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About This Guide

The U.Commerce® Central User Guide is for campus administrators who need to track commerce activity across their campus. U.Commerce Central allows administrators to view system operations, view commerce activity across campus, and access the U.Commerce Central help system.

About PCI Compliance

Setting up TouchNet software in a PCI-compliant data center not hosted by TouchNet requires following the guidelines of the PCI Security Standards Council. For more information be sure to read the “Payment Card Industry (PCI) Data Security Standard” document at https://www.pcisecuritystandards.org/pdfs/pci_dss_summary_of_changes_v1-2.pdf to ensure that you are protecting all sensitive information.

For information regarding TouchNet’s PA-DSS compliant payment applications and how they support your institution’s PCI compliance efforts, refer to the TouchNet PA-DSS Implementation Guide. Individuals responsible for PCI compliance should review this guide. Please visit the TouchNet Client Community to obtain a copy of the PA-DSS Implementation Guide.

To Contact TouchNet Customer Care

For technical assistance or customer support contact TouchNet Customer Care, by calling 1-888-621-4451 between the hours of 7:00 a.m and 7:00 p.m. Central Time, or logging into the TouchNet Client Community at https://clientcommunity.touchnet.com and selecting the Contact Customer Care quick link.

TouchNet Customer Care is available Monday through Friday between 7:00 a.m. and 7:00 p.m. Central Time. Extended support hours are available by agreement with TouchNet.
1.0 Introduction to U.Commerce Central

TouchNet® U.Commerce Central is a centralized location to manage U.Commerce system operations, view commerce activity across campus, and access the U.Commerce Central help system. The vision of unified campus commerce comes to life in U.Commerce Central. It's the "command center" for campus-wide financial management, bringing new accountability, control, and confidence to campus finance. It encompasses all of your TouchNet campus solutions, an Operations Center that gives you instant, high-level information about your business, and a user management system.

It allows you to:

- View all commerce activity for a particular date range.
- Identify and take action on issues requiring attention with minimal effort.
- Access any of your TouchNet administrative applications with a single click.
- Manage users, passwords, and login policies.

U.Commerce Central provides centralized, single sign-on access to the administrative functions of the Operations Centers for all licensed TouchNet commerce applications. This provides a more efficient way of doing business by allowing users to transition between applications while maintaining the state of the previous application.

1.1 U.Commerce Mobile

With U.Commerce Mobile users can use the browser on their cell phones to make payments on student accounts, browse the mobile mail to order merchandise or register for events, and make donations. U.Commerce administrators can also use their cell phones to monitor day-to-day business.

U.Commerce Mobile can be personalized to allow administrators to manage business functions with the Mobile Dashboard, monitor transaction volume for your institution, and receive alerts for actions required in your TouchNet commerce applications.

U.Commerce Mobile offers three mobile applications, mobile Dashboard, mobile Marketplace, and mobile Bill + Payment.

With Mobile Dashboard you can:

- Get a Dashboard view of all payments across campus by date and time.
● Analyze historical data and payment trends by date range.
● Review transaction activity by payment method.
● View a graphical breakdown of payments by source.
● Receive system-wide alerts.

**With Mobile Marketplace you can:**

● Shop campus storefronts while on the go.
● Make payments and access stored payment profiles.
● Register for events or make a mobile gift.
● Make purchases from several campus stores with a single checkout.
● Enroll in continuing education classes.

**With Mobile Bill+Payment you can:**

● View account balances and real-time activity.
● Review financial aid details.
● Make payments using your stored payment profiles.
● View scheduled payments and payment plan installments.
● Receive text alerts regarding new online statements, payment due dates, and refunds available.
2.0 What's New in U.Commerce Central 8.2

U.Commerce Central includes several new features:

- Adds the Cross Border/TransferMate application module realm to the U.Commerce Central Administration. TransferMate will be an option available in the Applications Module realms that can be selected if a school wishes to use the Cross Border/TransferMate payment method. The Cross Border/TransferMate application module must be enabled for the school’s TPG Administrator to set up the Cross Border/TransferMate merchant configuration in the Payment Gateway Operations Center.

- Adds View Bookmark Link to the U.Commerce Central Welcome page. The View Bookmark Link is located in the navigation bar. Users can click the link to create a bookmark to a specific page, making it easier and quicker to locate the page.
3.0 Getting Started

This chapter explains how to log in and out of U.Commerce Central, how to navigate the Welcome page, how to edit your password, and how to access your other TouchNet licensed applications.

Instructions for setting up your Multi-Factor Authentication (MFA) account are also included in this chapter. MFA is an extra layer of protection for your account login credentials and business data. MFA verifies your identity with two different "factors" of authentication when you log in.

Once you have a U.Commerce Central Username and Password, you are ready to log into the U.Commerce Central Operations Center. The screens you see once you log in to U.Commerce Central are dependent on the TouchNet applications your institution has licensed and whether this is your first time logging in to U.Commerce.

**Important!** TouchNet recommends using Google Chrome, Firefox, Safari, or Microsoft Edge when accessing the web-based TouchNet U.Commerce suite of products and services. These browsers are all supported for the current version and one previous version. Users may experience connectivity and performance issues when using Internet Explorer. TouchNet does not recommend using Internet Explorer. Please use one of the recommended browsers instead.

3.1 About Multi-Factor Authentication

Multi-Factor Authentication (MFA) is an extra layer of protection for your account login credentials and business data. MFA strengthens your TouchNet U.Commerce security by adding another verification method during login.

The first time you login to U.Commerce following MFA implementation, you will be prompted to set up an authentication account by entering an email and phone number. This email and phone number will be used to send you a unique verification code that you will enter when logging into U.Commerce.

Once your MFA account is set up, you enter your U.Commerce username and password, select your verification method (email or phone), and you will receive a verification code. Enter the code on the Account Login screen and you’re logged into U.Commerce.
Important Reminders:

- MFA will be conducted only once in a 24-hour period when you log into U.Commerce. Once you’ve logged in and authenticated, you will not be required to re-authenticate as you log in to your other TouchNet applications.
- All U.Commerce users at your institution will need to verify (authenticate) during login using MFA.
- Students and their authorized users (end-users) will NOT be required to authenticate their login credentials using MFA.
- Shared logins are a security risk, do not comply with PCI DSS, and will not work with MFA. Each user will have to associate their personal contact information to their individual U.Commerce user, such as email address and phone number, and only that individual will receive the appropriate two-factor code for logging in.

3.2 Setting Up Your MFA Account

Follow these steps to set up your MFA account.

1. Select your institution’s link to U.Commerce Central. The U.Commerce Account Login appears.

![U.Commerce Account Login screen]

2. Enter your U.Commerce username and password. Your username will contain your institution’s customer number, followed by a period and your username. For example: C123456.jsmith.

3. Click the Sign In button.
Enter username and password

4 The first Multi-Factor Authentication (MFA) screen appears. On the next few screens, you will be prompted to enter an authentication email and phone number to establish your MFA account. Click the Continue button.

MFA Account Login

5 Enter the desired email to receive your MFA verification code and click the Send Verification button.
6 The verification code is sent to your email. Check your email inbox and make note of the applicable verification code.

7 Navigate back to the MFA Account Login screen and enter the verification code in the field provided.

8 Click the Verify code button.
Note: If you did not receive an email in your inbox, please check your spam folder. If you do not receive the verification code email in 20 minutes, you will need to request another verification code be sent to you. To resend a new verification code, click the Send new code button. Once you have received the email with the new code, go back to Step 7.

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

10 Next, you will need to enter a valid phone number that can be used to send a verification code or receive a phone call.

11 Select the applicable country code from the dropdown menu.
12 Enter your phone number.

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

14 Once you have received the verification code on your phone, enter the verification code and click Continue.

The U.Commerce Central Welcome page appears.
From the Welcome screen you can access any of the TouchNet applications that your institution has licensed. Hover over the Applications tab to display the dropdown navigation menu for the TouchNet licensed applications and select the desired application.

**Reminder:** Once you’ve logged in and authenticated, you will not be required to re-authenticate as you log in to your other TouchNet applications, during the same session.

### 3.3 Logging into U.Commerce Central Using MFA

After your MFA account is set up, each time you log in to U.Commerce Central you will authenticate your login credentials by entering a unique verification code that is sent to you using your verification method.

Follow these steps to login.

1. Select your institution’s link to U.Commerce Central, enter your U.Commerce username and password on the Account Login screen, and click Sign In.
2 On the Account Login screen, select the method you would like to use to receive your verification code.

Note: If it has been less than 24 hours since you complete MFA, you will bypass this step.

Note: From this screen you can also update the phone number or email address that you previous entered when establishing your MFA account. (Follow the instructions on the screens.)

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

**OR**

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

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

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

6 The U.Commerce Central Welcome page appears.

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The U.Commerce Central Welcome page

From the Welcome screen you can access any of the TouchNet applications that your institution has licensed. Hover over the Applications tab to display the dropdown navigation menu for the TouchNet licensed applications and select the desired application.

**Reminder:** Once you’ve logged in and authenticated, you will not be required to re-authenticate as you log in to your other TouchNet applications, during the same session.
3.4  Forgot Password

The Forgot Password link on the Account Login screen allows individual users to reset their password using Multi-Factor Authentication (MFA).

To change your password, follow these steps.

1  From the U.Commerce Account Login in screen, click the Forgot password? link.

2  On the Account Login screen, enter your username and click Continue.

3  Select an authentication type you would like to use to for the password change.
Select the desired authentication type

The authentication types are:

- (1) Phone
- (2) Email

(1) Phone

If you select phone as the authentication type the phone number associated with your MFA account displays (for security purposes, only the last four digits of the phone number are displayed).

Click Send Code or Call Me.

- **SEND CODE** - Code is sent to you via SMS text message. Once you receive the code, enter it in the field provided.
The account login screen displays the password and reenter password fields. Enter the new password and click Continue.

Your password is changed and you are navigated to the U.Commerce Central Welcome page.

**CALL ME** – You receive an automated call. When you answer the call, you are asked to press the # key to complete the verification process. Once you press the #, the call is disconnected and the Account Login screen displays the password change fields. Enter the new password, reenter the password and click Continue. Your password is changed and you are logged into U.Commerce. The U.Commerce Central Welcome page appears.

(2) Email

If you select Email as your authentication type, the Account Login screen displays the email associated with your MFA account. If this email is correct, click the Send verification code button.
A code is sent to your email, copy the verification code and enter it on the Account Login screen and click Verify code.

When the code is verified, your password is changed and you are logged into U.Commerce Central. The Welcome page appears.

**Note:** From this screen, you can also update the phone number and email related to your MFA account.
4.0  The U.Commerce Central Welcome Page

Once a user logs in to U.Commerce Central, the Welcome page appears. From the Welcome page users have access to a variety of information including the TouchNet Client Community, TouchNet News, and any of the TouchNet applications your school has licensed.

