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Section I: Welcome to Marketplace!

A. Why Marketplace?
The Office of the Bursar in conjunction with Information Technology Systems has determined it necessary to reduce the University’s PCI scope. One way to do so is to consolidate the number of third party systems used in credit card processing across the University. TouchNet Marketplace utilizes the TouchNet Payment Gateway, which can be used by both smaller departments with low volume credit card payments via a uStore as well as larger departments using a TouchNet Ready Partner via uPay. The ultimate goal is to reduce the number of individual merchant accounts open at the University as well as streamline the third party vendors used for credit card processing.

Once logged into TouchNet, navigate to the Marketplace Operations Center: Applications → Marketplace

B. The Mall
The Mall (named UConn Marketplace) is the main webpage that displays all uStores and uPay products/services. The ultimate goal is for the University to have a single website that all customers can visit for online purchases.

The Mall is the highest level of Marketplace (Mall, Merchant, Store, Product). All mall level settings are determined and maintained by Cash Operations.
To navigate to the Mall in the Marketplace Operations Center:
Marketplace Home → View Mall

In the upper left hand corner of the page, the customer can filter the Marketplace by choosing to shop by Store, Store category, and product category. The categories are determined by Cash Operations on the mall level.

C. uStore vs. uPay

Marketplace offers two options: uStore and uPay. uStore is intended for departments who wish to accept credit card payments for products/services/events and require basic collection of information. uStores will fit the needs of a majority of departments at UConn. uPay is used by departments who require a TouchNet Ready Partner (third party vendors who are compatible with Marketplace) to collect more in-depth and complex information. With uPay, information is collected by the TouchNet Ready Partner system and Marketplace acts as only the payment gateway.
D. Marketplace User Roles

There are a variety of user roles in Marketplace. Proper separation of duties should be utilized when assigning roles. Below are detailed descriptions of each role:

Merchant Manager: Assigned by Cash Operations
- Manage general merchant settings
- Grant the store manager and uPay site manager user roles to other users
- Add stores and uPay sites for the assigned merchant
- Edit general settings for stores created under the assigned merchant
- Add accounting codes and assign the accounting code used for taxes
- Review Marketplace financial reports

User Manager: Assigned by the Merchant Manager
- Manage and configure general store settings
- Bring stores online and take stores offline (and schedule status changes)
- Configure text messages
- Configure shipping classes and rates
- Configure store product categories
- Add and edit products
- Configure payment methods that are allowed with user groups
- Configure user modifiers
- Configure tax settings
- Grant the store clerk, fulfiller with refund/cancel rights, and fulfiller user roles to other users
- View Marketplace financial reports for the store

Store Clerk:
- Add and edit products in their assigned store and move products among categories

Fulfiller with Refund/Cancel Rights:
- Fulfill, Refund, and Cancel Orders
- For orders made with an ACH payment method, override the waiting period and proceed with fulfillment

Fulfiller:
- Fulfill orders

Store Accountant:
- View Marketplace Financial Reports for the Store
E. Administrative Responsibility

Both Cash Operations and departments have administrative responsibilities associated with Marketplace:

Cash Operations
- Primary liaison between the University and TouchNet (payment gateway and third party provider of Marketplace) as well as with Global (credit card processor)
- Collaborates with ITS to ensure PCI Compliance is achieved and maintained at the University level
- Reviews and approves all new Marketplace Merchant requests in conjunction with Information Technology Services and Office of the Controller
- Creates initial Merchant setup once request is approved
- Add and Disable users in TouchNet and Marketplace
- Maintains all settings at the Mall level
- Responsible for recording all Marketplace payments (ACH and credit card) in KFS
- Responsible for paying monthly credit card processing fees (Global and AmEx) and charging Merchants appropriately within KFS
- Primary contact for departments for all Marketplace related questions

Departments
- Responsible for understanding and adhering to all Marketplace Guidelines
- Responsible for ensuring PCI Compliance at the departmental level
- Maintains Merchant settings, Stores, Products, and Users within the Merchant
- Fulfills all orders under their Merchant(s)
- Primary contact for their customers
- Respond to any chargeback or returned payments timely
- Reconcile payments processed in Marketplace to revenue recorded in KFS on at least a monthly basis

Section II: Merchant Setup

Merchant is the top level for departments. Each department will be setup as a Merchant in Marketplace with a designated Merchant Manager. Cash Operations will create the Merchant with initial settings. The Merchant Manager can adjust as necessary.

To navigate to your Merchant:
Left Hand Toolbar ➔ Locate your Merchant Name ➔ Click to Expand

![Marketplace Operations Center Home](image-url)
A. Merchant General Settings

Merchant Information
- Merchant Name – determined by Merchant Manager (suggest department name)
- Payment Gateway – will be setup by Cash Operations

Credit Card Information
Should always be selected; credit card should always be authorized at order time

ACH Payment Settings
If the Merchant Manager chooses to charge a return ACH fee, your department is responsible for invoicing and collecting payment from the customer. This cannot be automatically done through Marketplace, nor will Cash Operations be involved in the process of charging and collecting this fee. Note: ACH payments can take up to 7 business days to be returned. Therefore, the Merchant Manager may choose to wait at least 7 business days before fulfilling an order paid by an ACH payment.

Merchant Manager
Cash Operations setup a single Merchant Manager during initial setup
B. Merchant Accounting Codes
The KFS accounts that will be linked with your department’s products need to be added at the Merchant level as an Accounting Code. Cash Operations will setup your Merchant, and the Merchant Manager can add as many accounting codes as needed.

IMPORTANT: It’s crucial to format the accounting code properly to ensure accurate upload into KFS. The format is: \texttt{ACCOUNT|SUB ACCOUNT|OBJECT CODE|SUB OBJECT|PROJECT}

If not all fields are used, then skip that portion of the code but still use | to separate the fields. For example, if you will only use account (ex: 1234567) and object code (8900), then the format is: 1234567|8900

Additionally, Cash Operations will add Tax KFS accounts at the Mall level. These will show as “Available Common Accounting Codes” and the Merchant Manager can add the appropriate tax KFS accounts to your Merchant to be assigned in future settings. See Tax Accounting Code below for more information.
C. Merchant Account Users

The Merchant Manager can view, edit, or assign a user as Store Manager on the Users screen. Store Managers
To add a user to your Merchant, select view U.Commerce Users.

This screen will show all users entered in Marketplace. You can search by user name, then select Edit User.

Here you can assign a user as a Store Manager. Then select Save. Note: Additional user roles are set at the
Store level.
D. Merchant Tax Accounting Codes
KFS accounts specific for recording tax will be setup at the Mall level by Cash Operations. The Merchant Manager will assign the appropriate KFS tax account for your department under Accounting Codes (see above). The KFS account can then be assigned appropriately to tax under on the Tax Accounting Codes screen. Please contact the Tax and Compliance Office to ensure you are properly charging and recording tax on your sales.

Section III: Setting Up a Store
Once the Merchant Manager has ensured all Merchant Settings are accurate as outlined in Section I, the Merchant Manager can add a new Store.
Enter the name for the Store and select the Marketplace user who will be the Store Manager (Contact Cash Operations at marketplace@uconn.edu to add users to TouchNet) then click Add New Store.

A. What to Consider Ahead of Time
Before the Merchant Manager or Store Manager begins the Store setup, there are a few things that should be considered ahead of time:

- What KFS accounts will be used? Are those accounts setup and current in KFS? Has the Merchant Manager properly entered those accounts under Account Codes at the Merchant Level?
- Will there be any shipping? If so, what are the shipping classes? Is there an extra cost for shipping?
- Does the product(s) sold in the Store require tax? Has the tax KFS account been added under Accounting Codes and assigned to a tax class at the Merchant Level?
  - What is the Store’s Return Policy?
  - What should the Store’s order e-mail messages say?
  - Will you allow refunds? What is the refund policy?
  - Will the Store be selling multiple products? If so, should categories be setup within the Store?
B. Customizing the Store
Once the Merchant Manager or Store Manager has considered the above, he/she can begin customizing up the Store by navigating through the various Store Settings:

Detail information on each setting is provided below

---

### General Settings

<table>
<thead>
<tr>
<th>Store Id</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Store Name</td>
<td>This Event 2018</td>
</tr>
<tr>
<td>Store Display Name</td>
<td>This Event 2018</td>
</tr>
<tr>
<td>Store status</td>
<td>Disabled</td>
</tr>
<tr>
<td>Point of Sale status</td>
<td>Disabled</td>
</tr>
<tr>
<td>Applies only to this store and products</td>
<td>Management Status</td>
</tr>
<tr>
<td>Time Zone</td>
<td>Eastern Standard Time - America/New_York (-5.0)</td>
</tr>
</tbody>
</table>

---

### Donation Notification

To send donation notifications, enter email address. For multiple email addresses use a comma as a separator.

