Augusoft®

Lumens Merchandise

Optional (Professional or higher license required)

Contents

Merchandise Program Overview
Introduction

Merchandise is a Lumens feature available to provide the opportunity to sell items in conjunction with selling Classes. While Augusoft will provide training on the functionality of the feature, we do not provide training on the business of selling tangible goods.

The benefits are:
- New business line for your organization
- Sell Items independently
- Sell Items attached to a Class
- All Online through Lumens

Lumens Merchandise is a feature which allows the sale of non-class items. These items may be class supplies/materials, parking passes, books, clothing, transcripts, meals associated with classes or trips, and more. Merchandise items can be sold in conjunction with a class or as standalone items. The merchandise items may have attributes (for example: size, color, menu, etc.) with different prices based upon the attributes assigned. There are four delivery options that will be available: shipping (with a flat rates or real-time rates from the carriers), classroom delivery, pick-up, and electronic delivery.

Lumens Merchandise is included in Lumens Professional (PRO) license. Sites with Lumens PRO or higher can activate Lumens Merchandise if interested. If you do not have a minimum a Lumens PRO license (Lumens Standard or Lumens Collective), you may request for Lumens Merchandise to be activated in your Staging site to evaluate and decide if you want to consider an upgrade to Lumens PRO.

Merchandise Program Overview
Introduction - Icons

There are several icons used in the manuals. Each icon has a visual value:

I Wish Lumens Could… Lumens thrives on user feedback to influence new features and updates – indicates an area where you may be able to think about what else Lumens can do for your program.

Information indicates informational items, things to consider as you set up your site, tips based on best practices or common practices of other Lumens customers.

Retention Activity indicates something to be done after or outside of the training.

Questions indicates questions for review and also to frame thought about the way you will setup your site.

Ripple Effect indicates the importance of understanding the information as well as how it impacts other areas that well be downstream or dependent on the setup.

Try It! Is a suggested place in your training to stop and practice what you are learning.

Additional Reference indicates a process not formally addressed in the workbook. Additional resources will be indicated, such as a QRA (Quick Reference Aid or resource indicated, outside this training).

Knowledge Check is at the end of a section, designed to review new content.

Merchandise Set Up and Preparation
System Options

Objectives for Merchandise Set Up and Preparation:
- Review accounting code needs
- Define shipping and delivery options
- Create attributes, items, and delivery requirements for merchandise
- Identify if items are added to Courses, Classes, or sold individually

*System Options > **Financial Policies***

Activate accounting codes if needed (and require them if applicable) for merchandise and shipping charges.

Questions:
Will you need to separate accounting codes for shipping charges?
Will you need to track merchandise using accounting codes?
What will they be? Write down the type you need.
_____
_____

Merchandise Set Up and Preparation
System Options - Continued

*System Options > **Power User***

> **Merchandise Display Settings**
>
> **Merchandise Return Policy Management**
>
> **Merchandise Settings**

Power Users: System Settings: Edit Merchandise Display Settings

Merchandise Display Settings: First Line   **Second Line**

Item Name ▼	Item Description ▼
Item SKU ▼	None ▼
Item Price ▼	None ▼
None ▼	None ▼

Merchandise Display Settings: Third Line (Staff Only)

| Quantity Available ▼ |
| Available To Students ▼ |
| Taxable? ▼ |
| None ▼ |

Submit   Cancel

These settings are similar to the Class Listing Display Settings. You can control what displays to the Students.

Power Users: System Settings: Edit Merchandise Return Policy
* denotes required fields

Return policy name *	Standard Merchandise Returns
Default refund method *	Refund to credit card ▼
2nd default refund method *	Electronic voucher ▼
Return processing fee method *	Flat Rate ▼
Return processing fee rate or amount*	3.00
	Use '12.5' to enter 12.5%
Require return policy acknowledgement *	⦿ Yes ○ No
Charge processing fee on non delivered items *	⦿ Yes ○ No
Edit Return Policy Text *	

These settings are similar to the Class refund policy set up. You can create multiple policies.

Return Processing Fee Method and Amount allows the option to charge for returns.

Charge processing fee on non-delivered items allows staff to charge a fee.

If the default refund method is credit card, a second default method is available in case this was not the original payment method.

Merchandise Set Up and Preparation
System Options - Continued

Power Users: System Settings: Edit Merchandise Settings

'Merchandise' displays as *	Merchandise
Sales Tax for Merchandise	◉ Yes ○ No
Merchandise Sales Tax Rate *	3.5
	Use '12.5' to enter 12.5%
Merchandise Measurement Type *	Imperial
Delivery Type(s) Available *	Classroom Delivery / Email\Download / Pick-Up / Ship
e-distribution to student at transaction completion?	◉ Yes ○ No
Pick Up Locations	◉ Multiple ○ Single
	St Wenceslaus Church / Excelsior Middle School / Liz's Wellness Spa / Center Point Ambulance / Lisbon Mt. Vernon Ambulance Service

Shipping

Flat Rate	+
United States Postal Service	+
FedEx	+
United Parcel Service	+

Use Min./Max. values for Merchandise? *	◉ Yes ○ No
Minimum Quantity *	1
Maximum Quantity *	1

Submit   Cancel

Name can be modified.

Choose Sales tax and list.

Set applicable delivery options.

Pick Up Locations allow a single or multiple location available for selection.

See next page on shipping.

Min/Max allows you to choose if there is a minimum or maximum quantity when requesting merchandise.

If the Power User setting is set to use minimum and maximum values and required w/ registration items is chosen, the Minimum Value and Maximum Value boxes will display. If set to No, those fields are not available.

Example of screen display if minimum and maximum is active allowing these fields to be edited. Minimum and maximums are available when associating an item to a class.

Required w/ Registration?	Set Price to $0 w/ Class?	Minimum Value	Maximum Value
UnSelect All	Select All		
☑	☐	1	2
☑	☑	1	1

Merchandise Set Up and Preparation
System Options - Continued

For Delivery Type(s) Available to display, configuration must include shipping.

- **Email / Download:** Indicates the Student download this item after they pay. If yes, this will trigger delivery and prompt Student to download item immediately after purchase. If no, staff will need to ensure delivery at a later date.
- **Pick Up Locations:** Identify single or multiple pick up locations and choose locations (defaulted from pre-defined list).
- **Ship:** Rates may be determined by a flat rate or use real-time rates for their selected carriers (options are USPS (US only), Canada Post (Canada only), FedEx, and UPS).

Shipping options are a Flat Rate or from a selectable service.

Flat Rate is used if you charge a single rate for all shipping. Amount is the amount of the flat rate shipping charge.

Carriers available:
- FedEx
- United Parcel Service (UPS) (US Only)
- Canada Post *(Canada Only)*
- United States Postal Service (USPS) – *US Only*

Available carriers have settings for their specific API / account information - these fields may vary by carrier. Customers create API accounts for the carriers for which they want to use real-time rates.