The U.Commerce Central Welcome page

As the U.Commerce administrator you have access to the Administration functions from the Welcome page. The Administration link displays in the navigation menu. See the "Administration" section for complete instructions on all the user management functions.

The Navigation Menu

The navigation menu across the top of the U.Commerce Central Welcome page displays the available links. From the Welcome page, you can access U.Commerce Central, the TouchNet Client Community, and any of the licensed TouchNet commerce applications your school has licensed.

To the right of the navigation menu users also have access to the Edit My Profile and Logout links by clicking on the dropdown arrow next to the user’s login name.

The following list describes each of the navigation menu tabs on the U.Commerce Central Welcome page.

<table>
<thead>
<tr>
<th>Link</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>Clicking the Home tab takes you to the U.Commerce Central Welcome page.</td>
</tr>
<tr>
<td>Dashboard</td>
<td>Hovering over the Dashboard tab displays the Dashboard dropdown menu where you can select to displays the Application View, Merchant View or TouchNet Ready Partners View.</td>
</tr>
</tbody>
</table>
### Link Description

<table>
<thead>
<tr>
<th>Link</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RECON1</td>
<td>● Clicking the RECON1 tab displays the RECON1 reconciliation reports. This tab displays on the Welcome page if your institution has licensed Heartland Transaction Services, using Heartland Payment Systems to process your credit, debit or ACH payment transactions.</td>
</tr>
<tr>
<td>Applications</td>
<td>● Hovering over the Applications tab displays the dropdown navigation menu for the TouchNet licensed applications (Payment Gateway, Bill + Payment, Business Office, Campus Merchant, Marketplace, PayPath, and SponsorPoint, etc.). The links displayed on the menu are based on the applications your school has licensed.</td>
</tr>
<tr>
<td>Administration</td>
<td>● Clicking the Administration tab displays the Administration page. From the Administration page you can manage your U.Commerce Central users, create communications templates, and change your localization settings.</td>
</tr>
<tr>
<td>Client Community</td>
<td>● Hovering over the Client Community tab displays the dropdown menu where you can select links to a variety of resources available on the TouchNet Client Community.</td>
</tr>
<tr>
<td>Help</td>
<td>● Clicking the Help tab opens a separate window displaying the online help topics for U.Commerce Central and the Dashboard.</td>
</tr>
<tr>
<td>View Bookmark Link</td>
<td>● Clicking the View Bookmark Link when you're on a page in U.Commerce Central allows you to create a link to the page. When you click the View Bookmark Link a separate window displays the URL for page you are on in U.Commerce Central. You can select this link to add a bookmark to U.Commerce.</td>
</tr>
</tbody>
</table>
| Edit Profile          | ● Clicking the dropdown arrow adjacent to your user name (in the far right corner of the page) displays the Edit Profile and Logout options. Click the Edit Profile link to display the User Profile page.  
● See "Editing the User Profile" on page 25, for more information about changing your U.Commerce Central profile information. |
| Logout                | ● Clicking the dropdown arrow adjacent to your user name (in the far right corner of the page) displays the Logout option. Clicking the Logout link closes the U.Commerce session. |

#### Client Community Links

Several Client Community links are available from the U.Commerce Central Welcome page. These links are displayed in the middle of the page. Click the desired link to access that information on the Client Community website.

The following table describes each of the Client Community links.
<table>
<thead>
<tr>
<th>Link</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify Exception Codes</td>
<td>● Clicking the Identify Exception Codes link takes you to the Exception</td>
</tr>
<tr>
<td></td>
<td>Codes Directory page on the Client Community where you can search for and</td>
</tr>
<tr>
<td></td>
<td>view an exception code.</td>
</tr>
<tr>
<td>Products and Services</td>
<td>● Clicking the Products and Services link displays the Products and Services</td>
</tr>
<tr>
<td></td>
<td>page on the Client Community where you can access a variety of guides and</td>
</tr>
<tr>
<td></td>
<td>bulletins for each of the TouchNet applications.</td>
</tr>
<tr>
<td>Security Central</td>
<td>● Clicking the Security Center link displays the Security Central page on</td>
</tr>
<tr>
<td></td>
<td>the Client Community where you can review case studies, read about the</td>
</tr>
<tr>
<td></td>
<td>latest PCI, PA-DSS developments, and check up on related security</td>
</tr>
<tr>
<td></td>
<td>information.</td>
</tr>
<tr>
<td>Support</td>
<td>● Clicking the Support link displays the Support home page on the Client</td>
</tr>
<tr>
<td></td>
<td>Community where you can access special support features, documentation,</td>
</tr>
<tr>
<td></td>
<td>training videos, and webinars.</td>
</tr>
<tr>
<td>TouchNet LIVE</td>
<td>● Clicking the TouchNet LIVE link displays the TouchNet LIVE registration</td>
</tr>
<tr>
<td></td>
<td>and access information on the Client Community website.</td>
</tr>
<tr>
<td>TouchNet Partners</td>
<td>● Clicking the TouchNet Partners link displays the TouchNet Ready page on</td>
</tr>
<tr>
<td></td>
<td>the Client Community website.</td>
</tr>
</tbody>
</table>
5.0 Editing My Profile

The Edit Profile feature gives individual users the ability to manage their own user profile information. The User Profile feature allows you to edit your personal information on the User Profile page and change your password using the Change Password page.

5.1 Editing the User Profile

Users have the ability to edit their own user profile information. The Edit Profile link allows users to view and edit their personal information and their localization settings. The link displays when you click on the dropdown arrow to the right of your name, located at the top right of the U.Commerce Central navigation menu.

To edit the user profile, follow these steps.

1. Click the dropdown arrow next to your name and click the Edit Profile link from the menu.

2. The User Profile page displays. To edit the user profile information, click the desired field you wish to change and enter the new information. For example, to change the email address, click the E-mail Address field and enter the new email.

   **Note:** The First Name, Last Name, and E-mail Address fields are required entries.
Chapter 5

The User Profile page

Localization Settings

3 To edit the date format, select the desired format from the dropdown list.

4 To edit the time zone, select the desired time from the dropdown list. For example, if your school is located in Denver, Colorado and that is Mountain Time, if you selected Mountain Time, your data would display in Mountain Time and you would see the MTN designation on the Dashboard. Central Standard Time is the default time zone.

5 To change the locale for your display, select the desired locale from the dropdown list. For example, if you wish to display U.S. dollars totals in Russian currency, select the applicable Russian selection from the dropdown. Your dollar amounts will display in Russian currency format.

6 When you have completed the changes to your profile information, click the Update Profile button to save your changes.

Note: If you decide you do not want to make the changes you entered, click the Reset button to return to your prior profile.
information. However, once you have clicked the Update Profile button, you cannot reset your information.

When you have completed the edits, click the Save button.

### 5.2 Changing Your User Password

Users have the ability to change their own U.Commerce Central password. The Edit Profile link allows users to view and edit their password setting. The Edit My Profile link displays at the top right of the U.Commerce Central navigation menu.

To change your password using the Edit My Profile link, follow these steps.

1. Click the dropdown arrow next to your name and click the Edit Profile link from the menu.

![The Edit Profile link](image)

2. The User Profile page displays. Click the Change Password tab. The Change Password page displays.

![The Change Password page](image)

3. To change your password, click the Current Password field and enter your current password.

4. Enter your new password in the New Password field. The password validator indicates the requirements for your new password and as you enter your new password, the validator indicates whether your new password meets all the password policy requirements.

   When you have entered a valid password, the validator indicates a status of “valid” and the entry requirements display in green.

5. Reenter your new password in the Confirm Password field.
When you have completed your password changes, click the Change Password button to save your changes. A message displays on the page indicating your password has been updated.
6.0 Viewing the U.Commerce Help

The Help link opens a separate window displaying the online help topics for U.Commerce Central. Click the Help button in the U.Commerce Central navigation menu to view the applicable help topics.

The U.Commerce Central Help link
U.Commerce Central Administration
7.0 Administration

The Administration section of U.Commerce Central provides a central location to manage U.Commerce Central users, create communications templates, view sponsor payments (SponsorPoint users only), configure your TouchNet licensed applications, and change your localization settings.

Note: The options that display in the Administration left navigation menu are determined by the users’ roles. You may not see all the available options that are described in this section.

From the Administration page you can access the following administrative options:

- **User Management** – You can create new users, manage editing users roles, manage your school’s password policy settings, and view user history.

- **Communications** – SponsorPoint and Bill + Payment 7 users can access a library of existing communications email templates, copy the existing templates, and customize them for their school’s use.

- **SponsorPoint Reconciliation** – SponsorPoint users can view sponsor payment postings.

- **System Configuration** – Users can set their localization settings. These settings apply to U.Commerce Central as well as TouchNet Payment Gateway. Users with the applicable roles can add or edit transaction manager settings and edit U.Commerce Central configuration settings.

Note: To make changes to the U.Commerce Central Operations Center settings you will need the Realm Administrator and Administer Dashboard roles assigned to you in U.Commerce User Management.
8.0 User Management

The U.Commerce Central Administration User Management allows you to create new users, assign user roles and permissions, edit user settings, activate and deactivate user accounts, lock and unlock a user account, manage your school's password policy settings, and view user history.

To navigate to the User Management page, click the Administration tab from the U.Commerce Central navigation menu. The Administration page displays. Click the User Management option in the left navigation menu. The Users page displays.

The User Management page

There are five components in User Management:

- **Users** – Access existing user accounts to view their creation date, last login, number of logins and status.
- **New User** – Create a new user account and grant them user roles and permissions.
- **Edit User** – Edit an existing user’s roles and permissions, reset their password, lock or unlock their user account, and view their user history.
- **Password Policy** – Manage your school’s password policy settings.
- **Mass User Manager** – Grant multiple users access to roles and permissions.

8.1 Creating a New User

To create a new user, follow these steps:
1. Click the Administration tab in the navigation menu. The Administration page displays.
2. Click the User Management option in the left navigation. The Users window displays.
3. Click the New User option to open the New User window.

![The New User window]

**Note:** All fields on the New User window are required.

4. Enter the new user name in the **User Name** field. The realm prefix is prepopulated and displays next to the Username field.
5. Enter an initial password for the new user in the **New Password** field.
   As you enter the password, the password validator indicates if the password requirements are being met. If the password is valid, the status indicates "Valid" and the requirements criteria display in green.
6. If the password is valid, reenter the password in the **Confirm Password** field.
7. Enter the new user’s first name in the **First Name** field.
8. Enter the new user's last name in the **Last Name** field.
9. Enter the user’s email address in the **E-Mail Address** field.
10. Click the Save button.