Email addresses: (500 chars max)

---

### Low Inventory Product Notification

To send low inventory notifications for products, enter email address. For multiple email addresses use a comma as a separator.

Email addresses: (500 chars max)
Store Id
This field displays the ID assigned to the Store. You will need this ID number if you wish to determine the Store's URL before the Store goes online or using Store mode (see more later in this resource). The Store ID will also be referenced in the output file that will be used by Cash Operations to upload payments into KFS.

Store Name
The Store Name appears in the Operations Center and in Marketplace reports. You can change the Store name at any time here.

Store Display Name
The Store Display Name is the name you want shoppers to see in the site and in e-mail correspondence regarding orders. Typically will be consistent with Store Name set above.

Store Status
This field will say Disabled, Enable, or Preview. The status of the Store can be changed by selecting the Manage Status link. (Note: Point of Sale is not currently available; keep status as Disabled).
- Disabled: Stores in a disabled mode are not available to shoppers and will not be displayed in the UConn Marketplace. This mode should be used when a Store is no longer needed or temporarily not being used.
- Preview: Stores in preview mode are not available for shoppers. Once a Store is placed in preview mode, it can only be reached by using the preview link on the Store General Settings page. Preview mode should be used while developing the Store, before it’s ready to go-live in the UConn Marketplace for shoppers to visit.
- Enable: A Store should be set to Enable only when it is ready to go-live in the UConn Marketplace. Enabling the Stores makes it available to shoppers.

Time Zone
All Stores should be set with Eastern Standard Time – America/New York.

Donation Notification
Only required if your Store will be collecting donations. Notifications emails will be sent to all email addresses entered here when a donation is made in the Store. Multiple email addresses can be entered by using a comma to separate.

Low Inventory Product Notification
When setting up a product, you can select to receive Low Inventory Notifications once the remaining inventory for that product reaches a specified quantity. Here, you can enter all email addresses that should receive the Low Inventory Notification. Multiple email addresses can be entered by using a comma to separate. Note: The notification will go to these email addresses for all products in this Store that are set for low inventory notification.
Total Digital File Space Used By Store
Displays the total file space (in bytes) used by this Store's digital products.

Total Size Available for Digital Files
Displays the total file space (in bytes) designated for this Store's digital products. This value is set at the Mall level. If your Store needs more total file space for digital products, contact Cash Operations at marketplace@uconn.edu.

Allow Partial Refunds
The refund process for each Store can be set to either run in the standard mode (in which only complete refunds are allowed) or in the partial refunds mode (in which the Fulfiller can enter a refund amount up to the total transaction amount). To use the standard refund mode, select No for the Allow Partial Refunds prompt. To use the partial refunds mode, select Yes.

Allow The Refund of Shipping
To allow for the refunding of shipping, select Yes. If you select No, Fulfillers will not be able to refund shipping.

Allow Recurring Payments On Donation Product Type
To allow donors to use recurring payments with donation products, select Yes. This option must be enabled before donation products can be configured to offer recurring payments.
Perform General Ledger Updates
All Stores should select “Yes” to ensure all sales are properly recorded in KFS. The only exception is if your Store is used to collection payments for KFS invoices. Please ask Cash Operations for more information.

Default Accounting Code
A Default Accounting Code must be set by selecting an accounting code in the drop-down list. The drop-down lists all the accounting codes that are available for this Store to use as entered by the Merchant Manager. If you do not see the appropriate accounting code, please contact the Merchant Manager so he/she can add. Note: The default accounting code can be over-ridden when setting up individual products.

Continue Shopping Button settings
This setting determines what will happen when the customer selects the Continue Shopping button at the conclusion of the checkout process. Three choices are available: Navigate to Product Page, Navigate to Store Page, or Use Default Settings as set at the Mall level by Cash Operations.

Store Category Assignments
Stores can be assigned to Mall level Store categories as set by Cash Operations. Merchant or Store Managers can then select the appropriate categories for their Stores. The available categories appear in the New Assignment list box. To assign a Store to a category, select the category name from the New Assignment list box and then click the Add New Assignment button. You can CTRL+click multiple Store categories or SHIFT+click a range of Store categories. After you click the Add New Assignment Button, the selected categories will be moved to the Current list box.

Mall Storefront Tile Image
The tile image is the picture that will show for the Store in the UConn Marketplace. The tile image for a Store can be uploaded by selecting the Upload Tile Image button. If no image is uploaded a default Storefront tile image will be displayed. Recommended size for the Storefront tile image: 190 pixels wide by 90 pixels high.

As of March 2018
QR Code Management
A QR Code can be created for the Store. The QR will bring the customer to the URL as shown in the Embedded Link field. Here, you can choose the code size and file type.

Status Management
By default, new Stores are initially disabled. However, you will need to choose a status from the dropdown list depending on the stage of your Store:

- Disabled: Stores in a disabled mode are not available to shoppers and will not be displayed in the UConn Marketplace. This mode should be used when a Store is no longer needed or temporarily not being used.
- Preview: Stores in preview mode are not available for shoppers. Once a Store is placed in preview mode, it can only be reached by using the preview link on the Store General Settings page. Preview mode should be used while developing the Store, before it’s ready to go-live in the UConn Marketplace for shoppers to visit.
- Enable: A Store should be set to Enable only when it is ready to go-live in the UConn Marketplace. Enabling the Stores makes it available to shoppers

You can also schedule status updates. For example, you may only want your Store available from 8:00 am. to 5:00 pm, or open only during certain times of the year such as December - May.
Email Messages
Here you can customize the emails that will be send to your Store’s customers:

Email Thank You Statement
The Email Thank You Statement appears on e-mail messages generated to customers after orders have been placed. This statement appears immediately below the message heading. The Thank You Statement also appears on fulfillment e-mail notifications, order cancellation e-mail notifications, and refund confirmations.

Note: When using this field, keep in mind the text you enter in this field will be used with all four message types described above, so you should avoid entering any text in this field that is only relevant for order confirmations or only relevant for fulfillment confirmations. Separate announcement fields (as described below) are available for each message type.

Email Order Announcement
The Email Order Announcement appears on e-mail messages generated to customers after orders have been placed. Use this announcement field to enter a paragraph that tells customers their orders have been received.

Email Fulfillment Announcement
The Email Fulfillment Announcement appears on e-mail messages generated to customers upon the completion of the fulfillment process. Use this announcement field to enter a paragraph that tells customers their payment method has been processed and their orders are being shipped.

Email Cancel Order Announcement
The Email Cancel Order Announcement appears on e-mail messages generated when orders are cancelled during the fulfillment process (for example, because an item is no longer available, because the customer’s payment card number is incorrect, because the customer’s payment card has expired, etc.). Use this announcement field to enter a paragraph that tells customers their orders have been cancelled.
Email Refund Order Announcement
The Email Refund Order Announcement appears on e-mail messages generated to customers after refunds have been issued. Use this announcement field to enter a paragraph that tells customers their refund request has been processed.

Text Messages
This option will not be currently utilized. There is no need to edit the various message options.

Single Store Mode
Single-Store mode allows you to establish Stores that are not necessarily displayed in the UConn Marketplace. Customization options are available for Stores in Single Store mode that are not otherwise available. These customizations involve look-and-feel options as well as modifications to selected button/link text. In addition, options are available for showing/hiding some of the page elements. To activate single-Store mode, select the "Yes" radio button and setup customizations.
Store Template Setup
Currently, the only template is the Designer Fixed Width Store Template with General Layout. Select Edit to customize the Hero Image, Feature 1, and Curtain Navigation.

Important! The email entered under Contact Us in Curtain Nav is what will appear as the sender for the order confirmation emails. Also under Curtain Nav is where you will enter your Store’s Return Policy that will be displayed during checkout.

Example of what each area corresponds to on the UConn Marketplace:
If Single Store Mode is used, you will have additional tabs with more customizable settings.

**Things to keep in mind under Single Store Layout tab:**
- Global Nav Bar: Choose “Yes” for Show User Account Menu to allow the customer to check-out with their saved payment methods
- Curtain Nav: Turn the Return Policy Label to “On” to ensure the Store’s Return Policy is shown to the customer during checkout

**Users**
Here you can assign user roles to your Store. See Section I Part D for detailed user role descriptions.

To assign users, select View U.Commerce Users to see all available users in TouchNet/Marketplace. If a user needs to be added, please contact Cash Operations at marketplace@uconn.edu.