System Options > Site Configuration > Menus > **Build Public Menu Structures**

Determine if the merchandise option will display on your applicable menus.

System Options > **Template Management**

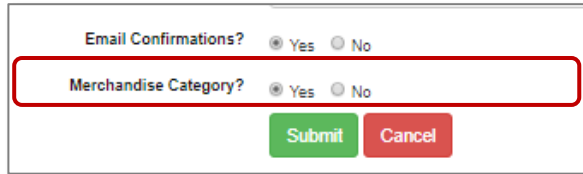| **Web Page Templates** (several additional email/web templates are available)	
Merchandise Headers	Comparable to Course Header template
Merchandise page footer	Comparable to Course Footer template
Merchandise list	Displays on Subcategory page
Select Merchandise for Class	Appears when Students / staff select merchandise with a Class
Select Options for Merchandise	Message students / staff of purchase made independent of a Class
Email Templates	
Learner Class & Merchandise Confirmation	
Learner Class & Merchandise Confirm – Open Ended Class	
Learner Merchandise Confirm	
Send Merchandise to a Friend	Similar to Send to a Friend template, sends to a defined email
Electronic Merchandise Distribution	Displays if email / download delivery is selected (power user setting). Will send with a file attachment or a URL.
Merchandise Shipped Notification	When items are updated to Shipped in Lumens, email is sent to notify the purchaser shipping has begun.

Retention Activity:

Review each web and email template. Make updates and test the results. View the applicable web pages and create test environments to generate emails.

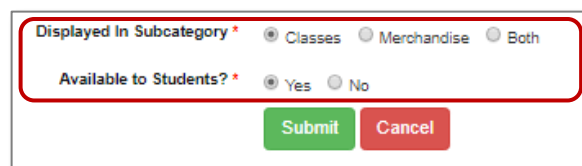# Merchandise Set Up and Preparation
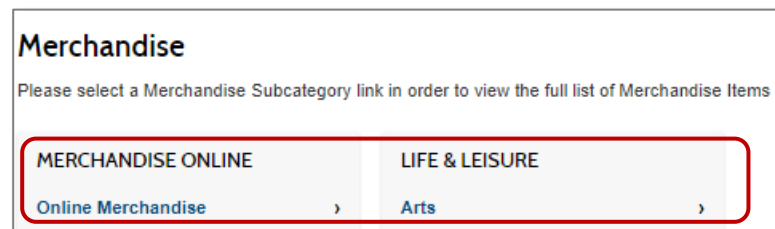## Course Management

Course Mgmt > ***Categories***

Merchandise Category controls if the Category will appear as an option on the Merchandise Item add / edit view.

Displayed in Subcategories: Controls what displays in the Subcategory (for example: Classes, merchandise or both).

Available to Students: Controls if the Subcategory is shown or hidden from Students.

Information:
Staff can choose to have Classes and merchandise items intermingled, but the categories must have Merchandise Category selected to Yes in order to assign Merchandise to the Class.

Ripple Effect:
Staff can choose to have Classes and merchandise items intermingled, but the categories must be set to Merchandise Category to Yes in order to assign Merchandise to it.

Merchandise Set Up and Preparation
Merchandise Attributes

Begin creating attributes (we recommend creating a master list of attributes), create the items, set delivery options, and then assign attributes accordingly (documenting the quantity).

Create Attributes	Create Merchandise Items	Set Delivery Options	Assign Attributes	Enter Quantity
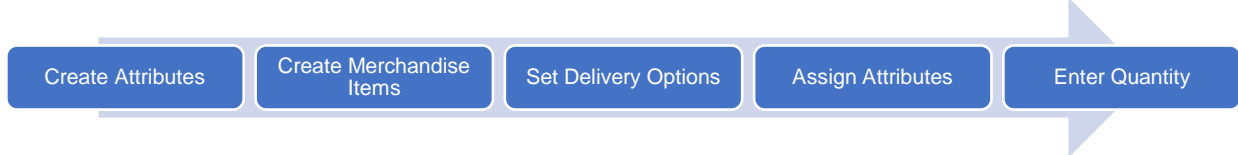
Attributes: Qualities of a particular item that may be different based upon different versions of the item (for example: sizes, colors, gender, dietary restrictions, and hardcover vs. paperback)
Item Management: (Mgmt) is where you will add and manage each item in your database
Delivery: Management page will allow you to search, view and track your items.

Merchandise > Attributes

Merchandise Attributes
Search for Merchandise attributes using the search field below:

Add New Attribute

Search: _____

Action	Attribute Name		Sort Order		Status	

Add Merchandise Attribute
* denotes required information

Attribute name * _____
Description * _____
Sort Order * _____

If you do not want a value to be available for selection, uncheck the checkbox in the Display column. The unselected value will not display to the Student or Staff Member.

Option Name	Option Value	Sort Order	Default?	Display
	001		○	☐
	002		○	☐
	003		○	☐
	004		○	☐
	005		○	☐

Submit   Add Additional Rows   Cancel

Create your list of item attributes. For example:
- Sizes
- Colors
- Permit
- Books

Sort order must be unique.

Additional rows can be added if necessary.

These become the drop-down for items you will create. Once created, can be edited, inactivated, and deleted (if never used).

Merchandise Set Up and Preparation
Merchandise Item Mgmt

All items sold are added manually to your Lumens site.

*Merchandise > **Item Mgmt***

Manage Merchandise Items

Search for Merchandise Item(s) using the search fields below:

Item Name		Item SKU	
Category			
Status			

Search   Reset

Add New Item

Add Merchandise Item
* denotes required information

Expand all | Collapse all

General   —

Item SKU is the Part number.

Student Display Date <u>must</u> be earlier than Student Purchase Start Date.

Item Expires, select Yes if item should no longer display and be available for purchase as of a specific date (for example: parking permit).

Item Name *

Item SKU *

Category *

Subcategory *

Alternate Subcategories (optional, for display only)
0 selected

Click here to remove selections
Life & Leisure : Arts
Life & Leisure : Culinary
Life & Leisure : Dance
Life & Leisure : Fitness

Add Description *

Student Display Start Date *

Student Purchase Start Date *

Staff Display Start Date *

Staff Purchase Start Date *

Item Expires *   Yes ◯ No ⦿

Accounting code *

Add Graphic ⬆
Recommend approx. 350x150, jpg, gif, png file format, max 50KB

Add Listing Icon ⬆
Recommend approx. 15x15, png file format, max 30KB

Listing Icon Alt Descr.

☐ Save as Draft

Continue   Reset   Cancel

Merchandise Set Up and Preparation
Merchandise Item Mgmt - Continued

Edit Merchandise Item

* denotes required information

Expand all | Collapse all

| General | + |
| Delivery & Attributes | − |

Available to Students? * ○ Yes ● No

Available with Course/Class * ○ Yes ● No

Delivery Option(s) *
Classroom Delivery
Email/Download
Pick-up
Ship

Return Policy * [▼]

Use Merchandise Attributes * ○ Yes ● No

Price * [0.00]

Cost * [0.00]

Taxable * ○ Yes ● No

Quantity On-Hand   0

Quantity Available   0

Available to Students?: Indicates whether Students can make purchases.