The Edit User window displays where you assign the new user’s roles. See "Assigning User Roles and Permissions" on page 36, for the steps to assign user roles and permissions.

### 8.2 Assigning User Roles and Permissions

Once you have created the new user, you are ready to assign the user roles and permissions. What screens a user can view and the actions they can perform in U.Commerce Central and the other TouchNet licensed applications is determined by the roles and permissions that are assigned to that user. Permissions define the individual screens a user has access to and
the tasks a user can perform. Roles are a collection of these individual permissions.

When users in the same department have access to different pages or they cannot perform the same actions on the same page, it’s typically because they have been assigned different roles and permissions. For example, a user with the Internal Administrator role can modify user information and assign user roles, however a user with the View U.Commerce Central role can only view information and cannot modify any information.

**Important!** Additional roles and permissions are also assigned within the licensed TouchNet applications. For example, merchant roles and permissions are assigned in Payment Gateway. Refer to the user guide for each of your TouchNet licensed applications (Payment Gateway, Bill + Payment, Marketplace, etc.) for more information.

### Assign User Roles

To assign user roles, follow these steps.

You must have the User Administration role to assign roles and permissions to a user.

1. From the Administration page, click the User Management option in the left navigation menu. The Users window displays.
2. Enter the desired user’s name in the **Search** field. Click on the user name, the Edit User window displays.

![The Edit User window](image)

**Note:** You can enter a partial user name to display a listing of similar user names. A list of possible users matching your search criteria displays.
3 From the list of Available Roles, select the desired roles to assign to the user using one of the following methods:

- click on the role to highlight it and click the Add button or
- double-click on the desired role or
- click the Add all button to give the user all the available roles.

The role displays in the roles list for the selected user.

Note: You can also assign multiple users using the Mass User Manager. Refer to the "Managing Roles for Multiple Users" on page 56 for more information.

4 Once you have assigned the user all the desired roles, click the Save button.

Roles and Permissions

The following tables list the user roles and permissions assigned in U.Commerce Central User Management. It lists the user roles, a brief description, and the permissions associated with the role.

Note: Based on the applications your school has licensed and how your roles are set up, the roles you see on your Edit User window may differ from this list. You may not see all these roles.

**U.Commerce Central Roles and Permissions**

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Permissions</th>
</tr>
</thead>
</table>
| User Administration | View, create, edit and manage user account information in U.Commerce Central User Management | ● Access, view, and modify U.Commerce Central User Management options
● Create users
● Edit user settings
● Modify user roles
● Reset user passwords
● Lock/Unlock user accounts
● Modify password policy
● Create users
● Create key manager and key generator users
● View user listings
● View user history
● Manage localization settings |
<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Permissions</th>
</tr>
</thead>
</table>
| Realm Administration     | Assigned to TouchNet personnel only - View, create, edit and manage realms in U.Commerce Central User Management                                                                                          | ● Access, view, create, and modify user realms  
● Create and edit user realms  
● Create and edit system realms  
● Create and edit institution realms |
| Internal Administrator   | For on-campus users - Manage users on-campus  
For Data Center users - assigned to TouchNet personnel only, used to manage clients in the Data Center                                                                                      | ● Access, view, and modify locations  
● Modify users  
● Modify roles  
● Assign roles  
● Unlock other workspaces |
| View Dashboard           | View the U.Commerce Dashboard Application View                                                                                                                                                               | ● View only access to the U.Commerce Central Dashboard  
● View only access to U.Commerce Mobile |
| Administer Dashboard     | Access, view, and edit the U.Commerce Central Operations Center                                                                                                                                              | ● Access to the U.Commerce Central Operations Center URL  
● View and edit the U.Commerce Central Operations Center |
| View U.Commerce          | View only access to U.Commerce Central                                                                                                                                                                         | ● View only access to the U.Commerce Central Operations Center |
| CMM Admin                | Assigned to TouchNet personnel only - Manage U.Commerce organizational units, realms, application modules, ACE sites                                                                                         | ● Access CMM administration  
● Administer organizational units, realms, ACE sites, application configuration, and advanced application configuration |
| View Dashboard Mobile    | View Mobile Dashboard                                                                                                                                                                                          | ● Access and view U.Commerce Mobile |
| Key Manager              | Access, view, and modify the U.Commerce Central User Management allowed to enter a portion and a full Key Encryption key (KEK)                                                                                  | ● Access U.Commerce User Management screen  
● Assigned to minimum of two users  
● Generates a portion and the full Key Encryption key (KEK)  
● User assigned this role cannot be assigned the Key Generator role  
● Only applicable if TouchNet solutions are hosted on campus |
<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Permissions</th>
</tr>
</thead>
</table>
| Key Generator   | Enters a portion and a full Key Encryption key (KEK) to change a school's encryption key. | ● Access to U.Commerce User Management page  
● Generates a portion and a full Key Encryption key (KEK)  
● Initiates creation of the school’s new Key Encryption key  
● User assigned this role cannot be assigned the Key Manager role  
● Only applicable if TouchNet solutions are hosted on campus |
| Communication Manager | Manages CMM communication templates                                      | ● Access to CMM Administration  
● Administer communications application |
| User Support    | Assigned to TouchNet personnel only - Administers user accounts            | ● Access to U.Commerce Central User Management page  
● View, manage and create users  
● Reset user passwords  
● Lock and unlock user accounts  
● View user history |
| U.Commerce Admin| Assigned to TouchNet personnel only - Administers U.Commerce Central      | ● Access to view and manage U.Commerce Central |
| Users and GL    | Assigned to TouchNet personnel only - Administers GL users accounts        | ● Access to U.Commerce Central User Management page  
● View, manage and create users |
## Bill+Payment Roles and Permissions

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>TBP System Settings</td>
<td>Full access to all tasks and features in Bill + Payment</td>
<td>• Select student system type and default HSA</td>
</tr>
<tr>
<td>Administrator</td>
<td>(highest level of user for Bill + Payment assigned to an administrative user at a school)</td>
<td>• Set user login timeout, local time zone, current activity date format, and mobile URL</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Edit license key</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Enter mail server for outgoing messages</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Turn on/off mobile payments</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Enter URL for student application</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Configure PayPath and T-Link</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• View and edit security related settings in the TBP payment account center</td>
</tr>
<tr>
<td>Role</td>
<td>Description</td>
<td>Permissions</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| TBP Business Settings Administrator| Access to all pages in Bill + Payment but cannot change technical system settings | • Host System Integration-select amount on Welcome page, set estimated aid in displayed balances, include zero balance terms, manage terms and alternate host system accounts.  
• General Configuration-change institution name, Important Information label and URL, PIN labels, header and footer images, allow/disallow authorized users, enable alternate email addresses, enable text message alerts  
• Batch Process Configuration-delete archived plan disclosures, change plan recalculation frequency, set offline scheduling options  
• E-mail Configuration-set return, administrator, help email address, change default email ending  
• Mobile Configuration-change mobile login and PIN labels, mobile login method, AVS and account confirmation options, edit header, footer and logo image, generate QR codes  
• Payment Configuration-All tasks except PayPath and T-Link setup  
• View and edit security related settings in the TBP payment account center |
| TBP Customer Service View Only     | Access to view all student details, send emails to student or authorized users | • View only access to student details  
• Send emails to students or authorized users |
| TBP Reporting View Only            | Access to view all TBP reports but cannot use administrative functions within the reports | • View only access to TBP reports  
**Note:** Cannot use the administrative features of reports even if another of their assigned roles permits access to these features |
<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Permissions</th>
</tr>
</thead>
</table>
| TBP General Operations Manager            | Performs day to day administrative activities, but cannot edit system settings or change business config options | ● Host System Integration-exclude codes from current activity, manage terms  
● Batch Process Configuration-manage offline scheduling  
● Mobile Configuration-manage QR codes  
● Payment Configuration-lock, edit, blank payment amounts, manage hold codes, enable/disable displayed payment options |
| TBP Payment Plan Manager                  | Performs all tasks related to payment plans, can view only those pages and features in the Bill + Payment Operations Center | ● Access to Manage Payment Plans page  
● Access to these reports: Plan Enrollment, Plan Revenue, Plan Aging, Plan Delinquency, Recalculation Posting, Charge Posting, Plan Agreement History, and Payment Plan Rollover Exceptions |
| TBP eDeposits Manager                     | Performs all tasks related to deposit payments                               | ● Full access to the eDeposits page and Customer Service |
| TBP eRefunds Manager                      | Performs all tasks related to eRefunds                                      | ● Full access to Manage eRefunds and eRefunds Configuration pages and Customer Service  
● Access to the eRefunds Report, eRefunds Accounts Reports, and eRefunds Posting Report |
<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>TBP eStatements Manager</td>
<td>Perform all tasks related to eBills and 1098-T statement</td>
<td>Full access to Customer Service, and to the following pages and reports:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● eBill Statement loading</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● eBill Configuration</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● 1098-T Configuration</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● eBill Access report</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Paper Bill report</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● 1098-T Consent report</td>
</tr>
<tr>
<td>TBP Customer Service</td>
<td>Perform all tasks in Customer Service</td>
<td>● View and edit Customer Service</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Ability to view the student application</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Emulate student activities</td>
</tr>
<tr>
<td>TBP Communications Manager</td>
<td>Managed communications (emails, etc.) targeted to students and authorized users</td>
<td>● Ability to view, edit, and manage communications for students and authorized users</td>
</tr>
<tr>
<td>TBP Payment Returns Manager</td>
<td>Manage payment returns functionality</td>
<td>● Ability to view, edit, and manage payment returns</td>
</tr>
<tr>
<td>TBP Security Settings Manager</td>
<td>Manage security related settings in the TBP payment account center</td>
<td>● View and edit security related settings in the TBP payment account center</td>
</tr>
</tbody>
</table>

*For additional information about the Bill + Payment roles and permissions, refer to the Managing Bill + Payment Operations Center Users section of the Bill + Payment User Guide.*
## Cashiering Roles and Permissions

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Permissions</th>
</tr>
</thead>
</table>
| CME Supervisor                    | Set of default permissions for Campus Merchant Edition (CME) cashiering supervisors | ● Buy cash from vault  
● Open drawer  
● Sell cash to vault  
● Start drawer different amount  
● Establish/Disconnect a cashiering station  
● Monitor cashiering activity  
● Review and submit closed drawers  
● Export report data to CSV  
● Export report data to PDF  
● Access and view Campus Merchant Edition reports  
● Review other cashiers reporting data  
● Access and review stored customer signatures and check images  
● Unlock user's workstation |
| U.Commerce Central Administrator  | Manage locations, users, roles, and G/L codes in U.Commerce                 | Campus Merchant:  
● Modify locations  
● Modify item sets  
● Modify GL codes  
● Modify users  
● Assign and modify roles  
● Unlock other workspaces |
| CME Cashier                       | Permissions for Campus Merchant Edition cashiers                             | ● Begin cashier session  
● Access and view Campus Merchant Edition reports  
● Void and discount past transactions  
● View and reprint past receipts  
● Export report data to PDF  
● Close and balance cash drawer |
| U.Commerce Central Accountant (Cashiering Campus Merchant) | Monitor and submit financial data in U.Commerce | Campus Merchant:  
- Monitor cashiering activity  
- Review and submit closed drawers  
- Submit to general ledger  
- Create free form reports  
- Export to CSV and PDF  
- Reporting access  
- View other cashier’s reports  
- View secured images |