---

**This Event 2018: Users**
Click the user's name to send an e-mail. Click Edit User to assign or remove roles.

### Store Managers

<table>
<thead>
<tr>
<th>Show</th>
<th>entries</th>
<th>Full Name</th>
<th>U.Commerce Username</th>
<th>Marketplace Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td></td>
<td>Manis, Sherri</td>
<td>C21646.smanis</td>
<td>Enabled</td>
</tr>
</tbody>
</table>

Showing 1 to 1 of 1 entries

### Fulfillers With Cancel/Refund Rights

<table>
<thead>
<tr>
<th>Show</th>
<th>entries</th>
<th>Full Name</th>
<th>U.Commerce Username</th>
<th>Marketplace Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Fulfiller with Cancel/Refund Rights has not been assigned. Select user and assign role.

Showing 1 to 1 of 1 entries

### Fulfillers

<table>
<thead>
<tr>
<th>Show</th>
<th>entries</th>
<th>Full Name</th>
<th>U.Commerce Username</th>
<th>Marketplace Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td></td>
<td>Hesseg, Hayley</td>
<td>C21646.hhesseg</td>
<td>Enabled (Disable)</td>
</tr>
</tbody>
</table>

Showing 1 to 1 of 1 entries
Locate User, select Edit User.

**U.Commerce Users**

Click Edit User to change the user's roles.

<table>
<thead>
<tr>
<th>Full Name</th>
<th>U.Commerce Username</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Birch, Natasha</td>
<td>C21646.nbirch</td>
<td>Edit User</td>
</tr>
<tr>
<td>Birch, Natasha</td>
<td>C21646.NBIRCHADMIN</td>
<td>Edit User</td>
</tr>
<tr>
<td>Comrie, Cassandra</td>
<td>C21646.ccomrie</td>
<td>Edit User</td>
</tr>
<tr>
<td>Hesse, Hayley</td>
<td>C21646.hhesse</td>
<td>Edit User</td>
</tr>
</tbody>
</table>

Assign roles from list of Available Roles for this User and click Save.
Payment Methods
Available payment methods are set at the Mall level by Cash Operations. Available options in Marketplace are: Credit/Debit Cards (Visa, Discover, MasterCard, American Express, Diners Club, JCB, and ChinaUnionPay). We anticipate to also offer ACH/eCheck by end of 2018. Select which methods you wish to offer in your Store (it is recommended you allow for all available methods).

Shipping Classes
A shipping class must be setup before you can create a product. If your product does not require shipping, such as event registration, then you can create a shipping class called “None”, “No Shipping”, “Shipping Not Required”, etc.

**Note: You can only assign one shipping class to each product.** If you want to offer different shipping options to your customer such as Standard or Priority, you can utilize Delivery Methods (read on for more information on delivery methods).

When you set up shipping classes for a Store, you will be asked to enter a default delivery location. This delivery location is used for calculating tax on products that do not require delivery, such as event registrations. This delivery location will also be used for delivery options such as will-call, in which the customer picks up the product and no delivery takes place.

For each shipping rate, you must choose the correct tax level to charge on shipping. If your product does not require tax, select No Tax. If it does require tax, use default tax rate. As always, please contact the Tax and Compliance Office to ensure tax compliance to ensure you are properly using (or not using) sales tax for your products.
Follow these steps to set up shipping classes for your Store:

**This Event 2018 Shipping Classes**

A shipping class is required for product setup. Available delivery methods and tax rates are set up by the administrator.

**Add Shipping Class**

Default Delivery Location: You must enter a City, State, and Zip+4 Postal Code. You must know the ZIP+4 for the default delivery location before you can create a new shipping class. **Important!** Default Delivery Location will be used to calculate tax for delivery methods that do not require shipping (i.e. none, walk-in, etc.).

<table>
<thead>
<tr>
<th>Enter New Shipping Class Name:</th>
<th>Standard (2-3 weeks)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter Default Delivery Location:</td>
<td></td>
</tr>
<tr>
<td>City:</td>
<td>Storrs</td>
</tr>
<tr>
<td>State:</td>
<td>Connecticut</td>
</tr>
<tr>
<td>ZIP / Postal Code:</td>
<td>06269-4100</td>
</tr>
</tbody>
</table>

Once the shipping class is created, you will need to configure the delivery methods applicable for this shipping option. These methods will be shown to the customer during check-out. This is where you can build-in options such as Standard or Priority. Adjust rates, select the appropriate tax class and accounting code. Delivery Methods are added to Marketplace by Cash Operations. If you need additional methods, please contact Cash Operations.

**Important!** If charging tax, be sure to assign the appropriate Tax accounting code to ensure appropriate recording in KFS!

**Important!** Shipping Address Required must be selected for delivery methods that will be used to actually ship a product. This will ensure that tax is properly calculated. For products not being shipped, do not select this option; tax will then be charged based on the default delivery address. See Tax Service for more information.

---

As of March 2018
Categories
You can create product categories and sub-categories for your Store to make it easier for shoppers to find what they’re looking for. To add a category, select Add Top-Level Category.

**This Event 2018 Categories**

Add top level categories. Edit or add sub categories to current store categories.

Add Top-Level Category  Manage Category List

Enter the category name and choose a layout for the category page:
- Detailed: The shopper sees product thumbnail images, short descriptions, names, and prices. This layout works well for categories that don’t contain many products, or when you want to quickly advertise more information about the products in a category. The shopper scrolls down the page to see each detailed product listing.
- Thumbnail: The shopper sees product thumbnail images and names. This layout works well for many product groupings. Products appear from left to right in rows on the page.
- Name and Price: The shopper sees product names and prices. This layout works well when products don’t have images, or when the category contains many products. With the Name and Price, layout, shoppers won’t have to scroll as far through a long product list.

<table>
<thead>
<tr>
<th>New Category Name: (50 characters max)</th>
<th>Apparel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Layout:</td>
<td>Detail Layout</td>
</tr>
</tbody>
</table>

**Allowed Groups**
We are not currently utilizing this feature.

**Group Payment Methods**
We are not currently utilizing this feature.
Promotions
Here you can customize Promotions for your Store, Category, Product or Order.

This Event 2018 Promotions

Promotions require the buyer to enter a promotional code. When a promotion expires, archive it to reuse its promotional code.

Add Promotion
Store Promotion  Category Promotion  Product Promotion  Order Promotion

Current Promotions

<table>
<thead>
<tr>
<th>Code</th>
<th>Name</th>
<th>Type</th>
<th>Start Date</th>
<th>End Date</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>FRXY10</td>
<td>Friday Take 10</td>
<td>Order</td>
<td>2/1/18</td>
<td>2/1/18</td>
<td>Archive</td>
</tr>
</tbody>
</table>

Future Promotions
No Future Promotions

Expired Promotions
No Expired Promotions

Promotions that Reached Max Number of Uses
No Promotions that Reached Max Number of Uses

 Archived Promotions
No Archived Promotions

Complete Promotion details for selected level:

Promotion Information
If a promotion code is not provided, a system generated numeric promotion code will be assigned.

Promotion Code:

Name of Promotion:
Promotion Description:

Promotion Discount
Promotion Type:

All amounts are in USD ($) For percentage off promotions enter the percentage as a whole number. 10 for 10%. For amount promotions enter the amount. $5 for $5.00 Value Off:

Promotion Usage
From:
Can a customer use this promotion code more than once?
Yes  No
Maximum number of times this promotion code can be used by all users:

Products to Include
Leadership Workshop

Promotion Email
Email Addresses Receiving Promotion:

Delimiter used to separate Email Addresses:

Send Email to specified Email Address:
**User Modifiers**

A User Modifier is a custom field that can be added to the checkout process whenever a product for that Store has been placed in a customer's shopping cart. For shoppers, user modifiers appear as fields/questions near the conclusion of the checkout process. User modifiers do not add cost to the purchase or change products in any way. These fields are strictly for informational purposes and are used for capturing additional information about customers.

There are three different types of modifiers: Drop-Down Selection, Text Entry, Multiple Select Checkboxes. Select the type you wish to use and enter all fields.

**Important!** Marketplace does not encrypt user modifier data in storage or mask this data in reports. Therefore, sensitive material should not be collected using the user modifier fields. For example, collecting Social Security Numbers with a user modifier field would increase the risk of the misuse of this information (i.e., identity theft).

