The Basics of Marketplace – create a new store and product

There are only three steps that you need to take to get a new store created and set up with products. Complete these three steps and then you can go back later and change settings as needed.

STEP 1 - CREATE and ENABLE the Merchant and Store

***SET UP THE MERCHANT** Have an Admin in Cash Management add **the Merchant Manager** and **add the Merchant**. (A Merchant is like a Department).

*SET UP a new Store (The Merchant Manager does this)

To "Add a New Store" From the navigation bar on the left, select <your merchant name>. ("Online TEST Merchant" in this example)

Then select >> Stores. Then select >> Add New Store



You will see the following:

Marketplace Add New Store
Store Information
Store Name:
Store Manager User
To assign Store Manager to an existing Marketplace user, select user from Marketplace User.
Marketplace User:
Add New Store

Enter the store name and select the store manager from the dropdown list. (Other store managers can be added later.)

Click the "Add New Store Button"

As the system saves the store, a unique store number will be assigned to your store.

You will see the following in the left navigation bar:

Jennifer's lest Store August 2018 Store Settings General Status Management Email Messages Text Messages Single Store Store Template Setup NEW! Users Payment Methods Shipping Classes Categories Products Allowed Groups Group Payment Methods Promotions User Modifiers Tax Service Tax Account Codes Order Search

Select "Status Management" from this list. Set the store to Enable or Preview before continuing.

STEP 2 -- **CREATE A SHIPPING CLASS <REQUIRED>** You have to do this even if you will never be shipping an actual product!

Under Store Settings, select > Shipping Classes

Click button "Add Shipping Class" and enter new shipping class info.

Shipping class name (can be NONE) and something for City, State & **Zip+4**. *Zip – you MUST USE Zip+ 4 format here or it will not save. Use zeros if you do not know. Example: **36830-0000.** If you don't you will see the following error.

Once this is entered correctly, click "OK" to save. It will take you back to the "Shipping Classes" page.

Enable a Delivery Method – Put a check mark in the "Enable" column next to one of these choices. click the Save button underneath to save it.

(You do not have to fill out anything else for this, just pick something and save it! You can select NONE here. You <u>MUST HAVE this filled out</u> to create products.)

Click the "Save <shipping class name>" button underneath to save it.

Once this has been saved, you will see a red banner near the top of the page that says "Shipping Rates Updated", but you will stay on the same page.

This is normal and your store creation is now complete.

Jennifer's Test Store August 2018 Shipping Classes
A shipping class is required for product setup. Available delivery methods and tax rates are set up by the administrator.
Shipping rates updated.
Add Shipping Class

STEP 3 – CREATE A BASIC PRODUCT

Under Store Settings select >> Products

Click "Add Product". Fill in the basic information. Don't worry about getting everything perfect. It can be changed later if necessary.

Click the "Continue" button. (Boxes will pop up to tell you if you have missed anything that is required.)

This should take you to the **"Miscellaneous settings"** page. Fill out the Shipping classes and Tax settings. Click the "Continue" button.

This should take you to the **"Images"** page – These can be edited or added later. These are NOT required. Click the "Continue" button.

This should take you to the "**Options**" – This is the <u>choices</u> section. (The tee-shirt is "small, medium, large" type of thing.) If your item does not need this, leave selection at "No" and keep going. Click the "Continue" button.

This should take you to "Items for sale" – Fill out this page. Please note the following.

*Stock number is required. You can create a number for your item, or select the "Assign a Random Stock Number" button and the system will put one in for you.

AUTO FULFILL <- IMPORTANT This option can be used for any product in which the payment should take place at the time the order is submitted versus when the order is **fulfilled**. Typically, this option would be set to "YES" for products in which no shipping is involved!

If set to "NO" the payment is not taken, nor sent to Banner, until the order is **fulfilled** by someone in your department.

"FULFILLED" MEANS THAT SOMEONE IN YOUR OFFICE HAS <u>LOGGED ON TO TOUCHNET</u> and <u>completed the fulfillment process.</u>

Click the "Continue" button.

This should take you to an "Add Product" page for confirmation. This can be confusing. The section title is "Store Status", but it is really asking if you want to <u>enable the product in the store</u>. Choose "Enabled" and **click the "Confirm" Button**. (If you ever have multiple products in the store and want to take one of them out, you would choose "Disabled" here.) This setting applies to only this one product and not the entire store.

* "Store Category Assignments" page will pop up next. The default for this is "Store Home Page". Start by leaving this like it is. It can be changed later if necessary, but in most cases this will be the correct setting. Click the **"Continue"** button.

YOUR PRODUCT IS COMPLETE. If you want to add another product, click the "Back to Products" button.

Now you can see your store, review settings, review products, and make edits.