### SponsorPoint Roles and Permissions

| SponsorPoint Roles & Permissions | Requires:  
- View sponsor records  
- Update sponsor settings  
- Manage sponsor payments  
- Manage statement settings  
- Manage sponsor invitations and users  
- Access to all tabs within SponsorPoint: Customer Service, Manage Payment, Manage eBills, and Manage SponsorPoint settings  
- Manage SponsorPoint users  
- View student account line items  
- View student class schedules  
- Emulate sponsor user to access sponsor user (view only) for support purposes |

<p>| SponsorPoint Account Manager | Manages and edits sponsors in the SponsorPoint application |</p>
<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>SponsorPoint Admin</td>
<td>Manages and performs all functions in the SponsorPoint application</td>
</tr>
<tr>
<td></td>
<td>• View sponsor records</td>
</tr>
<tr>
<td></td>
<td>• Update sponsor settings</td>
</tr>
<tr>
<td></td>
<td>• Manage sponsor payments</td>
</tr>
<tr>
<td></td>
<td>• Access to all tabs and can perform all functions within SponsorPoint: Customer Service, Manage Payment, Manage eBills, and Manage SponsorPoint settings</td>
</tr>
<tr>
<td></td>
<td>• Manage SponsorPoint users</td>
</tr>
<tr>
<td></td>
<td>• Emulate sponsor user to access sponsor user (view only) for support purposes</td>
</tr>
<tr>
<td></td>
<td>• Manage GoArmyEd invoice load process</td>
</tr>
<tr>
<td></td>
<td>• View SponsorPoint reports</td>
</tr>
<tr>
<td>SponsorPoint Cashier</td>
<td>Manages sponsor payments in the SponsorPoint application</td>
</tr>
<tr>
<td></td>
<td>• View sponsor records</td>
</tr>
<tr>
<td></td>
<td>• Manage sponsor payments</td>
</tr>
<tr>
<td></td>
<td>• View SponsorPoint sponsor records</td>
</tr>
<tr>
<td></td>
<td>• View student account line items</td>
</tr>
<tr>
<td></td>
<td>• View student class schedules</td>
</tr>
<tr>
<td>SponsorPoint User</td>
<td>Role assigned to user at a sponsor organization who uses SponsorPoint to make payments and view</td>
</tr>
<tr>
<td></td>
<td>• View and manage your own user profile</td>
</tr>
<tr>
<td></td>
<td>• View online statements</td>
</tr>
<tr>
<td></td>
<td>• Make payments from online statements</td>
</tr>
<tr>
<td></td>
<td>• Edit or delete payment information from the Payment Profiles page</td>
</tr>
<tr>
<td>SponsorPoint Customer Service</td>
<td>Provides customer service in the SponsorPoint application</td>
</tr>
<tr>
<td></td>
<td>• View sponsor records</td>
</tr>
<tr>
<td></td>
<td>• Access to the Customer Service page</td>
</tr>
<tr>
<td></td>
<td>• View student account line items</td>
</tr>
<tr>
<td></td>
<td>• View student class schedules</td>
</tr>
<tr>
<td></td>
<td>• Emulate sponsor user to access sponsor user (view only) for support purposes</td>
</tr>
</tbody>
</table>
SponsorPoint eBills Manager
(listed as eBills Administrator in U.Commerce Central User Management Roles)

Manages eBills in the SponsorPoint application

- View sponsor records
- Update sponsor settings
- Access and manage sponsor eBills
- View SponsorPoint sponsor record
- View student account line items
- View student class schedules

SponsorPoint Army Manager

Manages the GoArmyEd invoice load process

- View sponsor records
- Manage sponsor payments
- View Access and query sponsor records
- View student account line items
- View student class schedules
- Manage the GoArmyEd invoice upload process

### Bank Wire Roles and Permissions

| Bank Wires Roles & Permissions | Access to view and manage FX Gateway payment information (Assigned to a user at a school) | Access, view, and manage payment information
| International Payments Manager | Manage FX Gateway payment information on the Service Admin application (assigned to TouchNet personnel) | Access, view, and manage payment information
| International Payments Service Admin | Access to view FX Gateway payment information | Access payment information
| International Payment Service Support | | View customer information
| | | View agent files processed
| | | View payments

### 8.3 Searching for an Existing User

From the Users window you can search for an existing user by a variety of user criteria. You can search by user name, first name, last name, created
date (or a partial date), last login date (or a partial date), and number of logins. You can also enter partial search criteria to display a listing of users with similar criteria.

To search for an existing user, follow these steps.

1. From the U.Commerce Welcome page, click the Administration tab in the navigation menu and click the User Management option in the left navigation menu. The Users window displays.

   ![](Users.png)

   The Users Search field

2. If your school has multiple realms, select the desired realm from the Realms dropdown menu.

3. Enter the desired search criteria in the Search field.

   Note: You can enter full or partial search criteria to locate the desired user. You can search by first name, last name, partial first or last name, created date (or a partial date), last login date (or a partial date), or number of logins.

4. A listing of users matching your search criteria displays below the Search field. Click on the desired user.

5. The Edit User window opens and displays the selected user's information. From the Edit User window you can edit a user's roles, reset their password, lock/unlock their account, deactivate/activate their account, and view the user's history.

8.4 Editing User Settings

From the Edit User window you can edit a U.Commerce user's roles, reset their password, lock and unlock their account, activate and deactivate their account, and view the user's history.
You must have the User Administration role to edit a user’s settings.

To access the Users page, follow these steps.

1. From the U.Commerce Central Welcome page, click the Administration tab in the navigation menu and click the User Management option in the left navigation menu. The Users window displays.

2. If your school has multiple realms, verify the correct realm is displayed or select the desired realm from the Realms dropdown menu.

3. A list of users displays.
   You can also enter the desired user's name or a partial name in the Search field. A listing of users matching your search criteria displays below the Search field. Click on the desired user.

4. The Edit User window displays. Make the desired edits to the user information.

   From the Edit User window you can:
   ▪ Add or remove user roles
   ▪ Reset the user's password
   ▪ Lock or unlock the user’s account
   ▪ Deactivate or activate the user’s account
   ▪ View the user’s history

   Refer to the applicable sections of this guide for more information about each of these actions.

5. Click the Save button.

**Editing User Roles**

You can add or remove roles for existing users from the Edit User window in User Management. You must have the User Administration role to edit a user’s roles.

To edit the user’s roles, follow these steps.

1. In the Edit User window, click on the Roles button. The listing of available roles and roles assigned to the user display.

   **To add new roles**, From the list of Available Roles, select the desired roles to assign to the user using one of the following methods:
   ○ click on the role to highlight it and click the Add button or
   ○ click the Add all button to give the user all the available roles.

   The role displays in the roles list for the selected user.

   **To remove an existing role**, From the list of user’s roles, select the desired roles to remove using one of the following methods:
● click the role in the user’s roles list and click the Remove button or
● click the Remove all button to remove all the roles from the user.

The role(s) is removed from the user’s list and displays in the Available Roles list.

2 Once you have added or deleted the desired user roles, click the Save button.

Resetting the User Password

In the event you need to change a user’s password, you can access the existing user information on the Edit User window. A user’s password might need to be reset if they let their password expire or if the user forgot their password. If it is necessary for you to reset a user’s password, you must have the User Administration role.

**Note:** Individual users also have the ability to reset their own password.

To reset an existing user's password, follow these steps.

1. From the Edit User window, click on the Reset Password button. The Reset Password fields display in the Edit User window.
2. Enter a reason for resetting the user’s password in the Reason for resetting field.
3. Enter the new password in the **New Password** field. As you enter the new password, the password validator indicates whether the new password meets all the password policy requirements.

   When you have entered a valid password, the validator indicates a status of “valid” and the entry requirements display in green.
4. Reenter the new password in the **Confirm Password** field.
5 Click the Reset Password button. A confirmation message indicating the password was reset displays at the bottom of the window. The user's password is changed.

8.5 Deactivating a User Account

From the Edit User window you can deactivate a U.Commerce Central user’s account.

You must have the User Administration role to deactivate a user’s account.

To access the Edit User window, follow these steps.

1 In the Edit User window, click the Deactivate Account button.

2 Enter the reason you are deactivating the user account in the Reason for locking (deactivating) field.

3 Click the Deactivate Account button. The user’s status changes to Disabled.

Note: Once the user account is deactivated, the Lock Account button label changes to Unlock Account. The Unlock Account button is grayed out and cannot be selected.

8.6 Reactivating a User Account

From the Edit User window you can reactivate a previously deactivated U.Commerce Central user’s account.

You must have the User Administration role to reactivate a user’s settings.

To access the Edit User window, follow these steps.

1 From the Users window, click on the desired deactivated (disabled) user’s name. The Edit User page displays the user’s information.

Note: The Unlock button is grayed out.
2 Click on the Activate Account button.

3 Enter the reason for unlocking/reactivating the user account.

4 Click the Activate button. The user is reactivated and their account is unlocked. The user's status changes to Active.

Note: The Unlock button label changes to Lock and is no longer grayed out.

8.7 Locking and Unlocking a User Account

There may be circumstances where a user's account is locked. An account may be locked if the user has 3 or more consecutive unsuccessful attempts to login to U.Commerce Central or any of the TouchNet applications. A user’s account may also be locked if the User Administrator locks their account for a specific reason, such as the user going on an extended leave of absence or moving to a new department.

Note: The default maximum number of consecutive failed logins before an account is locked is 3. Your school may choose to change this default setting.

In the first circumstance, if the user's account is locked after several consecutive unsuccessful login attempts, the user may unlock their account by using the Forgot Password link on the U.Commerce Central login page.

If the user's account is locked by the User Administrator, the user's account must be unlocked by the administrator.
**Locking a User Account**

To lock a user account so the user cannot access U.Commerce Central or the other licensed applications, follow these steps.

1. From the User Management page, click the desired user’s username link on the Users window. The Edit User window displays.