The Table Builder organizes modifiers in a table format, making it more convenient for customers to enter information for multiple modifiers during the uStores checkout process. Each column of the table represents a user modifier that is set up and controlled independently from the table.

### This Event 2018 User Modifiers

Modifiers can be configured for information collection about the buyer.

<table>
<thead>
<tr>
<th>Add Modifier</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Example</td>
</tr>
<tr>
<td>Drop-Down Selection</td>
<td>Example Optional</td>
</tr>
<tr>
<td>Text Entry</td>
<td>Example Optional</td>
</tr>
<tr>
<td>Multiple Select Checkboxes</td>
<td>Example Optional</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Add Modifier Group</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Example</td>
</tr>
<tr>
<td>Table Builder</td>
<td>Example</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Current Modifiers</th>
<th>Format</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Sort Key</td>
<td>Type</td>
</tr>
<tr>
<td>No modifiers are currently configured for this store</td>
<td>What is this?</td>
<td></td>
</tr>
</tbody>
</table>
**Tax Service**
Tax Service should always be utilized if your product requires sales tax. The Tax Service will automatically calculate the appropriate sales tax based on the Shipping Classes and Tax Service Settings.

**Important!** For products requiring sales tax – Tax only needs to be assessed if the product is received by the customer in the same state that the business has an established “presence”. Since the University only has a presence in Connecticut, products should only be charged sales tax if the product is being received in Connecticut (i.e. if the product is being picked-up at the department or shipped to a Connecticut address). Sales tax is not required if the product is being shipped outside of Connecticut. Refer to Shipping Classes for further information.

Select Yes to utilize the Tax Service

Settings for the usage and locations of the tax service.

**Tax Service Settings**
Tax Service calculates tax rate based on the delivery address (zip+4) for the selected states, territories, and armed forces. When not using Tax Service, the Tax Rates files (city_country.dat, taxrates.dat) provides the tax rate for the City, County and State.

Use Tax Service:  

Add Connecticut and select Save at bottom of screen. Note: Only Connecticut should be added.
Tax Account Codes
Here you can override the tax accounting codes setup at the Mall and Merchant Levels. Note: Accounting Code must still be initially setup by the Merchant Manager.

Section IV: Setting up a Product

A. What to Consider Ahead of Time
Now that you have the Store setup, it’s time to add products! Before doing so, there are a few things you should consider to make the process easier:

- What KFS account should revenue for the sales be deposited into? Has that account been setup as an Accounting Code by the Merchant Manager?
- Does the product have different options such as size, color, etc.? If so, do any of the options change the price of the product?
- What information do you need to collect from the customer? How should it best be asked – text entry, dropdown, multiple selection? Do you need this information for each quantity being purchased, or just once regardless of the quantity?
- Is there a limited quantity available?
- Is there different shipping options? If so, are you going to charge for shipping? Should Tax be assessed?
- Should this product be shown as an option to add as an “additional item” when shoppers checkout? For example, option to add a purchased lunch when checking-out for an all-day seminar.
B. Modifiers vs. Options
Products can be set up with options and with modifiers. Product modifiers and product options are very different. It’s important to understand the difference so you can effectively set up your product.

An option is a factor such as size or color that changes a product’s stock number. For instance, you might offer a shirt in two colors (white and gray) and four sizes (small, medium, large, and extra large). Instead of adding eight different products to capture each possible combination, you can instead enter the shirt as one product with an option for color and an option for size. The eight option combinations are eight separate stock items instead of eight different products.

In contrast, when you add a modifier to a product, you are not changing the base product, but are capturing an additional piece of information regarding the order. For example, the product may be a shirt and the modifier is a monogram. Or, the product may be a seminar and the modifier is lunch selection. The modifier may be used to customize the product for the customer (i.e. monogram) or it may be to collect information data (i.e. lunch selection). The modifiers are used to collect additional information, not change the base product.

Both options and modifiers can change the base price of the product. Important to note: Inventory can be tracked through options, but not modifiers. Options are part of the initial product setup. Modifiers are added to the product after it has been added to the Store.

C. Creating the Product
Once you’ve thought about the above you can begin adding products. Products can be added to your Store one at a time or by building a product import file to add multiple products at the same time.
Product Settings

Add Product

Product creation settings. Payment methods are configured for the host system account in Payment Gateway.

Back To Products

Product Settings

<table>
<thead>
<tr>
<th>Product Name: (200 chars max)</th>
<th>Leadership Workshop</th>
</tr>
</thead>
</table>

Short Description: (500 chars max) (HTML Allowed)

Shoppers see this short product description in the detailed product layout. This field accepts a maximum of 500 characters. This field accepts HTML. Depending on the chosen store or category layout, shoppers may add some products to the cart without seeing the long descriptions. Put critical details in both the short description and the long description to make sure shoppers see this information.

Paint of Sale Description: (500 chars max) (No HTML Allowed)

Long Description: (30,000 chars max) (HTML Allowed)

Shoppers see this description when they go to a product detail page. Price and options (such as size and color) appear below the description on the product detail page. You may want to use the long description to provide shoppers with additional information about the available options. If the product requires special shipping information or if its return policy differs from the store policy, you can add those details here. Depending on the chosen store or category layout, shoppers may add some products to the cart without seeing the long descriptions. Put critical details in both the short and long descriptions to make sure shoppers see this information.

Product Type

- Generic
- Digital
- Donation

Should this be offered as an additional item at checkout?

- Yes
- No

Should this be offered only as an additional item at checkout? (Only if yes to question above)

- Yes
- No

Product Name

Shoppers see the product name when browsing in the site. It also appears in order and billing confirmations, Store financial reports, and fulfillment event records.

Short Description

Shoppers see this short product description in the detailed product layout (layout is selected under Store Categories). Depending on the chosen layout, shoppers may add some products to the cart without seeing the long descriptions. Therefore you want to ensure you include critical details in the short description as well as long description to make sure shoppers see this information.

In addition, for products that use the "Should this be offered as an additional item at checkout?" option, the short description will appear for shoppers on the "Additional Items" page, which is the first page of the checkout process when additional items are configured. Be sure to enter appropriate text in this field so that shoppers can make a good decision about whether to add the "additional item" to their shopping cart.
Long Description
Shoppers see this description when they go to a product detail page. Price and options (such as size and color) appear below the description on the product detail page. You may want to use the long description to provide shoppers with additional information about the available options. If the product requires special shipping information or if its return policy differs from the Store policy, you can add those details here.

Product Type
- Generic: This product type encompasses a wide range of products. This can be physical products that require shipping (or pickup by the customer), or they may also be conference/seminar registrations.
- Digital: A digital product (e.g., a PDF, an audio file, a video file, a Flash presentation, a Microsoft PowerPoint presentation, etc.) that can be downloaded by the customer. Typically, these products do not require shipping; however, it is possible to use this product type to create a digital product and also request a shipping address so that a physical copy of the file (or a related product or document) could be shipped to the customer. Before you select Digital as the Product Type, you must ensure that a shipping class has been created that is appropriate for digital products. For example, in many cases you'll need a shipping class of "none."
- Donation: If you select Donation as the Product Type, you need to ensure that a shipping class has been created that is appropriate for donations (i.e. “none”).

Should this be offered as an additional item at checkout?
If you choose Yes for this option, any shopper who places a product from this Store in their shopping cart and then initiates the checkout process will see an additional page at the beginning of the checkout process. This page will provide the shopper with the option of adding the product that you are now creating to their cart. By offering your shoppers additional items during checkout, you can help increase revenue by bringing special items to the attention of your customers.

Should this be offered only as an additional item at checkout?
(Only available if you chose Yes for the previous option.) If you choose Yes for this option, then this product will ONLY be available as an additional item during the checkout process. In other words, shoppers will not see the product on Store pages or product category pages; the product will only be available once the checkout process has been initiated and the shopper has at least one item from this Store in their cart.
Price
Enter the base price for the product. (Note: Can be configured as $0)

Donation Amount
- User entered amount: Select this checkbox to display a field to the donor in which they can enter a specific donation amount.
- Minimum user amount: The default minimum user amount is $0.01. This is the amount that will be used if you make no entry in this field. However, you can enter a value of $0 or greater in this field.
- 1: Select this checkbox to provide donors with a set donation amount that they can choose by selecting a radio button. Enter the donation amount in the field below the checkbox. Add more preset donation amounts by selecting the Add More Selections button.
- Donation Text: You can add label text to each donation amount. For example, if each donation amount (as set above) represents a particular contribution level, you can add a contribution level description to each pre-set donation amount by making entries in the Donation Text column. For example, you might set up the donation levels of Friend ($30), Partner ($50), and Champion ($100).

