

# TouchBase

User Guide

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Information	Error! Bookmark not defined.



# TOUCHBASE: ADDING ITEM CATEGORIES

## **OVERVIEW**

Item Categories are an important component to TouchBase, and they are required prior to items being published online. Item Categories organize and sort items, so customers have a clear and defined experience online and it allows for easy navigation preventing one page with many items to scroll through.

When looking at Item Categories, it is important to think simply and clearly when setting them up. Remember that the customer is not going to understand much of the internal terminology you use

## **GETTING STARTED**

- 1. You must be a site manager in TouchBase to setup Item Categories.
  - a. If you are not a site manager, please see page 2

Once logged into your districts TouchBase manager web page follow these instructions:

- 1. Go to "Item Categories"
- 2. You will see the following display:

ccounts Reporting Users	Item Categories Items Customer
	Add Delete As Of Date <b>T</b>
Title	
Available Starting	
Available Ending	
Category Header Text	
One Item Per Category In	
Cart Message	
Save	
Available Ending   Category Header Text   One Item Per Category In Cart Message     Save	

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- 3. To add a new Item Category select "Add"
- 4. Once you select "Add" the following will display in the category list:



5. To change the name of any item category, highlight the item category and change the name in the Title field to the right:

InTouch Pub TRAINING SITE	olic S	Schools	
Item Categories Ite	<u>ms</u>	Customer Accounts	Reporting Users
Add Delete As Of Date AP Tests ASB Athletics Child Care New Category Parking Yearbook	T	Title Available Starting Available Ending Category Header Text	New Category         B I U A · ↔ · E = = Font Name · Real ·

Tip: Do not get overly defined on your top-tier Item Categories. Many subcategories can exist under a main Item Category.



Each Item Category has its own Category Options:



- i. Title, see step 5 above
- ii. The date this Item Category becomes visible by the customer
  - a. This will affect all sub-categories and Items within this Item Category
- iii. The date this Item Category will become non-visible by the customer
  - a. If both dates are blank (default) then the Item Category is visible now
  - b. If the start date is entered but the end date is blank, the Item Category will continue to be visible to the customers after the starting date.
  - c. If the starting date is blank but the ending date is present, the Item Category is visible now but will become non-visible according to the ending date.
- iv. Comment or Page Header viewed at the top of the Item list
- v. If checked, only one item from this Item Category may be selected for purchase
- vi. This field will overwrite all item BUY button text once an item has been selected



Once you have created several top tier Item Categories, you may need to move them; here's how:

- a) In the first image below, we created four top tier Item Categories: ASB, Athletics, Fundraiser, and Yearbook.
- b) Click and hold one of the Item Categories
- c) Drag it up or down
  - a. You will see a dotted line; this represents where the Item Category will be located
- d) If the dotted line extends all the way to the left, this will be a top tier Item Category, if the dotted line is linked to another Item Category then this Item Category will become a Sub-Category of the linked Category
- e) Do this for all Item Categories that need moving

Hera are some examples:

All Top Tier Item Categories



Sub-Categories (or nested Item Categories)



(Full Page and Half Page are sub-categories to Senior Ads which is also a sub-category to the Top Tier Category Yearbook



# TOUCHBASE: ADDING ITEMS

#### **OVERVIEW**

Adding and maintaining items is crucial to keeping an interactive and useful payment gateway for parents. Many items should be available for purchase throughout the year so parents and customers continue to come back and do business with your district - *ONLINE*.

Everything from sports and clothing, to donations and fundraisers can be posted online.

## **GETTING STARTED**

- 1. You must be a TouchBase Site Manger to add and maintain items on TouchBase
  - a. If you are not a manager in TouchBase please contact the Business Office
- 2. Log into TouchBase manager
- 3. Go to Items
- 4. Select an Item Category you wish to publish items under

<u>Item Categories</u>	<u>ltems</u>	Customer Accounts	Reporting Users	
You are here	Brimhall JH closed	16/1/2012		
Categories	ASB   Donations	Fundraisers		
Add Delete		As Of Date 🔻		
ltem #	Description		Price	Price
			Category	Category
			Description	



5. Select Add once an Item Category has been selected (*Note: The Add button will only be highlighted once an Item Category has been selected.*)

Item Categories	<u>ltems</u>	Customer Accounts	<u>Reporting Users</u>	
You are here	Brimhall JH closed	6/1/2012 / ASB		
Categories		,		
Add Delete		As Of Date 🔻		
item #	Description		Price	١٩
			Category	Са
			Description	
Note: T Item Cat	he "YouAre Her egory you are a	/ e line will identify w bout to add items u	hat nder.	

