CU Marketplace is currently providing over Clemson departments with online business opportunities.
# CU Marketplace Manual

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About Marketplace

The E-Commerce unit of the Cash and Treasury Services Department strives to provide Clemson University departments with a secure and convenient way to extend their business operations to the World Wide Web. Our goal is to provide a secure environment that allows buyers and sellers to connect electronically, making it easy for students, parents, alumni, and the community to do business with Clemson.

Marketplace, hosted by TouchNet Information Systems, Inc., will serve as the University’s main E-Commerce service provider. The use of Marketplace helps us to accomplish our mission by providing an E-Commerce solution that is Payment Card Industry (PCI) compliant. It is both secure and cost-effective, and allows departments to easily operate online storefronts to sell products or accept online payments.

Please review our features on the next page of this document and allow us to show you all that Marketplace has to offer. E-commerce is growing rapidly throughout the world and we want to ensure that Clemson is not left behind.
Marketplace Features

Payments

- Available Payment Types:
  - All major credit cards (MasterCard, Visa, Discover, American Express)
  - Debit cards with a MasterCard or Visa logo
  - Electronic checks
- Verifies the credit card number, expiration date, and available funds
- PCI compliant payment
- Departments never see the credit card number
- Ability to take $0 payments

Accounting

- Automatic upload to PeopleSoft
- Separate chart field strings for each product
- Eliminates the need for receipt transmittals and web departmental deposits
- Creates MCR journal ID entries

Customer Information

- Variety of information gathering options
  - Text entry (optional or required)
  - Drop down selection (required)
  - Checkbox selection (optional)
  - Ability to collect virtually any customer information you would like using the methods above

Dynamic pricing

- Create price increases or decrease based on the options selected
- Price can vary based on options selected (Ex. Registrant type, t-shirt size, etc.)
Checkout

- Ability to allow customers to become a registered user
  - Saves shipping information
  - Saves billing information
  - Saves payment information
  - Provides order history
  - This feature is optional and can be hidden
- Promotional Codes ($ or % off)
- Ability to offer optional items at checkout
- Ability to collect other customer information
- Calculates sales tax automatically based on zip + 4
- Calculates shipping rates based on rates given by department

Customer Communications

- System sends automatic emails
  - Order confirmation
  - Order fulfillment (i.e. notice that goods were shipped)
  - Cancellation
  - Refund
  - Ability to send these communications via text message as well

Shipping

- Rates set by the department
- Ability to add additional charge per item
- Shipping cost captured at checkout
- Printable packing list available
- Customer can be sent a tracking number
- Ability to ship internationally and limit where items can be shipped
Reports

- Real-time reports
- Reports include all information entered by the customer except billing information
- Ability to pull high-level and transactional reports
- All reports are exportable to excel
- Ability to pull multiple product reports at one time

Cost

- No set up fee
- No maintenance fee
- Only fees are credit card processing fees
  - Visa – 1.43% of revenue
  - MasterCard – 1.53% of revenue
  - Discover – 1.85% of revenue
  - American Express – 2.15% of revenue
- These are base rates, actual fees fluctuate based on the interchange fees applied
- Credit card fees are processed monthly with a journal entry by Cash and Treasury Services to the chart field string that you designate

Layout

- Customizable images
- Customizable store and product descriptions
- General layout customization also available

Miscellaneous

- Ability to bring products or stores offline and back online quickly
- Changes can be made with no downtime
- Mobile optimized version is included
- Ability to set inventory for products (i.e. limit number of registrants or merchandise available for sale)
- Downloadable QR codes
- Departments able to do refunds
  - Refunds can be full or partial refunds
  - Refunds are made to the same payment method as the original payment
Marketplace User Guide

Fulfilling an Order

1. Log in to U.Commerce Central

2. Hover over the Applications tab
3. Navigate to Marketplace

![Image of the TouchNet U.COMMERCE Central platform]

4. Click on the number under the “Fulfillments Pending” column

![Image showing the fulfilling pending status in the gallery]

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User Information:
- **User Name:** creighs
- **Last Logged In:** 04-17-2014 08:06:00 EST
- **Current Location:** 130.127.158.292

User Expiration Warning:
- Your password is set to expire in: **54 Days**
5. Check the box of the order desired to fulfill
   a. You are able to check more than one box at a time

6. Click “Process Fulfillment”
7. Click “Ok” when asked if you want to fulfill these shipments

8. Click “Accept Payment”
9. Click “Ok” when asked if you are sure that you want to charge the customer.

10. Click “Print Packing List”

Note: Skip to Step 12 if you do not wish to print a packing list.
11. Click “Print”

12. Click “Proceed to Step 3”
13. Enter a tracking number

Note: Entering a tracking number is optional. Skip to Step 14 if you do not have a tracking number.