Allowed Payment Methods
Choose the allowed payment methods for this product. Available payment methods are set at the Mall level by Cash Operations. Please contact Cash Operations at marketplace@uconn.edu to have payment methods added or removed for your Store. Available options in Marketplace are: Credit/Debit Cards (Visa, Discover, MasterCard, American Express) and ACH/eCheck.

Important! If you do not choose any payment methods, the product will not be displayed to shoppers. For the product to be displayed, you must choose at least one payment method.

Days fulfill must wait before fulfilling order paid via ACH
Enter the number of days to wait before fulfilling an order paid for using the ACH (webCheck) payment method. The waiting period allows time for Payment Gateway to return any notice that the ACH payment was rejected. Note: It can take up to 7 business days for ACH payments to be returned back to the University.

Important! If you enter a value greater than zero in the "Days to Wait" field and you also select the Auto Fulfill option (on the "Item for Sale" page of the Add Product process) then the Auto Fulfill selection is automatically overridden for ACH purchases and manual fulfillment is required.

Select Continue.
Miscellaneous Settings

As of March 2018
Shipping/Handling Message
This message will appear on the packing slip that is printed during the fulfillment process. This message can contain special handling instructions required for the shipping of this product.

Select Continue

Upload Image for Stores
It is your responsibility to ensure that you have all necessary rights for the images you upload. Images that you did not create (such as images on other web sites) are typically protected by copyright law and should not be uploaded for use in Marketplace unless you have received permission from the copyright holder.

Leadership Workshop : Add Product

Best results is using an image with the recommended W x H: 400 x 400 pixels

Select Continue
Options
Here you can setup options for your product such as size or color that the shopper must choose before adding the product to their shopping cart. This will default to “No”. Select “Yes” then Continue to add options.

Size and Color are default options, or you can add your own. Click Continue.
Add values for each option and indicate sort order. Click Continue.

### Values for the option: Size (At least one value must be entered)

<table>
<thead>
<tr>
<th>Value Name</th>
<th>Sort Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small</td>
<td>1</td>
</tr>
<tr>
<td>Large</td>
<td>2</td>
</tr>
</tbody>
</table>

Add

### Values for the option: Color (At least one value must be entered)

<table>
<thead>
<tr>
<th>Value Name</th>
<th>Sort Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue</td>
<td>1</td>
</tr>
<tr>
<td>Red</td>
<td>2</td>
</tr>
</tbody>
</table>

Add

### Values for the option: make your own (At least one value must be entered)

<table>
<thead>
<tr>
<th>Value Name</th>
<th>Sort Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>paint</td>
<td>1</td>
</tr>
<tr>
<td>pottery</td>
<td>2</td>
</tr>
<tr>
<td>music</td>
<td>3</td>
</tr>
</tbody>
</table>

Add

You will now go through each possible option for your item and set the pricing, stock number, inventory, etc. After making your selections click continue until you have customized all the options.

### Item for Sale Settings

<table>
<thead>
<tr>
<th>Item for Sale 1 of 12</th>
<th>id</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small : Blue : paint</td>
<td></td>
</tr>
<tr>
<td>Set with confirmation</td>
<td></td>
</tr>
</tbody>
</table>

**Settings**

- **Price:** $300.00
- **Stock Number (Maximum characters 30):** 5303162_1

- **Check if stock number is already assigned**
- **Limit Quantity:**
  - Yes, Maximum Per Order: (No)
  - No
- **Track Inventory:**
  - Yes, Initial Inventory: (No)
  - Disable this item when inventory reaches zero: (No)

- **Out of Stock Message (This message will appear if the item goes out of stock):**
  - (500 characters max)
  - (HTML Allowed)

- **Low Inventory Notification:**
  - Yes, Low Inventory Notification Quantity: (No)
- **Back Orderable:**
  - Yes (No)
- **Auto Fulfill:**
  - Yes (No)

- **Item for Sale is not available.**
Price
For each option combination, you can set a different price. For example, you might need to charge more for an extra-large shirt versus a small shirt (or more for a blue shirt than a white one). The price you enter on this page overrides the price that you entered on Step 1.

Stock #
You must enter a stock number. This number can be a UPC number or any other number of value to your store or organization. Click the Assign Random Number button to have Marketplace automatically assign a stock number. If you manually enter a stock number, you can have Marketplace check to determine if the stock number is already in use: select the "Check to see if stock number is already assigned" checkbox.

Limit Quantity?
(Generic and Donation only) Mark Yes to limit the quantity of the product that a shopper can purchase. If yes, enter the maximum order quantity.

Track inventory?
(Generic and Donation only) Mark Yes to track the product's inventory. If you select Yes, enter the initial inventory quantity. You can also select the "Disable this product when inventory reaches zero" checkbox. If you select this checkbox and the inventory reaches zero, customers will not be able to see the product. If instead you would like the product to remain enabled in this situation, do not select the "Disable this product when inventory reaches zero" checkbox and consider your selection for the Back Orderable field.

Back orderable?
(Generic and Donation only) Mark Yes if a shopper can order the product even when the quantity available is zero.

Upload product file
(Digital only) When you select this link, you can browse to a file and select it for upload. If you added options to the product (such as file format or file size, see Step 12 above), you'll be able to upload a different digital file for each combination of options.

Maximum times customer can request download?
(Digital only) This option can be used to restrict the total number of times a customer can download a digital file.

Time limit for downloading?
(Digital only) This option can be used to place a time limit—in days—on the period during which the digital product can be downloaded.

Auto fulfill?
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 used for products in which no shipping is involved, such as donations or digital products. It could also be used for some generic products (e.g., for conference registrations when no materials are shipped to the customer).

Note: (For donations only) In order for the recurring payments option to be available, the Auto Fulfill option must be set to Yes. In addition, the recurring payments options must also be selected in the store's general settings.
Item for Sale is not available
If an option combination (an "Item for Sale") is not valid for your store, or if a combination is not currently available, you can use this checkbox to disable the "Item for Sale." For example, a small blue sweatshirt IS available but a small white sweatshirt is NOT.

Note: By completing this page separately for each product option (or combination of options), you can set up different prices and inventory for each option (or combination of options). The "Item for Sale" column describes which option (or option combination) you are currently working on.

Product Notification
Notifications will be sent to these email addresses when the product is purchased. To enter multiple email addresses, use a comma to separate.

Select Save
By selecting Confirm, the product will automatically be available in the Store. If the product should not yet be ready for purchase, select “Set status to Disabled” and then click Confirm.

Leadership Workshop : Add A Product

Upon confirmation, product will be added to available products. Products are enabled by default. Enabled products are viewable in store.

Back To Products

To keep product from being viewable in stores, set status to Disabled:
Set status to Disabled: [ ]

Confirm  Cancel
Here, you can assign the product to either Mall Categories (setup at the Mall level by Cash Operations) or to Store Categories (as setup the Store level). Note: If you assign the product to both Store Home Page and another category, it will show in your Store twice. If using a customized category, you may want to remove Store Home Page.

You have successfully add a product to your Store! Continue to Modifying Product Options for further customizations, such as adding modifiers to collect information from the customer.
D. Editing Product Options & Adding Modifiers
To edit the product or add modifiers, navigate to the Products screen under your Store.

Products Screen
You can do a few things here by selecting the Settings toggle button, such as:

- Change Web Availability
- Assign/Remove Categories
- Social Media Management
- Schedule Price Update
- Delete Product
- Clone Product

To edit the settings of the product, select the product name. You can then go through and edit settings as needed. Important! Be sure to click Save under the Continue Shopping Button Settings section after making your edits!
Modifiers
A product modifier asks the customer for additional information about their order. For example, a modifier could be used to add a monogram to a shirt, or a modifier could be used to collect a lunch preference or a conference session selection. The modifier doesn’t change the stock number of the product, but it can setup to change the price. Note: You cannot cap the inventory of a modifier. For example, if the modifier is lunch select, you cannot cap the inventory of each lunch choice.

Modifiers are not part of the product setup. After selecting the product name, click on Add Modifier under General Settings.

Here you can setup the specific modifier. There are three types: Drop-Down, Text Entry, and Multiple Select Checkboxes. Select the Type name to add that modifier.
Type

- Drop-down Selection: The shopper is asked to make a selection from a drop-down list before they add the product to their shopping cart. For example, if the product is a conference registration, the shopper might be required to select a lunch preference. A separate price adjustment can be entered for each dropdown selection.

