**Online Store - Product Catalogue - User’s Product Set-Up Checklist**

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|  |  | For reference:- |
| 1 | **Dept Admin User ID for Customer Info**  |  |  |
| 2 | **Contact Tel Ext and Email Address and/or Dept website url** |  |  |
| 3 | **Dept | Room No. agreed Time & Date for training purposes** |  |  |
| 4 | **Device Used for access eg. FINPC123 for PCI DSS purposes** |  |  |

Tick each step

on completion

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| 5 | **Authorised Systems Registration System request for user** |  |  |
| 6 | **Read and Agree to PCI-DSS Compliance/pc Requirements (& *only* use Online Store via a networked centrally managed pc on campus – *as named above*)**  |  |  |
| 7 | **User Training from \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |  |  |
| 8 | **Product’s Department – existing or create new Dept?** |  |  |
| 9 | *Only for new Depts* – is the Finance Code box enabled?  |  |  |
| 10 | **Product Category – existing or create new Category?** |  |  |
| 11 | *If required for menu* – **existing or create new Sub-Category?** |  |  |
| 12 | **Check User account has appropriate access level** |  |  |
| 13 | **Check User account has appropriate permissions for required Dept/Category/Sub-Category** |  |  |
| 14 | **User is a Key Contact on FinSysSup db for Store News/Info** |  |  |
|  | **Optional Extras:-** |  |  |
| 15 | ? **Email Template** **wording** sent to finance-support@york.ac.uk to create. Include customer contact email address info - attach to Product |  |  |
| 16a | ? **Delivery Charges** for UK  |  |  |
| 16b | ? **Delivery Charges** for Europe  |  |  |
| 16c | ? **Delivery Charges** for Overseas  |  |  |
| 17 | ? **Questionnaire(s)** create and attach to Product |  |  |
| 18 | **Request Finance Code on ePay** *(provide: account code / workorder / VAT status) - attach to Product* |  |  |
| 19 | **Standardised Product Code prefix** *(format is abbreviated Dept - Product Name)* |  |  |
| **20** | **Create new Product** *(or Copy an existing Product)***In Store Product Description, Code, Stock Level:-** *\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_* |  |  |
| 21 | **Complete all Product setup tabs, Finance Code/Category/Product status/Dates visible etc.** |  |  |
| 22 | **Test the products, questionnaires, emails etc by buying and refunding an item using your Dept purchase card.** |  |  |

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|  | **Set Up Tips** |  |
|  | Use 412 as a temporary Finance Code on the Product, until Agresso/ePay coding has been created |  |
|  | Where several Products are required, Create one Product and attach any Optional Extras, then Copy that Product and change the relevant details |  |
|  |  |  |
|  | *Only for new Depts* – to enable the Finance Code box - (*re: step 9 above*)Nb. if screen is setup as shown below, it’s already enabled – do not tinker!If not yet been created save Delimiter box with a . Save then refresh then add the following details Delimiter = | Code name = TRANS\_TYPE Length = 3 Display Order = 1 or 2 |  |



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|  | **Online store Product post-setup verification*** Always ensure a valid Finance Code has been saved with a new or copied product.
* Always tick the Apply VAT Worldwide box – even if VAT is not being charged.
* Always ensure items have an End Date.
* Product Codes – must begin with a 3 or 4 letter code to identify the Department to which the product belongs (i.e. PHYS Physics, ENG English, etc)
* Unlimited Stock items do not require a Stock Notification level other than the default set by the system and so do not require an email address to be supplied for stock level alerts.
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|  | Online Store Housekeeping* Once a Product is no longer required to be displayed on the Customer side of the Online Store, change Product status to Inactive.
* Any Copied Products (i.e. title on the Store is ‘Copy of…’), where no purchases have been made, should be removed from the store.
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