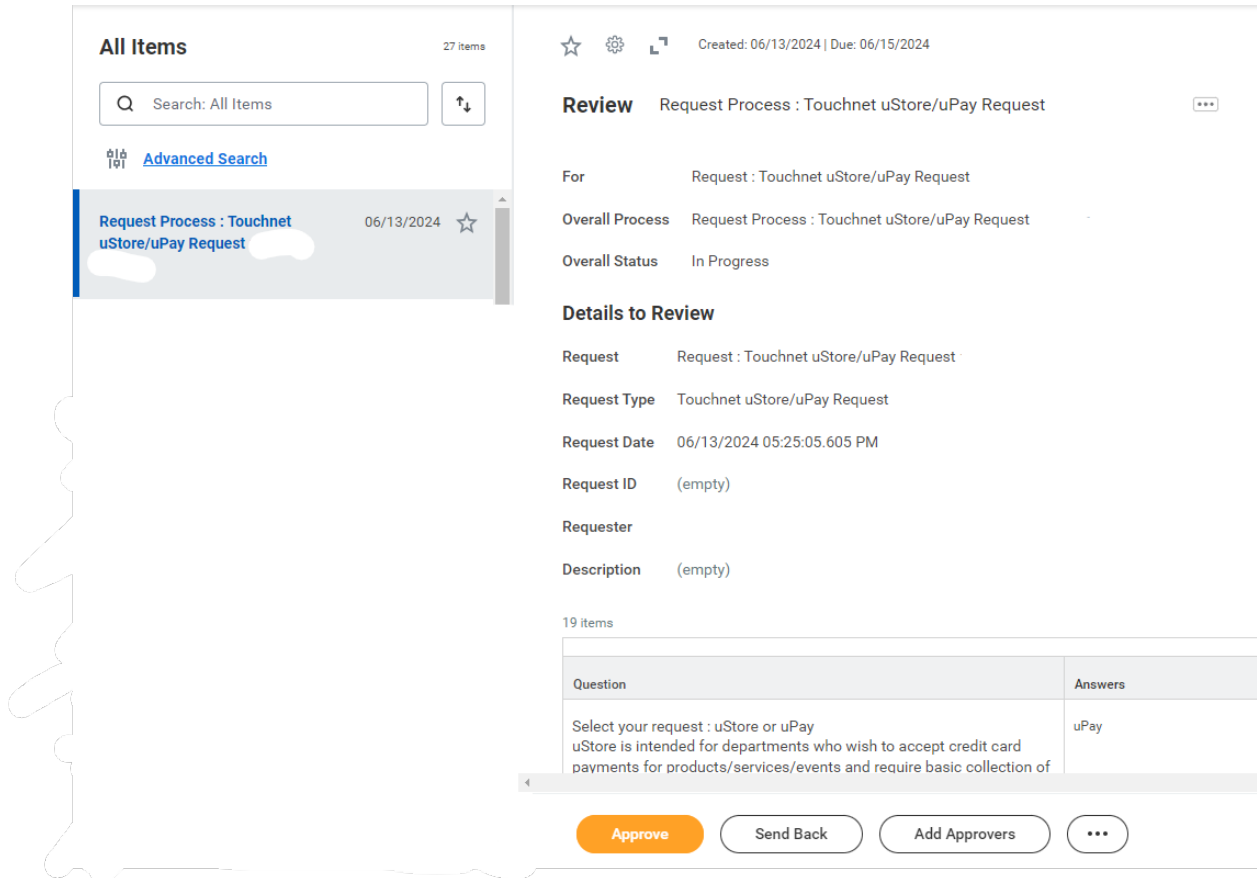
**Email for TouchNet Administrator is [epayments@montclair.edu](mailto:epayments@montclair.edu)**

NOTE: The TouchNet Request process will only continue once the Administrator receives the email confirmation from the Initiator (Requester).

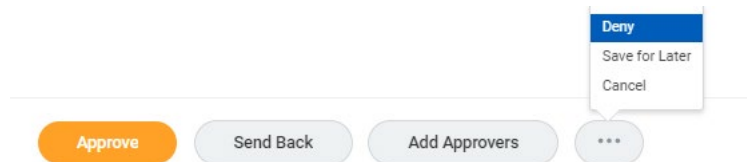
- 2) All groups associated with the Request (including the Initiator) are notified once the TouchNet uStore/uPay Request is completed.

# Approval Workflow

- 1) The TouchNet uStore/uPay Request will be sent to the Approver's Inbox. All requests are required to be approved by the Cost Center Manager and Division Manager as well as central administration approvers, e.g. General Accounting, Budget and Planning and others.



- 2) The Questionnaire is available to be viewed by the Approver and may be Sent Back or additional approval may be added using the Add Approvers button. This will result in the current step being approved before getting the additional approval. Any additional comments may be entered into the Comment box. All comments are retained on the business process for others to view.



- **Approve** to advance the questionnaire to the next step of the process,



- **Send Back** to the Initiator/Approver to revise the questionnaire,

**Send Back**

To \* search

Reason \*

Submit Cancel

- **Add Approvers** to show your approval but will not progress to the next step until additional approval is submitted.

**Add Approvers**

The next step in the process will not happen until the additional approvals are done.

Additional Approvers \* search

Comment

Submit Cancel