- Text Entry: The shopper is asked to enter a text response to a prompt. For example, if the product is a shirt, the shopper could use this field to enter the monogram that they would like to appear on a shirt. A price adjustment can be triggered if the customer makes an entry in the text field.

- Multiple Select Checkboxes: The shopper is asked to choose from multiple checkbox options. For example, the shopper might be able to add ingredients to a pizza by selecting these checkboxes. They can choose as many or as few of the options as they prefer. A separate price adjustment can be entered for each checkbox selection.

All three types of modifiers have a frequency option. This option comes into play when the customer orders the product and selects a quantity of two or more. If you select "Static" as the frequency, uStores will display the modifier field only once regardless of the quantity ordered. In contrast, if you select "Dynamic" as the frequency, uStores will repeat the modifier field for each quantity ordered. For example, if the product is an event registration, the customer might register multiple people to attend the event. You can use the Dynamic frequency option to repeat the modifier prompt and ask for a name and contact information (or any other information you desire) for each registrant.

Table Builder

After adding modifiers, you may choose to organize them using Table Builder. Table Builder organizes modifiers into a table format, making it more convenient for customers to enter information for multiple modifiers during the checkout process.

Leadership Workshop: Table Builder

<table>
<thead>
<tr>
<th>Back to Products</th>
<th>Back to Product Settings</th>
<th>Back to Manage Modifiers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table Builder</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Table Name:</td>
<td>Participant Information</td>
<td></td>
</tr>
<tr>
<td>Modifier:</td>
<td>Participant First and Last Name</td>
<td>Add Modifier to Table</td>
</tr>
<tr>
<td>Table Information</td>
<td>Name</td>
<td>Sort Key</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Section V: Orders

A. Order Search
To find details of a specific order, navigate to the Order Search screen. There are several fields that can be used to search for an order. Enter details and select Run Search.

Matching search results will appear. Click on the Order ID to view all order details.
B. Fulfilling an Order

To start the process of fulfilling an order, you must navigate to the Fulfillments page. Only users with the Fulfiller user role (including users with the Fulfiller with Cancel/Refunds Rights user role) will be able to navigate to the Fulfillments page. Notice that the number of orders pending fulfillment shows next to “Fulfill Orders”.

Pending Fulfillments

This section displays the total number of order fulfillments that need to be processed. You can select the Refresh Pending Fulfillments button to update this page with any additional orders that have been received since the page was first loaded.

Order Search

Select a value from the filter field (Pending, Order Date, Fulfilled Date, Recur Order Date, Recur Payment Date). Then enter search date range and click Search. Alternatively, you can search by the Order Number. Note: Page will default to all Pending Orders.

Pending Fulfillments

This section displays all the orders that meet the search criteria. When the Fulfillments page first displays, all pending orders are displayed. The results can be sorted by using the up and down arrows in the Order Number, Order Date, Delivery Method, and Payment Method column headers. Select order that you have fulfilled and click Process Fulfillment.

Select the order you want to fulfill, then click Process Fulfillment. Note: Orders that are still subject to the waiting period for ACH payments can only be fulfilled by a user with the “Fulfiller with Cancel/Refunds Rights” user role. It’s recommended that you do not attempt to fulfill more than 20 orders at a time as the browser may time out and the fulfillment page may not update properly.

1. Review the displayed order information. Then select Process Fulfillment.
(2) Select Print Packing List, which will launch a new browser window which contains packing lists for all orders that you are fulfilling. Each packing list will print on a separate page. Then select Proceed to Step 3. Note: If you choose not to print the packing list now, you can go back to the Fulfillment page to search for the order and print later.
(3) Enter a Tracking Number, if applicable, then select Proceed to Step 4. Note: If you choose to leave the tracking number blank now, you can go back to the Fulfillment page to search for the order and add later.

Office of the Registrar Fulfillment

Enter a shipment tracking number if needed. Then, continue to step 4 to send an e-mail to the customer.

1. Process Fulfillments  
2. Print Packing List  
3. Shipment Tracking Number  
4. Email Buyer

Order Info:  
Order #26  
03/09/2018 06:13:32 PM EST  
US mail  
Alyse Kwapien  
eye.i.kwapien@uconn.edu  
Alyse Kwapien  
233 Glenbrook Road  
Storrs, CT 06269-4100  
United States

<table>
<thead>
<tr>
<th>Item</th>
<th>Stock #</th>
<th>Quantity Fulfilled</th>
</tr>
</thead>
<tbody>
<tr>
<td>Replacement Diploma</td>
<td>3723752</td>
<td>1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Option</th>
<th>Stock Description</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Option)</td>
<td>Standard or Expedited Delivery: Standard (2-3 weeks)</td>
<td></td>
</tr>
<tr>
<td>(Option)</td>
<td>PeopleSoft/Student Admin ID (if known): 13773588</td>
<td></td>
</tr>
<tr>
<td>(Option)</td>
<td>Date of Birth (MM/DD/YYYY): 11/01/1988</td>
<td></td>
</tr>
<tr>
<td>(Option)</td>
<td>Name on Student Record (First Middle Last): Alyse H Lofman</td>
<td></td>
</tr>
<tr>
<td>(Option)</td>
<td>Name as you wish to appear exactly on diploma: Alyse Lofman-Kwapien</td>
<td></td>
</tr>
<tr>
<td>(Option)</td>
<td>Degree Awarded: Bachelor of Science</td>
<td></td>
</tr>
<tr>
<td>(Option)</td>
<td>Major/Field of Study: Accounting</td>
<td></td>
</tr>
<tr>
<td>(Option)</td>
<td>Date of Graduation: May 2010</td>
<td></td>
</tr>
<tr>
<td>(Option)</td>
<td>I confirm that the above information is true and accurate: I confirm</td>
<td></td>
</tr>
</tbody>
</table>
(4) Select Send Email to send a shipment confirmation to each customer. For donations, you will have the option to skip sending an e-mail message. Note: Wording for the shipment email is setup at the Store level.

You have now completed fulfilling the order. Select Continue to return back to the Fulfillment screen, or navigate to a different menu option.
The order now shows as Completed in the Fulfillment screen.

C. Cancelling an Order
Only users with the Fulfiller with Cancel/Refund Rights role can perform this task. To cancel an order, follow steps for fulfilling an order above. On Step (1) Process Fulfillment, change the quantity to zero. After adjusting, select Update Quantity. The customer will be notified that the order was cancelled via email. (Note: If changing quantity to anything other than zero, the customer will not receive a notification).

D. Issuing a Refund
A fulfiller with refund/cancel rights can process refunds for completed orders. A refund will credit payment card purchases back to the buyer’s payment card and ACH purchases back to the buyer’s bank account. The fulfiller can decide how much to refund to the customer, up to the amount of the original purchase. Shipping costs can also be refunded.

Navigate to the Fulfill Orders screen, search for the order you wish to refund, and select View.

Scroll through the order details to the Process Refund section. If partial refunds are allowable (set at the Store level), then the Amount field will be editable. Adjust the Amount you wish to refund and adjust the New Quantity to Return to reflect the number of items that are being returned.

Note: You cannot issue a refund if Quantity is kept at zero. Even if a physical item is not being returned, you will need to adjust the Quantity. If you elected to track inventory for the product, you will need to correct the current inventory on the product screen when a refund is issued but a product is not actually being returned.

Select Process Refund to issue a credit back to the original source of payment. An email will be sent to notify the customer. Email message can be customized at the Store level.
As of March 2018

Notice that the refund and return is now reflected for this order.
Section VI: Reconciliation

A. Department’s Responsibility
Although Cash Operations will manage the process that records Marketplace transactions into KFS, it is the department’s sole responsibility to ensure funds are being recorded properly and accurately. To do this, it is recommended that departments reconcile Marketplace reports to KFS on at least a weekly basis. In the event that money is improperly recorded, it is the department’s responsibility to correct within KFS and adjust Accounting Codes in Marketplace to ensure future payments are deposited properly. There are a variety of reports available in Marketplace to assist departments with their reconciliation.

B. Available Reports

To use Marketplace reports, click the Marketplace Reports link in the left navigation menu. Once you click the Marketplace Reports link, four submenu selections appear: Marketplace, Merchant Revenue, Stores, and uPay Sites.