2. Click the Lock account link. The Lock Account window displays.

3. Enter a brief reason for locking the user account in the **Reason for locking** field.

4. Click the Lock Account button. The user’s account is locked.

   **Note:** The Lock Account button is a toggle, so depending on the status of the user’s account, the button will either display "Unlock" if the user’s account is locked, or "Lock" if the user’s account is unlocked.

**Unlocking a User Account**

To unlock a user account that was previously locked, follow these steps.

**Note:** If the user successfully completes the Forgot Password steps, their user account is unlocked and you do not have to complete these steps to unlock the user account.

1. In the Edit User window, click the Unlock Account button. The Unlock Account fields display.

2. Enter a brief reason for unlocking the user account in the **Reason for unlocking** field.

3. Click the Lock Account button. The user’s account is unlocked. The user now has access to U.Commerce Central and the other licensed TouchNet applications.
8.8 Editing Password Policies

The Password Policy window is used to view or change your current password policy for U.Commerce Central. You must have the User Administration role in order to edit your school's password.

To access the Password Policy window, follow these steps.

1. Click the Administration tab in the navigation menu. The Users window displays.

2. Verify that the correct realm is displayed. If you have multiple realms, you can select the applicable realm from the dropdown list.

3. Click the Password Policy link. The Password Policy window displays.

   **Note:** The minimum or maximum values are preset by TouchNet. These presets cannot be changed.

4. The following Password Policy fields can be edited:

   **Minimum length**
   The minimum number of characters a password must contain.

   **Maximum length**
   The maximum number of characters a password can contain.

   **Minimum numeric characters**
   The least number of numeric characters that a password must contain.

   **Minimum lowercase characters**
   The least number of lowercase characters that a password must contain.

   **Minimum uppercase characters**
   The least number of uppercase characters that a password must contain.

   **Minimum special characters**
   The least number of special characters that a password must contain.

   **Days until expiration**
   The number of day before a user's password expires.

   **Number of passwords that must be chosen before a password can be reused**
The minimum number of new passwords that must be created and used before a users can reuse a previous password.

**Maximum consecutive failed logins before account is locked**
The maximum number of unsuccessful password login attempts a user can perform before their account is locked. The user must contact their User Administrator to request their account be unlocked. Only the User Administrator can unlock a user’s account.

**Days before password expiration to being alerting the user**
The number of days before a user’s password expires when the User Expiration Warning message appears on the U.Commerce Central Welcome page.

4 To edit a policy setting click on the dropdown arrow for the desired field and select the desired change from the menu.

5 When you have changed all the desired password policy fields, click the Save button. The password policies are changed.

Important! Current users will not be prompted to change their passwords to meet the new password policy requirements until the next time their passwords are set to expire.

## 8.9 Managing Roles for Multiple Users

The Mass User Manager allows you to add or remove the same role for a large number of users at one time. This eliminates the need to access each user account individually.

You must have the User Administration role to make mass user role changes.

To edit multiple users roles, follow these steps.

1 From the Users window, click the Mass User Manager link. The listing of available roles displays.

2 From the list of Available Roles, select the desired role(s) you want to assign to multiple users. If you want to select multiple roles, hold down the Ctrl key and click on the desired roles, or hold down the left mouse button and move up or down to select the desired roles.

3 Click the List Roles and Users button. A listing of all the existing U.Commerce Central users for the selected realm display. For all existing users who currently have the role(s) you selected, a checkmark appears in the checkbox to the left of the user name.
4 To select all the users and give them the selected role(s), click the Select All button.

5 To remove access from all users who currently have access to the selected role(s), click the Select None button. All checkmarks are removed from the user name checkboxes and the users will no longer have access to that role.

6 Once you have selected or deselected all the desired users and roles, click the Update User(s) button.

7 Once you have assigned the users all the desired roles, click the Save button. A message displays at the bottom of the window indicating you have successfully updated the user roles.

8.10 Viewing a User's History

The History window displays a list of a user's permissions, tasks performed, and messages about user authentication and account activity in U.Commerce Central. To view a user's history log, follow these steps.

You must have the User Administration role to view a user's history.

1 Click the Administration tab in the navigation menu. The Administration page displays. From the Administration page, click on
the User Management option in the left navigation menu. The Users window displays.

2 If your school has multiple realms, select the desired realm from the Realms dropdown menu.

3 A listing of users displays. Click on the desired user name.

You can also enter the desired search criteria in the Search field.

**Note:** You can enter full or partial search criteria to locate the desired user. You can search by first name, last name, partial first or last name, created date (or a partial date), last login date (or a partial date), or number of logins.

4 The Edit User window displays. Click the History button. The dates and the activity login and activity history for the user displays.

To view additional pages of history, click the right arrow keys to view the next page or the left arrow keys to view the previous page.
9.0 Communications

From the Communications page SponsorPoint and Bill + Payment 7 users can access a library of existing communications templates, copy the existing templates, revert to a previously saved template, and customize it for their school’s use.

9.1 Editing an Existing Template

Follow these steps to navigate to the Communications page and edit an existing template.

1. Click the Administration tab from the U.Commerce Central navigation menu. The Administration page displays. Click the Communications link in the left navigation menu. The Communications templates options display.

2. Click the Edit Existing Template option.
Select the Edit Existing Template option

3 Select the desired template type from the Select a Template dropdown menu.

Select the desired template

4 Select the desired existing template from the Select an Existing Template dropdown menu.
Select the desired existing template

5 The template text is displayed in the window. From this window you can edit the template to include:

- selecting different font styles and sizes
- changing the appearance of the text (bold, italics, underline, indent, etc.)
- adding optional elements to the body of the template
Once you have completed your edits, you can click the Preview button to view the template with your changes incorporated.

Click the Save button to save your changes to the template.

Reverting To a Previous Template

Users can revert to a previously saved version of a template by reviewing the desired template’s revision history and clicking on the Revert button. Follow these steps to access the revision history and revert to a previously saved template.

1. From the Communications > Edit Existing Template page, select the desired template from the Select a Template dropdown menu.

2. Select the desired existing template from the Select an Existing Template dropdown menu.

3. Click the Revision History link. The Template Revision History popup window displays.
The Template Revision History window

4 Click the desired previous version of the template. The Template Preview window displays.

The Template Preview window

5 Review the template in the preview window to ensure you wish to revert to this version of the template.

Note: If you select to revert to a previous version, the template that you revert to becomes the current template.

6 Click the Revert button. Click OK to confirm you wish to revert back to this template version.

Copying From an Existing Template

Follow these steps to navigate to the Communications page.

1 Click the Administration tab from the navigation menu. The Administration page displays. Click the Communications link in the left navigation menu. The Communications templates options display.
2 To view a listing of the existing communications templates that have been created, click the Copy from Template heading. The Copy From Template window displays

3 Click on the Copy from Organizational Unit dropdown arrow and select your applicable organizational unit from the menu. This is particularly important for schools with multiple organizational units, so that you can customize the templates specifically for your individual organizational unit.

**Note:** To display the listing of the TouchNet created templates, click the Default organizational unit.

4 Click the Template to Copy dropdown arrow and select the desired template from the menu listing.

5 Click the Copy button.
   - If you receive a message that the template already exists, there is already a template created and saved by the same name.
   - If you receive a message that the template was saved, you successfully copied the template.

6 If the template is saved, click OK.
10.0 SponsorPoint Reconciliation

From the Administration tab, SponsorPoint users can review a listing of sponsor payments posted during a specific time period.

1. To access the SponsorPoint Reconciliation page, click on the Administration tab in the U.Commerce Central navigation menu.

2. From the Administration menu, click the SponsorPoint Reconciliation button in the left navigation. The ERP Postings page displays.

3. Select the desired beginning and ending date for the sponsor payment postings and click the Search button. The Search results are displayed on the page.
11.0 System Configuration

View and edit your system configuration settings by selecting the System Configuration option from the Administration page. From the System Configuration page you can view and edit the following settings:

- Organizational Units – The organizational unit is a unique code assigned to your school and is used to identify your school.
- Transaction Manager Settings – The transaction manager settings are used to identify the location of the transaction manager for your U.Commerce Central application.
- Default Localization Setting – The Localization settings determine how the date, time and locale display in U.Commerce Central.
- U.Commerce Central Configuration Settings – The U.Commerce Central Configuration settings contain instructions for each of the U.Commerce 7 applications that your school has licensed.
- Web Service Connections Configuration Settings

11.1 Entering Your U.Commerce Transaction Manager Settings

The transaction manager settings are used to identify the location of the transaction manager for your U.Commerce Central application.

Note: To enter or edit the transmanager settings, you need to log in with your school’s institution user name and password. For example, C123456.msmith. You must also have a TNIS user ID to enter these settings.

To enter your transmanager settings, follow these steps:

1. Log in to U.Commerce Central using your institution user name and password.
2. From the U.Commerce Central Welcome page, click the Administration tab. The Administration page displays.
3. To look up your school’s institution ID, enter your school’s institution ID in the Look Up Organizational Units field and click Lookup.
4. Select your school’s institution ID.
5. Click the System Configuration link in the left navigation. Click the Transmanager Settings button. The Transmanager Settings page displays.
To complete this section, locate the `transmgr.xml` file for the values needed to complete the following transaction manager settings fields.

**IP**
Enter the IP address of the computer housing the transaction manager file.

**Port**
Locate the following line in the `transmgr.xml` file to locate the port number: `<Port UseSSL="false">`. Enter the port number in the **Port** field.

**Client ID**
Locate the following line in the `transmgr.xml` file to locate the client ID: `<Admin>`. Enter your client ID designation in the **Client ID** field.

Click the Advanced link to display the advanced settings.

**Subtranscode**
Enter zero (0) in the **subtranscode number** field.


**Timeout**

The timeout time should be set to 300 seconds (5 minutes). The web application timeout requirement is 5 minutes.

**Encryption Type**

Enter TN_DRV.

7 Click the Save button.

11.2 Completing the PayPath Configuration Settings

If your school has licensed the TouchNet PayPath application, you will need to complete the PayPath configuration settings.

**Note:** The Transaction Manager settings must also be completed if your school uses PayPath. These settings are set at the institution level (i.e., C123456).

To complete the PayPath configuration settings, follow these steps.

1 From the Transaction Manager Settings page, locate the PayPath section and enter the IP field and enter the IP address of the computer housing the PayPath application.

*The PayPath Configuration Settings*
2 Enter the port number where your PayPath Operations Center is located. In the above example the port number would be: 9450.

3 Enter your client ID designation in the Client ID field.

4 Enter zero (0) in the Subtransaction Code field.

**Advanced**

5 In the Timeout field, enter the timeout time. The timeout time should be set to 5 minutes (300 seconds). The web application timeout requirement is 5 minutes.

