

## UStore Checklist

Department Name: \_\_\_\_\_

- Initial meeting to go over marketplace. Date: \_\_\_\_\_
- Ecommerce Application from new UStore site owner
- Ecommerce Departmental Agreement on File from new UStore site owner
- Make a Folder for the site, use the Department Code on the Tabs.
- Must have account number to charge fees to: \_\_\_\_\_
- Create 1 **shared** training ID and password for department in MarketPlace Test. (Comptroller's Office.  
  
Once created add roles to the user and add the merchant so test site can be created. (UStore owner)
- Test store is developed by UStore site owner
- UStore site owner must test payments thru test site. Get confirmation from UStore site owner they test correctly.
- Get merchant ID (MID) V/MC, DISC, AMEX from Bank Accountant to assign to store
- Send email to set up Payment Gateway for MID's (C Holzheuser, J Barrios, B Torres)
- Submit Touchnet Marketplace Access form for each user along with Train Traq Transcript (required) showing proof PCI Compliance Training for signature by Comptroller.
- Set up user(s) in Production(Comptroller's Office) once signed forms received from Comptroller
- Notify Train Traq (Rosie Ruiz) to assign users PCI annually
- Wait for confirmation from Bursar that Payment Gateway has been set up
- Create userid(s) and password(s) in MarketPlace Production. Link users &/or merchants (Comptroller's Office)
- Production store can be developed by UStore site owner
- Set new site to "ONLINE" in Marketplace Production
- Test payments and refunds through production UStore. Confirm tests post correctly in FAMIS and clear the bank.
- Go Live.
- PCI Questionnaire on file (Comptroller's Office - due by June of each year)