These four submenus contain the following report selections:

<table>
<thead>
<tr>
<th>Report Submenu</th>
<th>Available Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketplace</td>
<td>Revenue by Merchant, Revenue by Accounting Code, Revenue by Payment Type, By Product, Taxes, User Roles</td>
</tr>
<tr>
<td>Merchants</td>
<td>Merchant Revenue Report, Taxes, User Roles</td>
</tr>
</tbody>
</table>

Administrators, Chief Administrators, and Mall-level Accountants can run these reports (Cash Operations)

Merchant Managers can run these reports
### Marketplace Reports

Marketplace Reports are run at the Mall level and can only be run by Cash Operations. These reports will be used to enter the daily KFS edocs as well as complete the monthly billing of the credit card processing fees.

### Merchant Reports

Several reports are available that summarize Marketplace commerce activity for merchant managers.

You can customize each report by changing the date criteria. To search by a specific date range, enter a new start date and end date. You can either enter the date that you desire or use the calendar button to select a date. If you enter a new start or end in the date fields, be sure to enter the dates in mm/dd/yy format. You can also select the hour and minute.

You can export—in CSV format—the activity displayed in Marketplace reports. Each report has an Export to CSV button. When you click this button, you’ll be prompted to select a location for saving the CSV file.
Merchant Revenue Report
Merchant Managers can view the Merchant Revenue Report. This report shows transaction totals for a merchant, as well as totals for each uStore and uPay site that have been established for that merchant.

Merchant Revenue Report
The default report shows current day information using the default of all application types. Totals can be separated and summarized using the available application types.

Export To CSV
From: 01/01/18 12:00 AM To: 03/06/18 11:59 PM

Application Type:
- uStores
- uStores Mobile
- Point of Sale
- uPay
- uPay Mobile

Stores Revenue
<table>
<thead>
<tr>
<th>Store ID</th>
<th>Store Name</th>
<th>Number of Fulfillments</th>
<th>Number of Items Sold</th>
<th>Total Items Amount</th>
<th>Total Shipping Amount</th>
<th>Total Item + Shipping Amount</th>
<th>Total Tax Collected</th>
<th>Total Amount with Tax</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>This Event 2018</td>
<td>1</td>
<td>1</td>
<td>$300.00</td>
<td>$5.00</td>
<td>$305.00</td>
<td>0.00</td>
<td>$305.00</td>
</tr>
<tr>
<td>Total:</td>
<td></td>
<td>1</td>
<td>1</td>
<td>$300.00</td>
<td>$5.00</td>
<td>$305.00</td>
<td>0.00</td>
<td>$305.00</td>
</tr>
</tbody>
</table>

uPay Revenue
There is no revenue on record for the selected time period and/or application type.

Merchant Tax Report
Merchant Managers can review the Merchant Tax Report. This report shows a summary of activity by accounting code for all uStores and uPay sites for a single merchant. This report can be displayed with or without the Accounting Code column.

Tax Report
The default report shows current day information.

Export To CSV
From: 06/07/17 12:00 AM To: 06/07/17 11:59 PM

<table>
<thead>
<tr>
<th>Rate (%)</th>
<th>State</th>
<th>City</th>
<th>County</th>
<th>Total Taxable Sales</th>
<th>Total Shipping Totals</th>
<th>Gross Taxable Sales</th>
<th>Tax Collected</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.0875</td>
<td>KS</td>
<td>Lenexa</td>
<td>Johnson</td>
<td>$3,000.00</td>
<td>$43.00</td>
<td>$3,043.00</td>
<td>$266.26</td>
</tr>
<tr>
<td>Totals:</td>
<td></td>
<td></td>
<td></td>
<td>$3,000.00</td>
<td>$43.00</td>
<td>$3,043.00</td>
<td>$266.26</td>
</tr>
</tbody>
</table>
User Roles Report
Merchant Managers can run the User Roles Report. This report shows a list of all assigned user roles for this merchant—merchant managers, store managers, uPay site managers, store clerks, store accountants, Point-of-Sale attendants, fulfillers, payment clerks, and site accountants.

### User Roles

<table>
<thead>
<tr>
<th>Role Name</th>
<th>External Id</th>
<th>User Name</th>
<th>Merchant Id</th>
<th>Merchant Name</th>
<th>Store Id</th>
<th>Store Name</th>
<th>Upay Site Id</th>
<th>Upay Site Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Merchant Manager</td>
<td>C21646.alofman</td>
<td>Alyse Lofman</td>
<td>0</td>
<td>Animal Science</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Merchant Manager</td>
<td>C21646.hhesse</td>
<td>Hayley Hesse</td>
<td>0</td>
<td>Animal Science</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Merchant Manager</td>
<td>C21646.jlavigne</td>
<td>Jeanine Lavigne</td>
<td>0</td>
<td>Animal Science</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Merchant Manager</td>
<td>C21646.lapointea</td>
<td>Aaron LaPointe</td>
<td>0</td>
<td>Animal Science</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Merchant Manager</td>
<td>C21646.mselleck</td>
<td>Peggy Selleck</td>
<td>0</td>
<td>Animal Science</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Merchant Manager</td>
<td>C21646.smanis</td>
<td>Sherri Manis</td>
<td>0</td>
<td>Animal Science</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Merchant Manager</td>
<td>C21646.tadmin</td>
<td>tadmin</td>
<td>0</td>
<td>Animal Science</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Store Manager</td>
<td>C21646.alofman</td>
<td>Alyse Lofman</td>
<td>2</td>
<td>AMSC CT Horse Symposium</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Store Manager</td>
<td>C21646.tadmin</td>
<td>tadmin</td>
<td>1</td>
<td>AMSC Horse Practicum and Riding Lessons</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>uPay Site Manager</td>
<td>C21646.alofman</td>
<td>Alyse Lofman</td>
<td>0</td>
<td>TEST</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>uPay Site Manager</td>
<td>C21646.tadmin</td>
<td>tadmin</td>
<td>0</td>
<td>TEST</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Store Reports
Several reports are available that summarize Marketplace commerce activity for merchant managers, store managers, and accountants.

You can customize each report by changing the date criteria. To search by a specific date range, enter a new start date and end date. You can either enter the date that you desire or use the calendar button to select a date. If you enter a new start or end in the date fields, be sure to enter the dates in mm/dd/yy format. You can also select the hour and minute.

You can export—in CSV format—the activity displayed in Marketplace reports. Each report has an Export to CSV button. When you click this button, you’ll be prompted to select a location for saving the CSV file.
Store Revenue Report
The Store Revenue Report can be displayed by product, stock number, product type (generic, donation, or digital), and totals. This report and its four varieties are available for a store’s store managers and merchant managers, as well as store accountants.

When displayed by Product, the report lists all the products that have sold during the displayed date range.

You can change the date range as required.
On all Store Revenue Reports, each product name is linked to a corresponding Product Detail Report that gives additional information about the revenue associated with an individual product. You can click on the Product name to view details for individual products.

<table>
<thead>
<tr>
<th>Product Name</th>
<th>Order Id</th>
<th>Terminal Id</th>
<th>Purchaser</th>
<th>Date Ordered</th>
<th>Date Fulfilled</th>
<th>Qty Fulfilled</th>
<th>Payment Method</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hat : Youth - One Size Fits Most : Blue</td>
<td>20</td>
<td>N/A</td>
<td>Sherri Manis</td>
<td>03/01/2018 02:56:25 PM CST</td>
<td>03/02/2018 07:32:17 AM CST</td>
<td>1</td>
<td>Visa</td>
<td>$20.00</td>
</tr>
<tr>
<td>Hat : Youth - One Size Fits Most : Blue</td>
<td>15</td>
<td>N/A</td>
<td>Sherri Manis</td>
<td>01/26/2018 08:53:26 AM CST</td>
<td>01/26/2018 09:13:05 AM CST</td>
<td>1</td>
<td>Visa</td>
<td>$18.00</td>
</tr>
</tbody>
</table>

Or select multiple products and click View Multiple Item Detail Report to view multiple products at once.