6 Enter TN_DRV in the Encryption Type field.

7 Click the Save button.

### 11.3 Default Localization Settings

To access the Default Localization Settings page, click on the Administration tab in the U.Commerce Central navigation menu. From the Administration menu, click the System Configuration option in the left navigation. The Default Localization Settings page displays.

**Important!** These settings only affect the date, time and locale information within U.Commerce Central. It does not apply to your other licensed TouchNet applications (i.e., Bill+Payment, Payment Gateway).

To change your default localization settings, follow these steps.

1 To edit the date format, select the desired format from the dropdown list. The next time you access the Dashboard, the time-related data will display in the time zone format you selected. For example, if you selected yyyy-dd-mm, any applicable dates will display in that format on the Dashboard.

2 To edit the time zone, select the desired time from the dropdown list. For example, if your school is located in Denver, Colorado and that is
Mountain Time, if you selected Mountain Time, your data would display in Mountain Time and you would see the MTN designation on the Dashboard. Central Standard Time is the default time zone.

3 To change the locale you wish the Dashboard totals to display in, select the desired locale from the dropdown list. For example, if you wish to display U.S. dollars totals in a format for Russian, select the applicable Russian selection from the dropdown. Your dollar amounts will display in Russian format.

**Note:** The dollar amounts are still in U.S. dollars, just the display format would change to the locale you selected.

4 When you have completed the changes to your profile information, click the Save button.

### 11.4 Viewing and Editing Your U.Commerce Central Configuration Settings

This section contains the URLs for each of the U.Commerce applications that your school has licensed.

**Note:** To make changes to the U.Commerce Central Configurations settings you will need the Internal Administrator, Realm Administrator, and Administer Dashboard roles assigned to you in U.Commerce User Management.

To enter the URLs for your TouchNet licensed applications, follow these steps.

1. From the Administration page, select the System Configuration option in the left navigation menu.

2. Click the U.Commerce Central Configuration arrow to display the configuration settings.
The U.Commerce Central Configuration settings

3 Click the Edit button.

Important! Use caution when adding or changing these settings.

4 For each of your U.Commerce Central components enter the URL where they are installed on your campus. For a typical U.Commerce Central setup you would enter URLs for:
   ▪ News and Events
   ▪ Client Community
   ▪ Single Signon (this is your CAS URL)
   ▪ U.Commerce Central
   ▪ Profile Manager
   ▪ Administration
   ▪ other TouchNet applications you have licensed (i.e., FX International, U.Commerce Mobile, Secure Printing)

5 Click Save.
11.5 Viewing and Editing Your Web Service Connections Configuration Settings

The Web Service Connections Configuration section contains the URLs, system user name, and password for each of the web services that your school has licensed. For example, if your school uses PayPath, you would see the PayPath configuration settings section.

**Note:** To make changes to these settings you will need the Internal Administrator, Realm Administrator, and Administer Dashboard roles assigned to you in U.Commerce User Management.

**Important!** Use caution when adding or changing these settings.

To view or edit your web service settings, follow these steps.

1. From the Administration page, select the System Configuration option in the left navigation menu.
2. Click the Web Service Connections Configuration arrow to display the web service configuration settings.
The Web Service Connections Configuration settings

3. Click the Edit button.

4. Enter the URLs for each of the Operations Centers.

5. Add or change the user name and password fields, if applicable.

**Important!** Use caution when adding or changing these settings.

6. Click Save.
The Dashboard Views
12.0 The U.Commerce Central Dashboard Application View

The U.Commerce Central Dashboard Application View provides one central, consolidated view of how money moves on campus. It shows summary graphs and tables that highlight payment activity across campus and provides a single source for viewing alerts generated throughout your U.Commerce applications. It offers administrators a convenient snapshot of the cumulative effects of commerce transactions processed throughout the day, and offers the ability to drill down into more details for areas of interest or for warnings and alerts. Plus, it provides a single point to keep tabs on the “pulse” of commerce activity across the entire campus enterprise.

The Dashboard Application View is view only. You cannot resolve issues from the Dashboard, you must access the application where the issue occurred to make any changes or resolve an issue. If there is an action needed for a transaction listed on the Dashboard Application View, you can click on the link in the Action column to navigate to the application and resolve the issue.
Chapter 12

12.1 Choosing the Date Range and Start Time

When viewing U.Commerce Central activity on the Dashboard, you can narrow or broaden the scope of the data displayed by selecting a desired date range and start time. The Start and End date and time fields are located at the top of the page. The date range defaults to the current date and time.

To filter the data displayed on the Dashboard, select the desired start date, end date, and time using one of the following options:
Using the Calendar

1. To select the desired start and end date, click in the Start or End Date field. The calendar displays.
   - To change the month, click the dropdown arrow and select the desired month from the menu.
   - To change the year, click the dropdown arrow for the Year field and select the desired month from the menu.
   or
   - Click the left and right arrows keys to locate the desired month. Use the left arrow to select a previous month. Use the right arrow key to select a future month.

2. To change the time, use the hour and minute slider buttons to select the desired hour and minute.
   
   Note: The time is display in military time format.

3. To select the current date and time, click the Now button at the bottom left of the calendar.

4. When you have completed all your date and time settings, click the Done button.

5. Click the View button. The data for the selected date(s) and time displays on the Dashboard.

Using the Quick View

To select a default date from the quick view, follow these steps.

1. Click the dropdown arrow to the left of the View button and select the desired quick view selection from the dropdown.

2. The start time field defaults to the current time.

3. Click the View button. The data for the selected date(s) and time displays on the Dashboard.

Using the Quick Range Date Field

The quick range field allows users to quickly select the date range from a predefined list of date ranges.

To select a quick range date, follow these steps.

1. From the U.Commerce Central Dashboard date range, select the desired predefined date range from the dropdown list to the left of the View button.
The Quick Range Date field

2. Click the View button. The desired information displays on the Dashboard for the date range selected.

The U.Commerce Central Dashboard
12.2 Viewing Actions Required

The Actions required section at the top of the Dashboard, displays issues with the U.Commerce applications that need attention. This section is updated with issues in real time throughout the day. If issues in the selected date range require resolution, they appear in red in this section.

<table>
<thead>
<tr>
<th>Actions Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>ERP Transactions Received Summary</td>
</tr>
<tr>
<td>uPay Postings</td>
</tr>
<tr>
<td>Payment Gateway Alerts</td>
</tr>
</tbody>
</table>

The Actions required section on the Operations Center

Click the link to navigate to the Dashboard section that contains the error or problem.

Note: The Payment Gateway Alerts link opens the Payment Gateway Alerts page in the TouchNet Payment Gateway Operations Center. From the page you can view and manage open, payment-related action items. The Payment Alerts page is available for TouchNet Payment Gateway and TouchNet Payment Center users, which includes Heartland Transaction Services users. Based on the application you have licensed, the page title displays either Payment Gateway or Payment Center.

Note: The TouchNet Bill + Payment Recalculation link opens the Plan Recalculation Charges Posting Report page in the TouchNet Bill + Payment Operations Center. From that page you can research and resolve the cause of the recalculation error.

Note: For TouchNet Marketplace uPay posting errors, the link opens a page in the Marketplace Operations Center that displays the uPay posting errors. From this page you can research and resolve the cause of the error.

12.3 Viewing Sub-application Transaction Data

From the U.Commerce Dashboard Application View you can view sub-application payment transaction detail by clicking on the arrow icon to the left of the desired application. The sub-application detail displays under the application.

In the example image below the Bill + Payment application has been expanded to show the sub-application level totals.
Sub-application level reporting totals are available in the Totals, Activity, and ERP transactions received summary sections on the U.Commerce Dashboard Application View.

The U.Commerce Dashboard Application View displaying the sub-applications

### 12.4 Viewing the [ERP] Transactions Received Summary

The [ERP] Transactions Received Summary section of the Dashboard displays a summary of the transactions for your school’s ERP (Ellucian Banner, PeopleSoft, or Ellucian Colleague) and SponsorPoint student accounts. Your ERP name appears in the heading.

**Note:** To view the SponsorPoint detail, you need to have the SponsorPoint Admin role.

The Payments Received and Posted columns display a total received and a total posted to the ERP. If there is a disparity between these two amounts, the red Actions required message displays and the Actions column displays an explanation of the action needed. Click on the action link to navigate the applicable location in the Payment Center Operations Center.

The Other section displays the SponsorPoint student accounts charges and refunds received and posted along with the action needed if there is a disparity in these amounts. You can also click on the action link to navigate to the U.Commerce Central Administration page. Click the SponsorPoint Reconciliation link to display the ERP Postings.

*ERP transactions received summary section of the Dashboard*
The following table describes each of the columns in the [ERP] Transactions received summary section.

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payments section</td>
<td></td>
</tr>
<tr>
<td>Applications</td>
<td>This column lists your school’s licensed TouchNet commerce applications.</td>
</tr>
<tr>
<td>Received</td>
<td>This column lists the total payments received for the ERP. If there are actions required for the payments, click the action link in the Action column. The ERP Update Transactions page in the TouchNet Payment Gateway Operations Center displays.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> You must have either the View ERP Transaction or Manage ERP Transaction user roles to view this page in Payment Gateway. These roles are assigned by an administrator in Payment Gateway.</td>
</tr>
<tr>
<td></td>
<td>If you have the Manage ERP Transaction user role, you can use this page to retry failed or pending updates or mark them as complete if they have been resolved manually.</td>
</tr>
<tr>
<td>Posted</td>
<td>This column lists the total payments posted for the ERP. If there are actions required for the payments, click the action link in the Action column. The ERP Update Transactions page in the TouchNet Payment Gateway Operations Center displays.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> You must have either the View ERP Transaction or Manage ERP Transaction user roles to view this page in Payment Gateway. These roles are assigned by an administrator in Payment Gateway.</td>
</tr>
<tr>
<td></td>
<td>If you have the Manage ERP Transaction user role, you can use this page to retry failed or pending updates or mark them as complete if they have been resolved manually.</td>
</tr>
<tr>
<td>Action</td>
<td>The Action Charges column shows a description of the action required to resolve any payment discrepancies. Click on the action link. The ERP Update Transactions page in the TouchNet Payment Gateway Operations Center displays. You can retry or clear charges that have not posted from this page.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> You must have either the View ERP Transaction or Manage ERP Transaction user roles to view this page in Payment Gateway. These roles are assigned by an administrator in Payment Gateway.</td>
</tr>
<tr>
<td></td>
<td>If you have the Manage ERP Transaction user role, you can use this page to retry failed or pending updates or mark them as complete if they have been resolved manually.</td>
</tr>
<tr>
<td>Other ERP Transactions</td>
<td></td>
</tr>
</tbody>
</table>
### Column Description

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>The Other ERP section displays the student account charges and refunds for Bill + Payment.</td>
</tr>
<tr>
<td>Received</td>
<td>This column lists the total student account charges and refunds received for Bill + Payment.</td>
</tr>
<tr>
<td>Posted</td>
<td>This column lists the total student account charges and refunds that were posted to the student account for Bill + Payment.</td>
</tr>
<tr>
<td>Action</td>
<td>The Action column displays a View link if action is required to resolve any charges or refund discrepancies. Click the action link, to open the Bill + Payment Operations Center home page where you can review additional detail related to the charges or refunds.</td>
</tr>
</tbody>
</table>

#### 12.5 Viewing the Payment Type Batch/File Summary

The Payment Type Batch/File Summary section of the Dashboard displays any payment log failures that occurred during payment posting. Click on the link in the Action column to view the details.