Available with Course/Class: will it be associated with a Course / Class or independently sold?

Delivery Option(s): Different fields will display based on choices selected.

Delivery Options
- **Classroom Delivery:** Items will be available in the classroom
- **Email / Download:** file upload view will display
  - If delivery option is email/download a file type and URL field will appear.
- **Pick-up:** cities and location view will display
- **Ship:** Dimensions and weight view will display
  - If delivery option is ship, dimension value options will display (length, width, height, and weight)

Use Merchandise Attributes
- Selecting No will prompt input for Quantity Available and Re-Order Quantity.
- Selecting Yes will prompt the Attributes field to appear for selection.
- Attribute Price / Cost, if Merchandise Attributes are set to No, all merchandise items will have the same prices/cost
- Attribute Price / Cost, if Merchandise Attributes are set to Yes, price / cost fields on the Delivery and Attribute tab will default price and cost (can be changed on Quantity Tab).

Ripple Effect:

If multiple items are in a cart for the same address, they will be considered one package. Lumens will sum the weight of the items. For package size, it will use the sum of the length and width values and the largest height value.

Action: Add or Subtract.

Reason: Drop down is based on action choice.

Quantity On-Hand: Quantity of merchandise in stock. This begins with current quantity and automatically adds or subtracts by amount in quantity field.

Quantity Available (not displayed): Quantity On-Hand minus items purchased but not delivered. This field must be greater than "0" to be visible in Catalog!

Re-Order Quantity: When Quantity On-Hand is less than or equal to the Quantity Available, the merchandise item will show up on a report for re-ordering purposes.

When a Merchandise Item is purchased, the quantity on-hand does <u>not</u> change unless item has been marked as Delivered.

Information:
Staff need to set the Re-Order Quantity so they do not run out of the merchandise item on hand. (for example: if it takes 5 days to get the books from the publisher, then the Re-Order Quantity needs to be set for 5 days-worth of the item so they do not run out.)
Once a Merchandise item reaches a Quantity On-Hand of zero, then it is no longer available for purchase. Lumens does not process back orders of merchandise items.

Merchandise Set Up and Preparation
Assigning Items - Course or Class

Items can be associated with a Course or Class or can be sold individually.

- Associate item with a <u>Course</u> when item(s) will always be paired with the Course/Class. The item is integral to the experience or curriculum. Ideally offered repeatedly.
- Associate item with a <u>Class</u> when item(s) are timely or seasonal (specific syllabus) that is only applicable to a specific session.

*Merchandise > **Item Mgmt** (Courses)*

Locate item.

Choose Course(s) from drop-down.

Add to Course (applicable Courses)

Required with Registration (if applicable)

Set Price to $0 with Course? If cost of item is bundled with Class price.

Add Item to Course or to Course and Class (if you want added to existing active Classes).

Set price to $0 with Course?
- Checking this box sets the price to $0 when the item is purchased with Class.
- Do not check if merchandise item is to be distinct and separate from the Course.
- If the item is required, we recommend check Set Price to $0 w / Course as it will increase the likelihood the Student will purchase the item rather than getting it elsewhere.

Once you add the item to the Course or Course and Class a confirmation screen will appear.
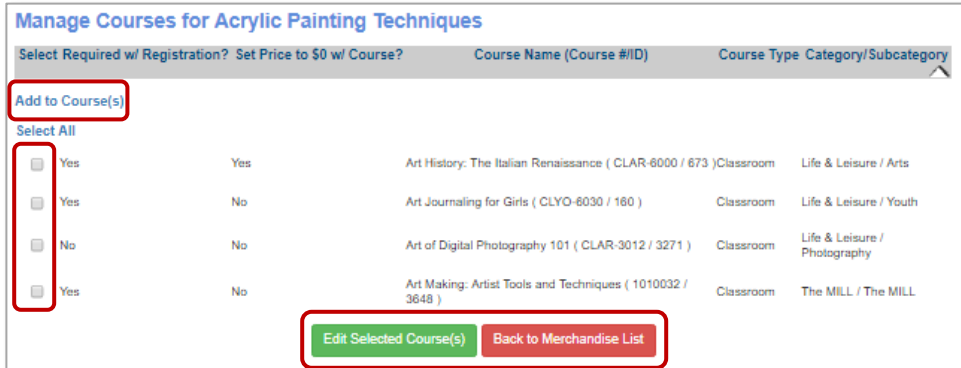
This screen displays your choices. You can return to the Merchandise List, edit selected items, or add an additional Course if you see you missed one. Edit will allow you to remove or modify the field values initially chosen. If edit is chosen, and update button will appear.

These merchadise options are now availble to all Classes created from this Course.

You can also add or edit merchandise directly from the *Course Mgmt > Course Classes > Course Name* select from the drop-down menu.
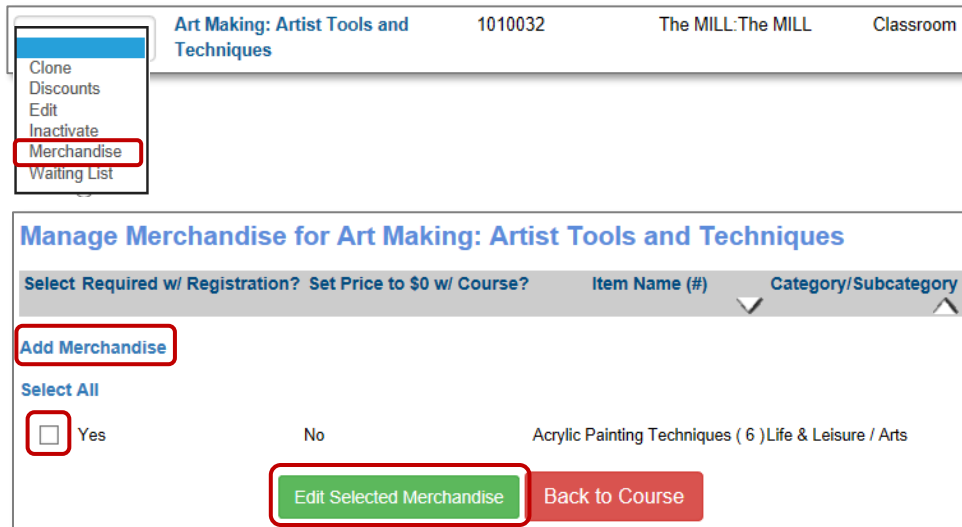
If you choose Add merchandise, only merchandise items which are not already associated with the Course appear in the search results.

Merchandise Set Up and Preparation
Assigning Items - Course or Class - Continued

*Merchandise > **Item Mgmt** (Classes)*

Locate item.

Choose *Class(es)* from the drop-down.

Click *Add to Class(es).*

Use search to identify the applicable Classes to add the item.