<table>
<thead>
<tr>
<th>Product Name</th>
<th>Quantity Sold</th>
<th>Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corn Hole</td>
<td>2</td>
<td>$200.00</td>
</tr>
<tr>
<td>Sweatshirt</td>
<td>2</td>
<td>$90.00</td>
</tr>
<tr>
<td>Hat</td>
<td>2</td>
<td>$38.00</td>
</tr>
<tr>
<td>UConn Fight Song</td>
<td>1</td>
<td>$1.99</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>7</strong></td>
<td><strong>$329.99</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Product Name</th>
<th>Order Id</th>
<th>Terminal Id</th>
<th>Purchaser</th>
<th>Date Ordered</th>
<th>Date Fulfilled</th>
<th>Qty Fulfilled</th>
<th>Payment Method</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hat : Youth - One Size Fits Most : Blue</td>
<td>20</td>
<td>N/A</td>
<td>Sherri Manis</td>
<td>01/24/2018 03:00:45 PM CST</td>
<td>01/24/2018 03:00:46 PM CST</td>
<td>1</td>
<td>MasterCard</td>
<td>$1.99</td>
</tr>
<tr>
<td>Hat : Youth - One Size Fits Most : Blue</td>
<td>15</td>
<td>N/A</td>
<td>Sherri Manis</td>
<td>01/24/2018 08:53:26 AM CST</td>
<td>01/24/2018 09:13:05 AM CST</td>
<td>1</td>
<td>Visa</td>
<td>$18.00</td>
</tr>
<tr>
<td>UConn Fight Song</td>
<td>5</td>
<td>N/A</td>
<td>Sherri Manis</td>
<td>01/24/2018 03:00:45 PM CST</td>
<td>01/24/2018 03:00:46 PM CST</td>
<td>1</td>
<td>MasterCard</td>
<td>$1.99</td>
</tr>
</tbody>
</table>
Revenue by Stock Number – shows all products (by stock number) sold in selected date range

**Store Revenue Report**

The default report shows current day information using the default of all application types. The report is a summary of the total revenue.

Export To CSV

From: 01/01/18 12:00 AM  To: 03/08/18 11:59 PM  Report Type: Stock No.  View

**Application Type:**
- uStores
- uStores Mobile
- Point of Sale

View Multiple Product Detail Report

<table>
<thead>
<tr>
<th>Stock No.</th>
<th>Item Name</th>
<th>Quantity Sold</th>
<th>Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>3512220</td>
<td>Corn Hole</td>
<td>2</td>
<td>$200.00</td>
</tr>
<tr>
<td>5463743_1</td>
<td>Sweatshirt : Small</td>
<td>2</td>
<td>$90.00</td>
</tr>
<tr>
<td>6471411_1</td>
<td>Hat : Youth : One Size Fits Most: Blue</td>
<td>2</td>
<td>$38.00</td>
</tr>
<tr>
<td>3138648</td>
<td>UConn Fight Song</td>
<td>1</td>
<td>$1.99</td>
</tr>
<tr>
<td></td>
<td><strong>Total:</strong></td>
<td><strong>7</strong></td>
<td><strong>$329.99</strong></td>
</tr>
</tbody>
</table>

Revenue by Product Type (generic, donation or digital) – shows total amount paid and the number sold by each product type.

**Store Revenue Report**

The default report shows current day information using the default of all application types. The report is a summary of the total revenue.

Export To CSV

From: 01/01/18 12:00 AM  To: 03/08/18 11:59 PM  Report Type: Product Type  View

**Application Type:**
- uStores
- uStores Mobile
- Point of Sale

<table>
<thead>
<tr>
<th>Product Type</th>
<th>Quantity Sold</th>
<th>Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generic</td>
<td>6</td>
<td>$328.00</td>
</tr>
<tr>
<td>Digital</td>
<td>1</td>
<td>$1.99</td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td><strong>7</strong></td>
<td><strong>$329.99</strong></td>
</tr>
</tbody>
</table>

As of March 2018
Revenue by Totals – shows total amounts collected for fulfillments and items sold.

Store Revenue Report

The default report shows current day information using the default of all application types. The report is a summary of the total revenue.

Export To CSV

From: 01/01/18 12:00 AM To: 03/08/18 11:59 PM

Application Type:
- uStores
- uStores Mobile
- Point of Sale

<table>
<thead>
<tr>
<th>Store Name</th>
<th>Number of Fulfillments</th>
<th>Number of Items Sold</th>
<th>Item Amount</th>
<th>Shipping Amount</th>
<th>Item + Shipping Amount</th>
<th>Tax Collected</th>
<th>Total Amount with Tax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Activities</td>
<td>5</td>
<td>7</td>
<td>$329.99</td>
<td>$5.00</td>
<td>$334.99</td>
<td>$0.00</td>
<td>$334.99</td>
</tr>
</tbody>
</table>

Store Tax Report

Merchant Managers, Store Managers, and Store Accountants can view the Store Tax Report. This report shows a summary of activity by accounting code for an individual store. The report can be displayed with or without the Accounting Code column. You can use the Include/Exclude Account Codes dropdown menu to determine whether the Accounting Code column will be displayed.

Tax Report

The default report shows current day information.

Export To CSV

From: 06/08/17 12:00 AM To: 06/08/17 11:59 PM

<table>
<thead>
<tr>
<th>Rate (%)</th>
<th>State</th>
<th>City</th>
<th>County</th>
<th>Total Taxable Sales</th>
<th>Shipping Totals</th>
<th>Gross Sales</th>
<th>Taxable Sales</th>
<th>Tax Collected</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.0875</td>
<td>KS</td>
<td>Lenexa</td>
<td>Johnson</td>
<td>$1,187.47</td>
<td>$27,530.00</td>
<td>$28,717.47</td>
<td>$28,717.47</td>
<td>$2,512.78</td>
</tr>
<tr>
<td>Totals:</td>
<td></td>
<td></td>
<td></td>
<td>$1,187.47</td>
<td>$27,530.00</td>
<td>$28,717.47</td>
<td>$28,717.47</td>
<td>$2,512.78</td>
</tr>
</tbody>
</table>
Buyer Information Report

The Buyer Information Report shows the user modifier selections made by each customer.

Recurring Payment Group Report

The Recurring Payment Group Report contains two tables. The table at the top of the report shows totals for all recurring payments that were processed during the selected date range. The second table shows all recurring payment schedules for which payments were processed during the selected date range.

The Installments column shows the number of payments that were processed for each recurring payment schedule. For example, if this column shows "3 of 13," this means three recurring payments were processed during the selected date range, and the recurring payment schedule includes a total of 13 payments.
You can view additional information on recurring payments on the Store Recurring Payment Detail Report by clicking the System Tracking ID number.

On the Detail Report, you can view scheduled recurring payments by selecting a future date range that includes the scheduled payments. The Status column shows payments that have been processed ("Success") and payments that are scheduled to be processed in the future ("Not Processed").
In this case, assume the above screen shot was captured on 12/14/2011. Therefore, installment 580 on 12/14/11 has been processed and shows a status of "Success," while installments 581 through 587 are scheduled for future dates and show a status of "Not Processed."
User Roles Report
Merchant managers and store managers can open the User Roles Report.

This report shows a list of all assigned user roles for this store—store managers, store clerks, store accountants, Point-of-Sale attendants, and fulfillers.

User Roles

<table>
<thead>
<tr>
<th>Role Name</th>
<th>External Id</th>
<th>User Name</th>
<th>Store Id</th>
<th>Store Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filler</td>
<td>C21646.hhesse</td>
<td>Hayley Hesse</td>
<td>6</td>
<td>This Event 2018</td>
</tr>
<tr>
<td>Filler</td>
<td>C21646.smannis</td>
<td>Sherri Manis</td>
<td>6</td>
<td>This Event 2018</td>
</tr>
<tr>
<td>Store Clerk</td>
<td>C21646.hhesse</td>
<td>Hayley Hesse</td>
<td>6</td>
<td>This Event 2018</td>
</tr>
<tr>
<td>Store Clerk</td>
<td>C21646.smannis</td>
<td>Sherri Manis</td>
<td>6</td>
<td>This Event 2018</td>
</tr>
<tr>
<td>Store Manager</td>
<td>C21646.jlavigne</td>
<td>Jeannine Lavigne</td>
<td>6</td>
<td>This Event 2018</td>
</tr>
<tr>
<td>Store Manager</td>
<td>C21646.smannis</td>
<td>Sherri Manis</td>
<td>6</td>
<td>This Event 2018</td>
</tr>
</tbody>
</table>

The report is initially sorted by Role Name (the far left column); however, you can select the arrows in the column headers to choose a different sorting method.

You can export this report in CSV format.

Section VII: Resources

A. Designated email: marketplace@uconn.edu

B. Resources on Cash Operations website: https://bursar.uconn.edu/cash-operations-3/

C. Main Contacts: Sherri Manis, Alyse Lofman-Kwapien

D. Logging into Marketplace Operations Center: https://secure.touchnet.com/ucommercecentral
   Login username will always begin with c21646.