#### 12.6 Downloading Data to CSV Files

You can download the payment transaction data in all of the sections on the Dashboard Application View to a comma-separated value (CSV) file. Click the download icon to download and save the desired data to a CSV file. The saved CSV files can then be opened in standard spreadsheet software.

*Download data to a CSV file using the CSV icon*
12.7 Printing Dashboard Data

The payment transaction data displayed on the Dashboard, Merchant View, and TouchNet Ready View in the individual sections (i.e., Totals, Activity, ERP transaction received summary, etc.) can be printed on your local printer.

To print the desired section transaction data, click on the Print icon located in the top right corner of each section.

<table>
<thead>
<tr>
<th>Applications</th>
<th>Count</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bill+Payment</td>
<td>119</td>
<td>154,058.04</td>
</tr>
<tr>
<td>Deposits</td>
<td>1</td>
<td>20.00</td>
</tr>
<tr>
<td>Payment Plan</td>
<td>11</td>
<td>20,186.83</td>
</tr>
<tr>
<td>Student Account</td>
<td>107</td>
<td>133,851.21</td>
</tr>
</tbody>
</table>

*Print Dashboard data using the Print icon*

The Print window displays where you can select your desired printer. Select your desired print options and click the Print button.
13.0 The Dashboard Merchant View

The Dashboard Merchant View provides easy access to merchant payment activity. It provides administrators and authorized users the ability to view settled payment transactions for all merchants they have rights to.

On the Dashboard Merchant View, you have the ability to view a summary and a comparison of merchant payment activity based on selected date range(s).

Important! The totals on the Dashboard Merchant View are compiled similar to the Tender Summary report in Payment Gateway, so the Dashboard Merchant View totals represent only settled payment transactions. Totals on the Dashboard represent all payment activity. This will result in discrepancies in the transaction counts and net amounts between the totals on the Dashboard Merchant View and the U.Commerce Dashboard.

For example, when comparing payment transactions for reconciliation purposes, the totals may be different depending on the time you are viewing the information and the time you have batches scheduled to run and settle. A payment posted at 2:00 PM will not display on the Dashboard Merchant View until the nightly batch runs and the payment is settled.

Note: To view payment transaction detail on the Dashboard Merchant View, you must have the Accountant merchant role assigned in Payment Gateway, for each of the applicable merchants (Credit Card, Debit, ACH, etc.). For additional information about the Accountant role, see the Payment Gateway User Roles section of the Payment Gateway Business User Guide.

13.1 Displaying the Dashboard Merchant View

To display the Dashboard Merchant View, follow these steps.

1. Hover the cursor over the Dashboard tab, the dropdown menu displays.

The Dashboard Merchant View link
2 Click the Merchant View link. The Dashboard Merchant View displays.

The Dashboard Merchant View page

The Dashboard Merchant View is separated into three sections.

- **View and Manage Merchants** – Displays the list of available merchants. Select the desired merchants to view the payment transaction detail. You can also save the merchant set.

- **Saved Merchant Sets** – Displays a listing of the merchant sets that you created and saved.

- **Details** – Displays a summary view and a comparison view for selected merchant sets by a selected date range(s).

### 13.2 View and Manage Merchants

From the View and Manage Merchants section you can select from a listing of available merchants to view payment activity. The merchants displayed are based on your roles and permissions set in Payment Gateway as well as your merchant configuration setup in Payment Gateway.
Selecting Available Merchants

To select a merchant from the list of available Merchants, highlight the desired merchant name and click the right arrow button or double-click on the desired merchant name. The Merchant displays in the Selected Merchants pane.

The list of Selected Merchants

Note: When the system is retrieving the desired merchant information, you will see a Status popup box indicating the information is “Loading... Please Wait”. You can cancel or reset this process by clicking on the Cancel/Reset button.

Once you have selected all the desired merchants, there are three options available,

1. View Selected – the merchants in the Selected Merchants pane display in the Details section.

2. Save Set – the merchants in the Selected Merchants pane are saved to a new or existing merchant set. You are prompted to enter a merchant set name. You can use the saved merchant set in the future to view merchant payment data.

3. Cancel – Clears the current merchants displaying in the Selected Merchants pane.
Chapter 13

Viewing Selected Merchants

If you want to view the select merchant(s) displaying in the Selected Merchants pane, click the View Selected button.

The payment transactions display in the Details section. The Summary View is the default view. The Summary view displays a Day View graphical representation, a Percentages pie chart, and Activity listing.

Note: The Start and End Date fields default to the past 30 days.
For additional information about the Summary View, see the Details section.

**Saving a Selected Merchant Set**

If you have a set of merchant payment transactions that you need to view frequently, you can use the Save Set option. For example, if you want to view all Athletic Department settled payment transactions at the end of each month, you can save the applicable merchant(s) to a merchant set titled Athletic Department. At the end of the next month when you need to view the Athletic Department transactions, you can select your Athletic Department merchant set from the Saved Merchants Sets listing. You won’t have to scroll through the list of available merchants and select it each time.

**Canceling a Selected Merchant**

The cancel option is a quick way to clear all the merchants from the Selected Merchants pane.

If you want to remove an individual merchant from the Selected Merchants pane, highlight the individual merchant and click the back arrow button.

---

13.3 Saved Merchant Sets

The Saved Merchant Sets section displays all the merchant sets that you have previously created and saved. Saved merchant sets are a convenient way to group merchants that you want to view frequently. Your most recent saved merchant set displays at the top of the Available Merchants list.

You also have the ability to reorder the merchant set list in the Available Merchants, Selected Merchants, and Saved Merchant Sets listings. You can reorder the lists by clicking on the desired merchant name and dragging and dropping it to the desired location on the list. Any changes you make to the merchant listings are saved when you close the Merchant View Dashboard. The next time you access the Merchant View Dashboard, the merchant list displays in your new, saved order.
To expand the set details to see the merchants included in the merchant set, click the arrow to the left of the merchant set name.

<table>
<thead>
<tr>
<th>Saved Merchant Sets</th>
<th>Merchants</th>
<th>Created</th>
<th>Last Modified</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test1</td>
<td>2</td>
<td>05-28-2014 08:56:16 CDT</td>
<td>05-28-2014 08:56:16 CDT</td>
<td></td>
</tr>
<tr>
<td>Test2</td>
<td>3</td>
<td>06-03-2014 14:30:21 CDT</td>
<td>06-03-2014 14:30:21 CDT</td>
<td></td>
</tr>
<tr>
<td>All Debit Card</td>
<td>5</td>
<td>06-05-2014 15:19:16 CDT</td>
<td>06-05-2014 15:19:16 CDT</td>
<td></td>
</tr>
<tr>
<td>All ACH</td>
<td>1</td>
<td>06-05-2014 15:19:16 CDT</td>
<td>06-05-2014 15:19:16 CDT</td>
<td></td>
</tr>
<tr>
<td>All Credit Card</td>
<td>8</td>
<td>06-05-2014 15:19:16 CDT</td>
<td>06-05-2014 15:19:16 CDT</td>
<td></td>
</tr>
</tbody>
</table>

**The Save Merchants Sets section**

There are several actions you can perform for saved merchant sets. You can view the details for your saved set, you can edit a saved set to add or remove a merchant, or you can delete a saved set when you no longer need it.

**The Action dropdown menu**

To view the details for a saved merchant set, click the Action button. The Action dropdown menu displays. Select the View Details option. The merchant set payment details display in the Summary View.

The Summary View is the default view. It displays a Day View graphical representation, a Percentages diagram, and an Activity listing for the payment transaction details.

**Important!** The Summary View (Day View and Percentages) displays a maximum of 7 merchants per merchant set. If there are more than 7 merchants in one merchant set, you will be able to view individual details for the first 7 merchants and the remaining merchants will display under a category heading of "Other".

**Note:** The Start and End Date fields default to the past 30 days from the current date.
To edit a saved merchant set, select the applicable merchant set and click the Edit option from the Action dropdown menu. The saved set displays in the Selected Merchants pane. From the Selected Merchants pane, perform the desired edits for the merchant set. For example, you might want to remove a merchant from the saved set. To remove the merchant, click on the applicable merchant and click the back arrow button. The selected merchant is removed from the set. Now, you can save the set again.

To delete a previously saved merchant set, select delete from the Action dropdown menu next to the set you wish to delete. Click OK to confirm that you wish to permanently remove the saved merchant set.
13.4 Details

The Details section of the Dashboard Merchant View displays the payment transaction details for your merchant set based on a date range. You can select to view the details in a Summary View or a Comparison View.

Summary View

The Summary View is the default view. It displays a Day View graphical representation, a Percentages diagram, and an Activity listing for the payment transaction details.

Note: The Start and End Date fields default to the past 30 days from the current date.

Selecting the Date Range

You can change the Start and End Date fields to customize your Summary and Comparison data. The steps to change the date range using the calendar and the quick view settings are the same as they are for the Dashboard and reports in Payment Gateway.
The Activity Section

The Activity section displays detail for the selected merchant’s payment transactions. The default view shows the following information:

- Merchant name
- Type of payment (credit card, debit, check, etc.)
- Number of payment transactions for the merchant (for the date range selected), and
- Total dollar amount for the transactions

To expand the listing to view the detail for the selected merchant, click the arrow to the left of the Merchant name. The number and dollar amount for a specific payment type displays. There may be additional levels of detail that you can expand by clicking on the arrow to the left of the payment type.

For example, if you were viewing a Credit Card merchant set and you want to see how many payment transactions were settled for each type of credit card your school accepts, you would click the arrow next to the Merchant name to expand the merchant and then click the arrow to the left of Credit Card type to expand the credit card types and display all the credit cards your school accepts.

Comparison View

The comparison view gives you the ability to select two dates ranges to compare merchant payment activity.

For example, if you wanted to compare how many credit card transactions were settled during the month of May 2013 versus May 2014, you would select May 1, 2013 in the Start Date field and May 31, 2013 in the End Date field for the first date range. You would select May 1, 2014 in the Start Date field and May 31, 2014 in the End Date field in the second date range. Once you have selected the desired date ranges, click the View button and the details display in the Comparison View.