Options are the same as adding to a Course except to can also add minimum and maximum values. This only displays if Minimum and Maximum Values are activated at the Power User settings.

Merchandise Set Up and Preparation
Assigning Items - Course or Class - Continued

After clicking *Add to Class(es)* you will receive a confirmation screen which functions the same way as the one previously described upon under Adding Merchandise Items to Course(s).

Manage Classes for Class Syllabus

Select	Required w/ Registration?	Set Price to $0 w/ Class?	Minimum Value	Maximum Value	Class Name (Course #/ID)	Course Type	Category/Subcategory
Add to Class(es)							
Select All							
☐	Yes	Yes	1	1	#1 Excel(KTCO-3010e /27280)	Classroom	Business & Professional Development/Professional Development
☐	Yes	No	1	1	#1 Excel(KTCO-3010e /27583)	Classroom	Business & Professional Development/Professional Development

[Edit Selected Class(es)] [Back to Merchandise List]

You can also add or edit merchandise directly from the *Course Mgmt > Course Classes > Course Name > **Class list**.* Select the Class from the drop-down menu.

Classes
Course: #1 Excel [KTCO-3010e]

Choose *Merchandise.*

Select	Class Name (ID)	Start Date	Remaining Seats
**Add	Back to Course List**			
○	#1 Excel (27280) (Section 123456)	01/01/2018	95

Clone
Discounts
Edit
Manage Delivery
Merchandise
Roster

Manage Merchandise for #1 Excel(123456/27280)

From this view you can add or modify selected merchandise.

Select	Required w/ Registration?	Set Price to $0 w/ Class?	Minimum Value	Maximum Value	Item Name (SKU)	Category/Subcategory
Add Merchandise						
Select All						
☐	Yes	Yes	1	1	Class Syllabus(MAT-1001)	Merchandise Online/Online Merchandise
☐	Yes	No	0	0	Excel for all(45-A-E2018)	Computer Technology/Office Productivity

[Edit Selected Merchandise] [Go to Course List] [Go to Class List]

If you choose Add Merchandise, only merchandise items which are not already associated with the Class appear in the search results.

Merchandise Set Up and Preparation

Assigning Items - Independent Sales

*Merchandise > **Item Mgmt*** (Individual Items – no association with Course or Class)

For example: parking pass.

Add required and or optional details.

Click Continue to create Delivery and Attributes.

Deciding your Category / Subcategory defines where to locate applicable reports for tracking and delivery management.

Merchandise Set Up and Preparation
Assigning Items - Independent Sales - Continued

Edit Merchandise Item

* denotes required information

Expand all | Collapse all

General +

Delivery & Attributes −

Available to Students? *	○ Yes ● No
Available with Course/Class *	○ Yes ● No
Delivery Option(s) *	Classroom Delivery Email/Download Pick-up Ship
Return Policy *	⌄
Use Merchandise Attributes *	○ Yes ● No
Price *	0.00
Cost *	0.00
Taxable *	○ Yes ● No
Quantity On-Hand	0
Quantity Available	0

Quantity −

Action *	⌄
Quantity *	
Reason *	⌄
Re-Order Point *	

Show [12 ⌄] entries   Search: [　　]

Quantity On-Hand	Re-Order Point	Price	Cost
	no records found		

Showing 0 to 0 of 0 entries   First Prev Next Last

[Submit] [Reset] [Cancel]

Parking Pass

Item SKU: P1000

Price: $50.00

Parking Pass for 2018-19 school year

Quantity: 500

Non-Taxable

Available to Students: Yes

ADD TO CART　　　»

School Logo Bandana

Item SKU: 010101

Price: $5.00

School Logo Bandanas

Quantity: 491

Non-Taxable

Available to Students: Yes

ADD TO CART　　　»

School Logo Tank Top

Item SKU: 12345

Price: $20.00

School Logo Tank Top

Quantity: 1223

Non-Taxable

Available to Students: Yes

ADD TO CART　　　»

For items not associated with a Course or Class, choose No for Available with Course / Class.

Identify the delivery method and attributes applicable to the item (T-shirt may need attributes such as size).

Add applicable quantities.

Click *Submit*.

Items will display under the Category defined.

Merchandise Set Up and Preparation

Assigning Items - Course Series or Certificate

*Course Mgmt > **Course Series***

Merchandise is associated with a Course Series at the Series Group level.

Select *View* for the Course series to which you want to associate Merchandise.

Select *Edit* for the Course Series group.

Set Use Merchandise? to Yes and Click *Submit.*

For the Course series group, select *Merchandise* from the Action drop-down menu.

Click the *Add Merchandise* link to associate items with the Course series group. The process of adding items is the same as adding items to a Course.

Add applicable merchandise, indicate if required and Price to $0.00 with registration.

Addition of merchandise is the same as previously indicated.

Course Mgmt > ***Certificates***

Add or Edit a certificate (located at the certificate registration section).

Use Merchandise? *	○ Yes - Class level ○ Yes - Certificate level ⦿ No
Submit Manage Courses Manage Elective Groups Cancel	

- **Yes – Class level:** Use merchandise associations that is added at the Class level.

- **Yes – Certificate level:** Add merchandise at the certificate level (can be added the same as a Course of Class association) and will ignore existing associations at the Class level.

- **No (default):** No merchandise will be associated with the certificate at any level.

Merchandise items may be associated at the Certificate level or the certificate can use the existing merchandise item associations with the Classes which are part of the certificate.

Certificate Level
- Registrations must be completed in a single transaction.
- Lumens will ignore any merchandise item associations at the Class level and only display those items associated with the certificate.

Class Level
- Registrations do not have to be complete in a single transaction.
- Lumens will display the merchandise items for purchase based upon their Course / Class level associations.

Information:
If an item is associated and required with more than one Course / Class in the certificate, the Student will be required to purchase the item multiple times.

Merchandise Buyers Experience

Purchase Individual Merchandise Item

Objectives for Merchandise Buyer's Experience:

- Complete purchase of an individual merchandise item
- Review merchandise dashboard view
- Register for a Class that includes a merchandise item

Locate Merchandise.

Click *Add to Cart.*

Delivery Type is defined based on what was added to the item, click *Continue Checkout.*

Merchandise Buyers Experience
Purchase Individual Merchandise Item - Continued

Shopping Cart

Now that you have added your class(es) to the shopping cart, **to finalize check out you must agree to the refund policy**. If you have any questions about your registration, please email nobody@augusoft.edu or call 612-331-8301. Have a great class!

Student Details	Class Details	Amount
Student, Terri terri.merrill@augusoft.net 100 Wayzata Blvd Golden Valley, MN 55426	Parking Pass Qty = 1; Email/Download;	☑ Agree to Return Policy Remove Item
	Item Price	$50.00

Total	
Total	**$50.00**

Discounts and Checkout

Update your site by replacing this text with your own message.