6. A listing of InTouch items for your site will appear. An Item may be listed only once and will be removed from the available item list.

Delete					
	📄 Item	s			
		Item #	Description		
		1001-ASB	ASB CARD		
		1002-YearBK	YEAR BOOK		
		2001-Fundr	School Fundraiser		
				Ok	
	1				
				des	
				des	
				ies:	) · Sit
				Any	) · Si
				jes Any Limit To Quantity Available	) · Sit

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7. Once you have selected items to publish under an Item Category, the items will be available to edit

<u>Item Categories</u>	<u>ltems</u>	Customer Account	<u>is Reporting Users</u>	
You are here	Brimhall JH closed	6/1/2012 / ASB		
Categories				
Add Delete		As Of Date 🔻		
ltem #	Description		Price	Price
1001-ASB	ASB CARD		Category	Category
1002-YearBK	YEAR BOOK		cutogory	
2001-Fundr	School Fundrai	ser	Description	
			Comment	
			Available	Starting
			Image	NO IMAGE AVAILABLE

- 8. To edit the selected item or to edit currently published items, simply highlight the item of your choice and complete the associated Item Details.
  - a. Highlight the item you wish to edit

Item Categories	<u>ltems</u>	Customer Accounts	<u>Reporting Users</u>		
You are here	Brimhall JH closed 6	6/1/2012 / ASB			
Categories					
Add Delete		As Of Date 🔻			
Item #	Description		Price	20.00	
1001-ASB	ASB CARD			ASB	
1002-YearBK	YEAR BOOK				
2001-Fundr	School Fundrais	er	Description	ASB CARD	
					1
			Comment		
		(Click the item l	line)		1
			Available	Starting	

- b. Complete the "Items Settings"
- c. Save

**Note:** Changing Item settings on TouchBase does NOT change the item settings in InTouch Terminal or Manager.

**Note:** Changes completed to either a new item or an existing item takes effect immediately and do not require a reboot or any other action by you or the customer.



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# Item Settings

Item Categories	Items	Customer Accounts Repo	rting Users		
You are here	١	Nashington High School / Student /	Activities and Back to Scho	olltems	
Categories			i		
Add Delete		As Of Date	T	$\langle \rangle$	ii
Item #		Description		Price	55.00 Variable Price
1010.1920.01		ASB Card 2019-2020	iv		
4005.1920.01.01		Yearbook		Category	Student Activities and Back to School Items
CASBYB.1920.01		Combo ASB & Fall Yearbook		Description	Yearbook
1200		Parking Pass	V		
2600.07.1		PE Lock		Comment	Disk up vonskaaks at Mar. Smith's alasseenen ofter Marsh 21
DPP		DEVICE PROTECTION PLAN		Comment	Pick up yearbooks at Mrs. Smith's classroom after March 31.
			VÌ		Note! If you have already purchased a yearbook, you will not be
					like to purchase a second yearbook.
			vii		
				Available	8/14/2019 03/31/2020 11:59:59 PM
				Image	Select Select
					Sautore
					Use Multipart Item Price Levels
					Charge Transaction Fee
	xi				Allow Purchase With Fines
					Available To Customers At Any Site
	xi				Limit To Quantity Available
					Limit Per Transaction 0
		xiii			Show Item #
					Featured
		xiv			First 3 featured items per site will be featured, so don't feature too
		xv			many!
					Allow Purchase By Grade Level
			xvi		0
					(comma delimited; 0 for all grades)
					Block purchase if customer has not purchased any vitems in item
			xvii		group v since
					optional
					then display message
					optional
					Block purchase if customer is not in customer group
			xviii		Yearbook Purchased
					then display message
					You nave already purchased a yearbook !
					Save