You can also expand the payment detail by clicking the arrow to the left of your desired merchant.
## The Comparison View

### Printing Dashboard Merchant View Data

The payment transaction data displayed in the Activity section can be printed on your local printer. Click the Print icon in the right corner of the Activity section to send the payment information to your local printer. See "Printing Dashboard Data " on page 85 for more information.

### Downloading Dashboard Merchant View Data to a CSV File

You can also download the payment transaction data in the summary view and the comparison view to a comma-separated value (CSV) file. Click the Download to CSV link in the desired section to save the file. The saved CSV files can then be opened in standard spreadsheet software.

<table>
<thead>
<tr>
<th>Merchants</th>
<th>Type</th>
<th>Date Range 1 Count</th>
<th>Net amount</th>
<th>Date Range 2 Count</th>
<th>Net amount</th>
<th>Difference Count</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Athletic depart</td>
<td>Credit Card</td>
<td>1</td>
<td>24.70</td>
<td>0</td>
<td>0.00</td>
<td>-1</td>
<td>-24.70</td>
</tr>
<tr>
<td>Credit Card</td>
<td>Credit Card</td>
<td>77</td>
<td>3,019.94</td>
<td>3,210</td>
<td>16,266,873.53</td>
<td>3,179</td>
<td>16,266,870.56</td>
</tr>
<tr>
<td>Credit Card</td>
<td>Credit Card</td>
<td>64</td>
<td>1,611.74</td>
<td>2,145</td>
<td>16,266,254.21</td>
<td>3,091</td>
<td>16,266,251.22</td>
</tr>
<tr>
<td>Signature Debt</td>
<td>Signature Debt</td>
<td>2</td>
<td>404.90</td>
<td>45</td>
<td>469.22</td>
<td>15</td>
<td>60.22</td>
</tr>
<tr>
<td>MarketplaceCC</td>
<td>PayPath</td>
<td>79</td>
<td>2,560.73</td>
<td>2,560</td>
<td>13,527,935.38</td>
<td>2,489</td>
<td>13,525,346.40</td>
</tr>
<tr>
<td>PayPath</td>
<td>PayPath</td>
<td>0</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td>152</td>
<td>5,601.37</td>
<td>5,778</td>
<td>29,792,798.91</td>
<td>5,626</td>
<td>29,787,197.54</td>
</tr>
</tbody>
</table>

The Comparison View
14.0 The Dashboard TouchNet Ready Partners View

The Dashboard TouchNet Ready Partners View provides an easy to use snapshot of your TouchNet Ready Partners and their payment transaction data. This dashboard is for the TouchNet Ready Partners manager or other designated user at your school who would need access to this information. The information provided on this dashboard will assist in managing your school’s TouchNet Ready Partners and their uPay sites. From this dashboard, you can view settled payment transactions for your TouchNet Ready Partners by uPay site.

On the Dashboard TouchNet Ready Partners View, you have the ability to view summary and comparison data for your TouchNet Ready Partners based on selected date range(s).

**Important!** The totals on the Dashboard TouchNet Ready Partners View come directly from Marketplace and represent only settled payment transactions.

To view payment transaction detail on the Dashboard TouchNet Ready Partners View, you must have the View Dashboard role assigned in U.Commerce Central Administration User Management. For additional information about the View Dashboard role and other user roles, see the *Assigning User Roles and Permissions* section of the U.Commerce Central User’s Guide.

14.1 Displaying the Dashboard TouchNet Ready Partners View

To display the Dashboard TouchNet Ready Partners View, follow these steps.

1. Hover the cursor over the Dashboard tab, the dropdown menu displays.

2. Click the TouchNet Ready Partners link. The Dashboard TouchNet Ready Partners View displays.
The Dashboard TouchNet Ready Partners View

The view is separated into two sections.

- **Current Partners** – View the list of available partners, their uPay site (s), Marketplace Merchant name, and the applicable uPay site ID. You can also view any errors that occurred during payment processing.

- **Details** – Displays a summary view and a comparison view for selected TouchNet Ready Partners.

**Current Partners**

The Current Partners section displays a list of all your available TouchNet Ready Partners. This information comes from the your Marketplace application. This section includes the following information.

**Partner**

The name of the TouchNet Ready Partner.

**uPay Site Name**

The name assigned to the TouchNet Ready Partner’s uPay site. This information is configured in the Marketplace Operations Center.

**Marketplace Merchant**

The merchant name assigned in the Marketplace Operations Center.
**uPay Site ID**
The identification number for the TouchNet Ready Partner’s uPay site. This ID number is assigned in the Marketplace Operations Center.

**Errors**
If there were issues when the payments were processed, an error would be sent to Marketplace. If there are errors associated with payments for a uPay site, a dropdown arrow would display in this Errors column. To view the errors, click the dropdown area to display the errors. You can click on the error link to navigate to Marketplace to view additional detail about the error.

<table>
<thead>
<tr>
<th>uPay Site ID</th>
<th>Errors</th>
</tr>
</thead>
<tbody>
<tr>
<td>18</td>
<td>G/L Update Error</td>
</tr>
<tr>
<td>19</td>
<td>URL Posting Error</td>
</tr>
</tbody>
</table>

The payment processing errors

### 14.2 View and Manage TouchNet Ready Partner

The TouchNet Ready Partners View displays the current TouchNet Ready Partners, their Marketplace Merchant Name, and the uPay Site Name associated with that TouchNet Ready Partner. In the Current Partners section of the page you can see a listing of all your school’s TouchNet Ready Partners and their associated uPay sites, the uPay site ID number, and the Marketplace merchant that was created for the TouchNet Ready Partner.

**Note:** If a TouchNet Ready Partner has multiple uPay sites, a dropdown arrow appears to the left of the partner name in the Partner column.

**Selecting Current Partners**
To select a TouchNet Ready Partner from the list of current Partners, click the checkbox next to the desired partner name and click the View Selected button.
**Note:** When the system is retrieving the desired merchant information, you will see a Status popup box indicating the information is “Loading... Please Wait”. You can cancel or reset this process by clicking on the Cancel/Reset button.

![Status popup box](image)

The data loading status message

**Viewing Current Partners**

The partner payment transactions display in the Details section for the TouchNet Ready Partner. The Summary View is the default view. The Summary view displays a Day View graphical representation of the payment data, a Percentages pie chart, and an Activity listing.

![Summary View](image)

The Details Summary View

**Note:** The Start and End Date fields default to the past 30 days.

For additional information about the Summary View, see the Details section.
14.3 Details

The Details section of Dashboard TouchNet Ready Partners View displays the payment transaction details for your partners uPay sites based on a date range. You can select to view the details in a Summary View or a Comparison View.

Summary View

The Summary View is the default view. It displays your payment transactions details in a Day View graphical representation, a Percentages diagram, and an Activity listing.

Selecting the Date Range

You can customize the details you wish to view by changing the Start and End Date fields. This will change the Summary and Comparison views. Once you have selected the desired start and end dates, click the View button to view the desired payment data.
When viewing uPay site payment activity on the Dashboard TouchNet Partner Ready View, you can narrow or broaden the scope of the data displayed by selecting a desired date range and start time. The Start and End date and time fields are located in the Details section. The date range defaults to the past 30 days from the current date.

To filter the data displayed on the Summary or Comparison View, select the desired start date, end date, and time using one of the following options:

**Using the Calendar**

1. To select the desired start and end date, click in the Start or End Date field. The calendar displays.
   - To change the month, click the dropdown arrow and select the desired month from the menu.
   - To change the year, click the dropdown arrow for the Year field and select the desired month from the menu.
   
   or

   ▪ Click the left and right arrows keys to locate the desired month. Use the left arrow to select a previous month. Use the right arrow key to select a future month.

2. To change the time, use the hour and minute slider buttons to select the desired hour and minute.

3. When you have completed all your date and time settings, click the View button. The data for the selected date(s) and time(s) displays on the page.

4. Click the View button. The data for the selected date(s) and time displays on the Dashboard.

**Using the Quick View**

To select a default date from the quick view, follow these steps.

1. Click the dropdown arrow to the left of the Quick View button and select the desired pre-defined time from the dropdown.

2. Click the View button. The data for the selected date(s) and time(s) displays on the page.

**The Activity Section**

The Activity section displays detail for the selected partner's payment transactions. The default view shows the partner name, uPay site name, a count of the number of payment transactions for the uPay site, and the total dollar amount for the transactions.
Comparison View

The comparison view gives you the ability to select a date range to compare payment activity for the selected partner(s).

For example, if you wanted to compare payment transactions during the month of May 2013 versus May 2014, you would select May 1, 2013 in the Start Date field and May 31, 2013 in the End Date field for the first date range. You would select May 1, 2014 in the Start Date field and May 31, 2014 in the End Date field in the second date range. Once you have selected the desired date range, click the View button to display the details in the Comparison View.

14.4 Printing TouchNet Ready View Data

The data displayed in the individual sections on the TouchNet Ready View (i.e., Totals) can be printed on your local printer. Click the Print icon in the desired section to send the payment information to your local printer. See "Printing Dashboard Data" on page 85 for more information.

14.5 Downloading TouchNet Ready View Data to a CSV File

You can also download the data on the TouchNet Ready View to a comma-separated value (CSV) file. Click the Download to CSV link in the desired section to save the file. The saved CSV files can then be opened in standard spreadsheet software.
15.0 U.Commerce Central Glossary

ACH File
A batch of ACH transactions saved by Payment Gateway as a single line in the standard format in which banks receive information to process ACH payments.

CSV
Comma-separated value.

Dashboard
Provides one central, consolidated view of commerce transactions processed throughout the day at your school.

ERP
Enterprise Resource Planning. In TouchNet documents, the ERP is the school’s student system (Banner, PeopleSoft, etc.).

Host system
Refers to a school’s ERP system. A host system may also be called a “host.”

MFA
Multi-Factor Authentication is an extra layer of protection for your account login credentials and business data. MFA strengthens your TouchNet U.Commerce security by adding another verification method during login.

Operations Center
Online interface provided with Payment Gateway for all payment processing operations and reporting.

Realm
The customer number for the school. The realm is a unique 3-6 character identifier for your school. The realm name is part of the U.Commerce username. If your school has multiple locations, multiple realms can be created for each location within your multi-campus system.

Role
In the Operations Center, the designation that determines which tasks a user can perform for the merchants assigned to that user.

Single sign-on
A single username and password used to access U.Commerce Central, the Dashboard, and the licensed TouchNet commerce applications.

U.Commerce Central
The centralized location to manage your U.Commerce system operations, view commerce activity across campus, and access the U.Commerce Central help system.
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