[   ]

Apply Gift Code

Checkout | Donate | Clear Cart | Choose Additional Classes

Item checkout is consistent with Class checkout options.

Return policy was identified at Item Mgmt.

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	my dashboard	my profile	current registrations	my transcript	my transactions	merchandise

my waiting list

Select	Item Name(ID)	Purchase Date (TranID) / Class Name(ID)	Quantity	Delivery Type	Delivery Status
Action ▾	Parking Pass () (24)	5/29/2018 (69961)	1	Email\Download	Emailed/Downloaded -- 5/29/2018; Super Admin
Action ▾	School Logo Tank Top (L) (13)	5/22/2018 (69957)	1	Pick-Up	Picked-up- 5/22/2018; Super Admin
Action ▾	School Logo Tank Top (S) (13)	5/17/2018 (69954)	1	Pick-Up	Not Picked-up

Previous | 1 | Next

The Student display of merchandise shows the delivery type and the delivery status. Delivery status is updated by staff (with the exception of email – indication of when it was downloaded appears).

Merchandise Buyers Experience
Purchase Class with Merchandise

Locate Class and click, *Add to Cart.*

When a Class includes merchandise, the information about the merchandise is posted below the schedule.

Merchandise details will display including SKU# and price. If the item has been set to $0 for registrations, then it will display as $0.00. All the details are defined when attributes are created and the item is associated with the Class.

Merchandise Buyers Experience
Purchase Class with Merchandise - Continued

Select Merchandise Items for Art of Digital Photography 101

Art of Digital Photography 101 has a few items that you may purchase as a part of this class registration. Please select those that you wish to add to your shopping cart. Art of Digital Photography 101 will be added to your Shopping Cart after you select the 'Add to Cart' button * - Price may change due to actual item selected

Quantity	Item Name	Price
1	Editing Software	$49.00
1	Syllabus Digital Photography (Set Price to $0.00)	$0.00

	Total	$49.00
	Discount Applied	($0.00)
	Total After Discount	$49.00

[Add to Cart] [Back To Classes]

Define the quantity of the merchandise. The class is not in the cart until this step is completed.

Click, *Add to Cart.*

Delivery Type Information

Please complete the following form with information about how and where you would like your merchandise delivered

Delivery Types are as follows:
Class room Delivery - This item(s) will be delivered at the first class meeting. No further action required.
Email/Download - The items will either be emailed to you or you will sent a URL where you can retrieve the information related to this item.
Ship - This item will be shipped to you via the selected carrier and method. Additional costs may apply

Merchandise Item	Delivery Type	Delivery Information
Editing Software (LL-DP-01) ID:16 Qty-1;	Classroom Delivery	
Syllabus Digital Photography (090909) ID:3 Qty-1;	Email/Download	

[Continue Checkout] [Continue Shopping]

Identify the delivery type. If more than one method was made available in attributes, those methods will display.

Select *Continue Checkout.*

Select Shipping Address

Package #1

Contents	Water Colour Paint (WC)
Select Address	⦿ Ghalia Aamer
	7550 Speaker Way NW
	Edmonton, AB T6R0P1
	Canada
	Phone number : 780-974-6481

[Edit Address]

[Calculate Shipping]

Shipping address will display (is editable)

Calculate shipping
- Lumens will calculate shipping for each carrier method available.
- Select shipping carrier

Select Shipping Carrier

7550 Speaker Way NW Edmonton, AB, T6R0P1 CA

Flat Rate
○ $5.00 FLATRATE

Canada Post
○ $23.80 Priority
○ $10.88 Regular Parcel
○ $12.56 Xpresspost

FedEx
○ $32.33 FEDEX_2_DAY
○ $13.86 FEDEX_GROUND

United Parcel Service
○ $18.67 UPS Standard

[Continue Checkout]

Complete checkout like any Student transaction.

Merchandise Buyers Experience
Purchase Class with Merchandise - Continued

Student View after checkout

Current registration view is the same as any other registration.

Merchandise view will display all purchasing details including quantity and delivery type.

<u>Ripple Effect:</u>
The Merchandise tab name is based on the name defined in *System Options > Power User > **Merchandise Settings***

Merchandise Staff Management and Maintenance
Purchase

Objectives for Merchandise Staff Experience:
- Review the staff purchase process in Lumens
- Discuss the delivery tracking options
- Process a return of merchandise
- Identify the applicable reports to manage merchandise tracking

Student > **Student Management** *(merchandise only)*

Locate Student and choose *Purchase.*

Locate the purchase item.

Click, *Add to Cart.*

Update any item details (if applicable).

Then click *Add to Cart.*

Merchandise Staff Management and Maintenance
Purchase - Continued

Delivery Type Information
Please complete the following form with information about how and where you would like your merchandise delivered

Delivery Types are as follows:
Pick-up - You must go to the selected location, with proof of purchase, to pick up this item.

Merchandise Item	Delivery Type	Delivery Information
School Logo Tank Top (12345) ID:13 Qty-1;	Pick-up	Pick-Up City*: Minneapolis Location*: aaCollegeBookStr

Continue Checkout   **Continue Shopping**

Choose Delivery Type.

Complete checkout, payment processing is the same.

Home: Cart: Payment Process

Your transaction has been processed successfully.

Transaction Completed for Terri Student | Done
Register | Current Registrations | TranHistory

Add memo text to this transaction

Display printable receipt

Print Merchandise Confirmation

Back to Students screen

Merchandise Pick-Up

Quantity Picked Up	Quantity Purchased	Item Name
0	1	School Logo Tank Top(12345); Sizes=L;
	Comments	

Submit   **Reset**

Document merchandise Pick up if applicable.

If the person is purchasing the item in person and Pick-Up is a delivery method, please select this method. The staff user can immediately update the delivery status to Delivered. This directly impacts your inventory on hand, therefore it is an extremely important action.

Processing a registration with merchandise is managed very similar to the student process.

*Merchandise > **Delivery***

This allows management for <u>all</u> delivery status' of items from your Merchandise Feature.

Only the Group By and Delivery Status are required fields. Other fields are optional but will narrow your search.

Carrier & Delivery Status: Items & shipping carrier will have their own grouping.
Class & Delivery Status: Classes & delivery type are grouped together.
Items & Delivery Status: Every unique set of an item and delivery type will have its own grouping.
Student & Delivery Status: Student & delivery type are grouped together.

Delivery Status allows staff to filter out items that have or have not been delivered.