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- i. PRICE: TouchBase items can have a different price than items in InTouch, but by default, TouchBase will display the price as listed in InTouch Manager.
- ii. To make an Item Price VARIABLE mark this box.
- iii. CATEGORY: This will display your current Item Category. If you need to move an item to a different Item Category, simply select the drop-down box and pick the new Item Category.
- iv. DESCRIPTION: The "description" is the default "Item Description" found within InTouch Manger → Items. This is also what the customers will see in the web store, you want this to be clear and readable. Changing this description here will NOT change the Item Description in InTouch Manager → Items.
- v. COMMENT: Comments are highly recommended for use within TouchBase. This is your primary communication tool with parents and the community. This should contain any details or important information about the item they are purchasing.
  - EXAMPLE: If yearbooks are going to be available starting "June 5<sup>th</sup>, 2016", your Item Comment should have that information listed.
- vi. AVAILABLE: This is where you can set an automatic START and END date for when an item is published and unpublished from the web store. This will not override the Item Category dates.
- vii. IMAGE: Images are highly recommended for use within TouchBase to increase the aesthetic appearance of TouchBase. Even if you do not have an image of your product use something like the district logo.
- viii. USE MULTIPART ITEM PRICE LEVELS: Select for multipart items only
- ix. CHARGE A TRANSACTION FEE: This check box turns on the ability to assess the transaction fee. Transaction fees are established and managed by district office, and this flag has no control over what the fee is – simply if it will be assessed or not.
  - 1. CONSIDERATIONS:
    - a. It is required to check this box on all regular web store items.
    - b. It is uncommon to check this box on donation or fundraiser items.
- x. ALLOW PURCHASE WITH FINES: This lets you control what items you wish to restrict if a student has an outstanding fine on their account. If you wish to drive more fine payments, the recommendation would be to leave this box unchecked. When the box is not checked, the customer will see a red "Pay Fines" button rather than a blue "Buy" button. This only applies to those with outstanding fines. Fees do apply to this restriction.
- xi. AVAILABLE TO CUSTOMERS AT ANY SITE: Checking this box allows any customer type from any building or people from the community (Guest Accounts) to purchase an item. This is typically only used for items like fundraisers and donations.
- xii. LIMIT TO QUANTITY AVAILABLE: This box makes the item contingent on the "Qty." listed in InTouch Manager → Items. Once the item quantity hits "0", the item will say "Sold Out" online. The quantity is reduced on both terminal and web sales – any time that item is sold regardless of method.

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- xiii. LIMIT PER TRANSACTION: This option will control how many of 'X' product can be added to the cart and purchased.
- xiv. SHOW ITEM NUMBER: This function is primarily only used in Community Education applications. Typically, in this environment, the InTouch Item number also matches the course number/course code, thus using the Item Number over the default Item Description, creates a tie between a course catalog and the TouchBase web store.
- xv. FEATURED: This function in addition to placing this item in its designated Item Category will place this item on the main customer or Home Screen. There is only room for 3 items to be Featured.
- xvi. GRADE LEVELS: This is where you can restrict a purchase to a specific grade level.
  - 1. EXAMPLE: If you want only seniors (12<sup>th</sup> graders) to purchase a parking permit, you will enter 12 to this box. To enter multiple grade levels, you would separate the numbers with a comma (11,12).
  - NOTE: The grade level must match the same format that is being sent via your SIS

     EXAMPLE: For the Sixth Grade Camp you would enter a 06 or a 6 whichever matches your SIS.
- xvii. BLOCK PURCHASE IF CUSTOMER HAS NOT PURCHASED: This function will block the purchase of this item according to previous items purchased per the parameters set. There are four fields:
  - 1. ANY or ALL: the customer needs to have purchased ANY within the item group or ALL within the item group
  - 2. THE ITEM GROUP: Select from the dropdown the Item Group required
    - a. Contact support if you need assistance with creating an Item Group
  - 3. DATE OPTION: Enter a Date, the item(s) from this Item Group must have been purchases after the date entered.
  - 4. DISPLAY MESSAGE: This message will overwrite the BUY button of this Item until the parameters of the function have been meet.
- xviii. BLOCK PURCHASE IF CUSTOMER IS NOT IN CUSTOMER GROUP: If the person is in the Customer Group selected then they can purchase this item, if they are not in this Customer Group then they are blocked from purchasing. There are two fields
  - 1. CUSTOMER GROUP: Use the dropdown menu to select a Customer Group
  - 2. DISPLAY MESSAGE: The Message field will overwrite the BUY button of this item if the customer is blocked from purchasing.



# STAY CONNECTED!

If at any time you need assistance with TouchBase, InTouch or any InTouch product or service, please contact us. We have a great support network ready to go to work for you.

#### <u>Address</u>

InTouch Receipting Systems 4415 Pacific Highway East Fife, WA 98424

#### Phone Support

800-627-4767 Local: 253-922-6077

#### Email

support@intouchreceipting.com

Web

www.intouchreceipting.com