Manage Delivery attributes of Merchandise

Manage Delivery attributes of Merchandise Items - Results

Select a group of Merchandise Items or a single Merchandise Item to update the Delivery Status.
The merchandise items below are the results of the following search fields:

Group By = Carrier & Delivery Status   **Delivery Status =** Not Picked-up

Select Group	Select Single	Student Name (ID)/ Class (ID)	Purchase Date: TranID/ Item	Quantity	Delivery Type/ Carrier Service	Delivery Status
Edit Delivery Type / Change Status (dropdown)	Edit Delivery Type / Change Status	Student Terri(55198) / N/A	5/17/2018: 69954/School Logo Tank Top (13) -S	1	Pick-Up	Not Picked-up
○	○	Webb Tracy(55182) / N/A	12/1/2017: 69889/School Logo Bandana(2) -Black	1	Pick-Up	Not Picked-up
○	○	Webb Tracy(55182) / N/A	12/1/2017: 69889/School Logo Bandana(2) -Grey	1	Pick-Up	Not Picked-up
○	○	Webb Tracy(55182) / N/A	12/1/2017: 69889/School Logo Bandana(2) -Red	1	Pick-Up	Not Picked-up

Back

Delivery status is based on search criteria.

Options are:
- Edit Delivery
- Change Status

Select Group: Updates all items within the group.

Select Single: Updates the one-line result.

Edit Delivery Type: Choose applicable method.

Click *Submit.*

Edit Delivery Type of Merchandise Items

Select one or more merchandise item(s) to change the Delivery Type.
The merchandise items below are the results of the following search fields:

Group By = Carrier & Delivery Status   **Delivery Status =** Not Delivered to Classroom

Change Delivery Type	Student Name (ID)/ Class (ID)	Purchase Date: TranID/ Item	Quantity	Delivery Type/ Carrier Service	Delivery Status
☑	Aalright Barney(55134) / N/A	4/11/2018: 69934/Acrylic Painting Techniques(6)	1	Classroom Delivery	Not Delivered to Classroom

Change Delivery Type for the selected item(s) above to the following:

Delivery Type	Delivery Information
(dropdown)	

Submit   Back

Edit delivery method will offer alternate methods based on options that were provided with the item creation If only one delivery type is provided at creation, you will not be able to update.

To make updates at the student level got to *Student > Student Mgmt > Drop Down > **Merchandise***

To make updates at the class level go to *Course Mgmt > Coursers / Classes > Course Name > Class Drop Down > **Merchandise***

Merchandise Staff Management and Maintenance
Delivery Tracking - Continued

When updating the Delivery Status, the actual display screen will depend on the delivery type itself. We have a few examples below for you with different scenarios.

Pick Up

Pick-Up Processed By:

Choose from staff listings.

The time is auto-filled but can be modified.

Classroom

Assign Delivered By: this will modify the Delivery Processed by drop down.

Email / download

Change Delivery Status of Merchandise Items

Select one or more merchandise item(s) to change the Delivery status.
The merchandise items below are the results of the following search fields:

Group By = Carrier & Delivery Status   **Delivery Status =** Not Emailed/Downloaded

Change Status	Student Name (ID)/ Class (ID)	Purchase Date: TranID/ Item	Quantity	Delivery Type/ Carrier Service	Delivery Status
☑	Hoemberg Sarah(55161) / Art of Digital Photography 101 (27572)	3/21/2018: 69920/Syllabus Digital Photography(3)	1	Email\Download	Not Emailed/Downloaded

Change Status to Emailed/Downloaded for the selected item(s) above.

Comment:	
Emailed By :*	Poweruser 1 Terri
Time Emailed :*	5/30/2018 2:44 PM
	[m/dd/yyyy h:mm AM/PM]

[Submit] [Back]

Choose who emailed the document.

Shipped

Change Delivery Status of Merchandise Items

Select one or more merchandise item(s) to change the Delivery status.
The merchandise items below are the results of the following search fields:

Group By = Carrier & Delivery Status   **Delivery Status =** Not Shipped

Change Status	Student Name (ID)/ Class (ID)	Purchase Date: TranID/ Item	Quantity	Delivery Type/ Carrier Service	Tracking Info.*
☑	Aalright Barney(55134) / N/A	5/23/2018: 69958/School Logo Bandana(2) -Red	3		

Change Status to Shipped for the selected item(s) above.

Comment:	
Shipment Processed by :*	Poweruser 1 Terri
Time Processed :*	5/30/2018 2:45 PM
	[m/dd/yyyy h:mm AM/PM]

[Submit] [Back]

Add tracking info and Shipment Processed by.

Once the delivery is updated, reports will reflect the details as will the Student / Staff view of merchandise.

Merchandise Staff Management and Maintenance

Transfers or Returns

*Student > Student Mgmt > **Student*** Select *Transfer* from the drop-down menu.

This example has merchandise associated in both the transfer-out and the transfer-in classes.

View Registration Details for Sarah Hoemberg

Current Registrations	Transcripts	Tran History	Merchandise	Transfer	Cancel	Waiting List

Current Registrations for Hoemberg, Sarah

* Indicates payment includes On Account

Select	Class name (ID) Registration name	Start date	Class cost
	Anatomy-Human Body Function (27551) Hoemberg, Sarah	02/26/2018	$95.00
Transfer Class ▼	Basic Cake Decorating (27279) Hoemberg, Sarah	03/06/2018	$89.00

Locate the class

Choose *Transfer Class.*

Transfer Class List

Search using course or class name or course number or class id   [   ] [Search]

Use any part of the course or class name or the complete course number to search.
For a complete course listing, clear the search field, then press Search.

Showing records 1 through 12 of 22.

Course Number	Class Name (ID) /Date	Class Cost / Rem Seats	Action
			Late Registration
CLAR-3012	Art of Digital Photography 101 (27572) Schedule : Weekly - Mon, Wed 6:00 PM - 9:00 PM; 8 sessions; starting 6/4/2018, ending 6/27/2018	$95.00 25	Transfer in

Choose the class to Transfer in.

Transfer Registration Transaction Review

* denotes required information. If computed service fee is under $1.00, it is not displayed.

Student ID : Student Name	55161 : Sarah Hoemberg
Electronic Voucher Balance	$184.00
Registration Name	Hoemberg, Sarah
Registration ID : Date	85676 : 03/21/2018
Transaction ID : Date	69917 : 03/21/2018
Memo	[None]
Transaction Balance (Original payments minus previous refunds)	$101.00 - $5.00 = $96.00
Payment method(s)	Credit card - terminal : $89.00
Payments made	
Number of registrations in original transaction	1
Registration fee	$0.00

	Transferring from	Transferring to
Class ID	27279	27572
Class Name	Basic Cake Decorating	Art of Digital Photography 101
Start date	03/06/2018	06/04/2018
End date	03/27/2018	06/27/2018
Days until class	Started	75
Tuition fees (Fee minus discounts)	$89.00 - $0.00 = $89.00	$95.00 - $0.00 = $95.00 (Fee minus discounts)

Charge $20.00 service fee? *   ⦿ Yes ◯ No

Apply Electronic Voucher? *   ☐

[Continue] [Cancel]

Review the Transfer Registration Transaction Review screen for detail accuracy.

Click *Continue.*

The initial process of a class transfer is the same with or without merchandise. After review, you will be asked to decide on merchandise options.

Merchandise Staff Management and Maintenance
Transfers or Returns - Continued

Return Merchandise Transfer-out Class pop-up appears if the class transferring out of had a merchandise purchase.

Update
- Return Quantity
- Return to Quantity Available?

Click *Continue*.

Return Merchandise for Transfer-out Class

Item Name (SKU)	Cake Decorating for Special Occasions (8132)
Total Quantity	1
Return Quantity	1 Details Change to 0 if not returning.
Return to Quantity Available?	● Yes ○ No
Item Name (SKU)	Cookie Decorating for Kids (389411)
Total Quantity	1
Return Quantity	1 Details Change to 0 if not returning.
...ntity Available?	● Yes ○ No

Close Continue

Lumens returns a Purchase Merchandise Item for Transfer-in Class pop-up if the class to which you are transferring the student has merchandise associated with it.

Update:
- Delivery Method
- Quantity
- Click *Add / Update Item*

Click *Continue*.

Purchase Merchandise Item for Transfer-in Class

Item Name (SKU)	Editing Software (LL-DP-01)
Delivery Method	Classroom Delivery ▼
Quantity Available	100
Price	$49.00
Quantity	1

Add / Update Item

Discount will be applied to 1 item after you add the item and continue to next step.

Item Name (SKU)	Syllabus Digital Photography (090909)
Delivery Method	Email\Download ▼
Quantity Available	1000
Price	$0.00
Quantity	1

Add / Update Item

Item Name (SKU)	Delivery Method	Price	Quantity
Editing Software (LL-DP-01)	Classroom Delivery	$49.00	1
Syllabus Digital Photography (090909)	Email\Download	$0.00	1

Showing 1 to 2 of 2 entries

Close Continue

Merchandise Staff Management and Maintenance
Transfers or Returns - Continued

Transfer Registration Transaction Review - Step 2

* denotes required information. If computed service fee is under $1.00, it is not displayed.

Student ID : Student Name	55161 : Sarah Hoemberg
Registration Name	Hoemberg, Sarah
Registration ID : Date	85676 : 03/21/2018
Transaction ID : Date	69917 : 03/21/2018
Transaction Balance (Original payments minus previous refunds)	$101.00 - $5.00 = $96.00
Payment method(s)	Credit card - terminal : $89.00
Payments made	
Number of registrations in original transaction	1
Registration fee	$0.00

	Transferring from	Transferring to
Class ID	27279	27572
Class Name	Basic Cake Decorating	Art of Digital Photography 101
Start date	03/06/2018	06/04/2018
End date	03/27/2018	06/27/2018
Days until class	Started	Started
Tuition fees (Fee minus discounts))	$89.00 - $0.00 = $89.00	$95.00 - $0.00 = $95.00 (Fee minus discounts)
Merchandise Costs (Including Taxes)	$7.00	$49.00
Total Merchandise Item Discounts	$0.00	$0.00
Transfer service fee		+ $20.00
Payments Made for Merchandise Items		Sarah Hoemberg : $7.00
Payment Made (Does not include Registration Fees)		Sarah Hoemberg : $96.00
Suggested Payment Amount:		$68.00

Payment Options :   Sarah Hoemberg: Suggested Amount = $68.00

You may process a payment amount of zero if you choose not to require payment or to issue a refund.

Sarah Hoemberg Suggested payment amount:

68

Suggested action:

If you need to change the payment amount, please process an UNDERPAYMENT or OVERPAYMENT from the next page

◉ Payment ◯ Refund ◯ Zero amount

Continue   Cancel

Review Transfer Registration Transaction Review – Step 2.

This step will vary depending on the transfer situation. Define payment / refund.

Click *Continue.*

For scenarios requiring a payment, completed the checkout process.

Situations for which the Transfer-out class has merchandise and the transfer-in class does not, only the Transfer-out pop up will appear. Situations for which the Transfer-out class does not have merchandise and the transfer-in class does, only the Transfer-in pop up will appear.

Merchandise Staff Management and Maintenance
Transfers or Returns - Continued

*Students > **Student Mgmt***

Click the Action from the drop-down menu. Select *Return.*

- **Edit Delivery:** Allows you to edit the delivery method.
- **Change Status:** Allows you to change the status of this item.
- **Return:** Allows you to process a return/refund of this item.
- **Print View:** Displays transaction receipt.

Can the item be returned to the quantities?

Select Yes to increases the quantity available, the item may then be resold.

Selecting No will <u>not</u> increase the quantity available, item cannot be resold.

Charge Processing Fee?: This option will display if the refund policy defined with the item included a service fee.

Item Return Transaction Review - Step 2

* denotes required information.

Student ID : Student Name	55198 : Student, Terri
Transaction ID : Date	69954 : 05/17/2018
Memo	[None]
Payment Method(s)	Student, Terri : Credit card : $30.00
Number of registrations in original transaction	0
Number of items purchased in original transaction	1
Item SKU : Name	12345 : School Logo Tank Top Sizes-S
Item Qty / Price	1 / $30.00
Delivery Type/Status	Pick-Up / Not Picked-up
Return Quantity	1
Return to Quantity Available	Yes
Refund Item Price	$30.00

☐ Check box to split the refund between two refund methods

	Totals	Terri Student
School Logo Tank Top		
Refund	($30.00)	30.00
Total Refunds	($30.00)	($30.00)
Refund Method for Terri Student	Refund to credit card	

[Continue] [Cancel]

Review details.

Refund method is defined by the assigned refund policy.

Item Return Transaction Summary

Student ID : Student Name	55198 : Terri Student
Student Address	100 Wayzata Blvd Golden Valley, MN 55426
Transaction ID : Date	69965: 05/30/2018 Add Memo
Item SKU : Name	12345 : School Logo Tank Top
Return Quantity	1
Return to Quantity Available	yes
Refund Payment Method	Refund request form

Product	Amount
Refund Amount	($30.00)
Transaction Amount	($30.00)

Back to Student Merchandise Pages

View Registration Details for Terri Student

Current Registrations	Transcripts	Tran History	Merchandise	Transfer	Cancel	Waiting List

Back to Students   Back to Current Student   Student Account

Current Electronic Voucher Balance: $0.00

A/R Account Balance: $0.00

Recent Transactions for Student, Terri

Select	Transaction Date	Transaction Type (ID)	Payment Method	Payer	Transaction Amount
Action ▾	05/30/18	Return Merchandise Item (69965)	Refund request form	Student, Terri (Student)	$30.00

Merchandise Staff Management and Maintenance
Reports

*Reports > **Merchandise***

merchandise	Type	Action
Classroom Delivery	Standard	Run / Schedule | Edit | Add to my favorites
Current Quantity	Standard	Run / Schedule | Edit | Add to my favorites
Daily Purchases	Standard	Run / Schedule | Edit | Add to my favorites
Item History	Standard	Run / Schedule | Edit | Add to my favorites
Merchandise Below Re-Order Quantity	Standard	Run / Schedule | Edit | Add to my favorites
Merchandise Pick List	Standard	Run / Schedule | Edit | Add to my favorites
Sales Totals	Standard	Run / Schedule | Edit | Add to my favorites
Shipping Costs: Detailed	Standard	Run / Schedule | Edit | Add to my favorites
Shipping Costs: Summary	Standard	Run / Schedule | Edit | Add to my favorites

Classroom Delivery: Tracks item status' when delivery method of Classroom is selected.
Current Quantity: Provides a current summary of quantities on-hand and quantities available for Merchandise Items.
Daily Purchases: Lists each transaction of an item purchased on a daily basis.
Item History: Provides a history on this particular item for inventory tracking.
Merchandise Below Re-Order Quantity: Tracks of items that are below inventory level.
Merchandise Pick List: Defines which items to select from storage location in order to prepare them for delivery via pickup, Classroom delivery and shipping.
Sales Totals: Displays all sales totals for each merchandise item.
Shipping Costs: Detailed/Summary: Available if shipping is used.

Process recommendations
- Use the Delivery Status of Delivered to Classroom, Emailed / Downloaded, and Pick-up to track what has been delivered to the Classroom and what has been emailed / downloaded. This is useful if a Student comes back and states they did not receive an item.

- For Classroom Delivery, after picking the items on the Merchandise Pick List, run the Classroom Delivery Report. This report allows a Staff Member, who delivers Merchandise Items with Delivery Type set to Classroom Delivery to the actual Classroom. It also allows the Staff Member to organize the Merchandise for delivery and record that the items have been distributed to the Students who purchased them.

Information:
Have the Student's initial on the print out of this report that they received the item(s). This will be useful later when Students question whether they received the item in the future. We recommend having a dedicated staff member(s) assigned to manage this new line of business, including data entry, inventory management and delivery status updates. Reports will only provide the data that is being input.

Knowledge Review
Set Up and Preparation Review

This review is based on the *Set Up and Preparation Module* of Merchandise. Use this review to check your knowledge of the topics and objectives of the module.

Objectives for Merchandise Set Up and Preparation:
- Review accounting code needs
- Define shipping and delivery options
- Create attributes, items, and delivery requirements for merchandise
- Identify if items are added to Courses, Classes, or sold individually

To complete this review, use the *Set Up and Preparation Module* as a resource.
- The review has five questions (multiple choice or True / False).
- Answer the questions to the best of your knowledge.
- Compare your responses against the answer key (how did you do?).

1. **T / F:** You can't set up a fee to charge when creating a merchandise return policy.

2. Which of the following delivery types are available for merchandise?
- o Classroom
- o Pick Up
- o Ship
- o All of the above

3. **T / F:** You must create an account with UPS or FedEx to provide those shipping options.

4. Merchandise can be associated with the following.
- o Contract
- o Course
- o Instructor
- o Location

5. **T / F:** You can set a merchandise item to have no cost with a course but a cost if purchased individually.

Knowledge Review

Set Up and Preparation Review Key

Review answer key:

Expected Results	Related Information
F: You can't set up a fee to charge when creating a merchandise return policy.	False, Merchandise west includes creating refund policies including fees if applicable.
Which of the following delivery types are available for merchandise? o All of the above	
T: You must create an account with UPS or FedEx to provide those shipping options.	
Merchandise can be associated with the following. o Course	
T: You can set a merchandise item to have no cost with a course but a cost if purchased individually.	

Additional Reference:
Customer Support > Document Center >Quick Reference Aid > **Coming soon**

Knowledge Review
Buyers Experience Review

This review is based on the *Buyers Experience Module*. Use this review to check your knowledge of the topics and objectives of the module.

Objectives for Merchandise Buyers Experience:
- Complete purchase of an individual merchandise item
- Review merchandise dashboard view
- Register for a Class that includes a merchandise item

Ask yourself if the module met the objective.

To complete this review, use the *Advanced System Options Module* as a resource.
- The review has five statements below.
- Add the missing information.
- Compare your responses against the answer key (how did you do?).

A student can _____ a file directly upon merchandise purchase.

If a school desires, students can purchase items as part of courses/classes but also as _____ purchases.

When a student makes a purchase, they will have a _____ tab display in their student view that will provide specific details of the purchase.

When viewing _____ a student will be able to see the merchandise associated with a specific class including the price being charged for the item.

If an item is purchased as part of a class, the item will not display in the students _____ view but will display in the merchandise tab.

Knowledge Review
Buyers Experience Review Key

Review answer key:

A student can _____download_____ a file directly upon merchandise purchase.

If a school desires, students can purchase items as part of courses/classes but also as _____individual_____ purchases.

When a student makes a purchase, they will have a _____merchandise_____ tab display in their student view that will provide specific details of the purchase.

When viewing _____class details_____ a student will be able to see the merchandise associated with a specific class including the price being charged for the item.

If an item is purchased as part of a class, the item will not display in the students _____current registrations_____ view but will display in the merchandise tab.

Additional Reference:
*Customer Support > Document Center >Quick Reference Aid > **Coming soon***

Knowledge Review
Staff Management and Maintenance Review

This review is based on the *Staff Experience Module.* Use this review to check your knowledge of the topics and objectives of the module.

Objectives for Merchandise Staff Management and Maintenance:
- Review the purchase process in Lumens
- Discuss the delivery tracking options
- Process a return of merchandise
- Identify the applicable reports to manage merchandise tracking

To complete this review, use the *Staff Experience Module* as a resource.
- The review has five questions (multiple choice or True / False).
- Answer the questions to the best of your knowledge.
- Compare your responses against the answer key (how did you do?).

1. **T / F:** When a staff member completes a registration with merchandise, the staff member will have the ability to update the delivery method is Pick Up is the delivery method.

2. Staff have the ability to manage the delivery attributes of a purchase. Which two items can be completed by a staff member?
- o   Edit Payment Method/Change Payment Date
- o   Edit Delivery Type/Change Status
- o   Edit Item Name/Edit Item Quantity
- o   All of the above

3. **T / F:** Staff cannot process a transfer of a class with merchandise of the transfer into does not have merchandise.

4. When returning a merchandise item, the following information is modifiable during the transaction.
- o   Item SKU/Name
- o   Payment Method
- o   Quantity/Price
- o   Return Quantity

5. **T / F:** The Sales Totals report provides individual item sales results.

Knowledge Review
Staff Management and Maintenance Review Key

Review answer key:

Expected Results	Related Information
T: When a staff member completes a registration with merchandise, the staff member will have the ability to update the delivery method is Pick Up is the delivery method.	
Staff have the ability to manage the delivery attributes of a purchase. Which two items can be completed by a staff member? ○ Edit Delivery Type/Change Status	
F: Staff cannot process a transfer of a class with merchandise of the transfer into does not have merchandise.	False: Staff can transfer a student into or out of a class without the other class having merchandise.
When returning a merchandise item, the following information is modifiable during the transaction. ○ Return Quantity	
T: The Sales Totals report provides individual item sales results.	

Additional Reference:
*Customer Support > Document Center >Quick Reference Aid > **Coming soon***