14. Click “Proceed to Step 4”
15. Click “Send Email”

Note: Sending an email to the customer is optional. If you do not want to contact the customer, click “Back to Fulfillment List”.

16. Click “Continue”
Cancelling an Order

1. Repeat steps 1-6 on “Fulfilling an Order” Section
2. Change the “Fulfillment Quantity” to 0

Note: The system will not allow you to increase the quantity. The customer would have to make another order.

3. Click “Update Quantity”
4. Click “Ok” when asked if you’re sure you want to update the order quantities for this shipment

Note: The customer will automatically receive a system generated order cancellation notice.
Processing a Refund

1. Log in to U.Commerce Central

2. Hover over the Applications tab
3. Navigate to Marketplace

4. Click the number under the “Fulfillments Pending” Column
5. Search by date range

6. Change “Pending” to “Order Date”
7. Click “Search”

8. Look for the Buyer Name
9. Click “View”

10. Select Quantity to Return
11. Enter the Refund Amount

Note: If refunding a whole dollar amount, it is not necessary to input decimals (Ex. Input $240 instead of $240.00). The refund amount cannot exceed the total amount paid by the customer. Partial refunds can be given. All refunds will be applied to the original method of payment.

12. Click “Process Refund”
13. Click “Ok” when asked if you want to continue

Note: The system will automatically send an email to the customer notifying them of the refund. Refunds will take approximately 3-5 business days to show up in the customer’s account. Any purchase made through Marketplace must be refunded using the steps outlined above.
Printing a Duplicate Receipt

1. Navigate to Fulfillments Page (See Steps 1-4 of “Fulfilling an Order”)

2. Enter desired date range
3. Change “Pending” to “Order Date”

4. Click “Search”
5. Click “View” next to the desired order

6. Click “Print Page”
7. Click “Print”
Sending Automatic Emails

1. Log in to U.Commerce Central

2. Hover over the Applications tab
3. Navigate to Marketplace

4. Click “Edit my Profile”
5. Check the box next to your store name

6. Click “Update Notifications”

Note: Automatic order notification emails will be sent to the email address provided while the box is checked. To stop receiving order notification emails, uncheck the box and click “Update Notifications”.
Running a PeopleSoft Query

1. Navigate to PeopleSoft

2. Click “Query”

Note: If you do not see “Query” in you navigation pane, please contact your college Business Officer for query access.
3. **Search By Query Name**

4. Type “Marketplace” without quotation marks in the search box
5. Click “Search”

6. Click “Run to Excel”
7. Enter the desired date range

```

From: [ ]
To: [ ]
```

Click "View Results"

```

From: [ ]
To: [ ]
```

Click "View Results"

```

From: 06/10/2014
To: 06/18/2014
```

Click "View Results"

```
```

8. Enter your department number

```
```

Click "View Results"

```
```

Click "View Results"

```

From: [ ]
To: [ ]
```

9. Click “View Results”

```
```

Click "View Results"

```
```

10. Open the excel document

```
```

Click "View Results"

```
```

Click "View Results"

```
```

Click "View Results"

```
```

Click "View Results"

```
```
Pulling a Totals Report

1. Log in to U.Commerce Central

2. Hover over the Applications tab
3. Navigate to Marketplace

4. Click “Marketplace Reports” on the left side of your screen
5. Click “Stores”

6. Select your store
7. Click “Totals”

8. Change the date range to the desired state and click “View”
9. Click “Export to CSV”
Reconciling Your Account

1. Pull a Totals Report (See “Pulling a Totals Report”)

2. Export to CSV

3. Save as Rev by Acct Code (From Date Range) to (To Date Range)
   a. For Example, If we pulled date from 6/2/14 to 6/6/14, our file name would be: “Rev by Acct Code 6-2-14 to 6-6-14”

4. Run a PeopleSoft Query (See “Running a PeopleSoft Query”)

5. Open the Excel document

6. Total all of the transactions

7. Save as “PeopleSoft Query (From Date Range) to (To Date Range)
   a. For Example, if we pulled data from 6/2/14 to 6/6/14, our file name would be “PeopleSoft Query 6-2-14 to 6-6-14”

Note: Marketplace revenues should be reconciled on a monthly basis. It may be necessary to reconcile more frequently (weekly or daily) dependent on sales volume.
Pulling a Product Report

1. Log in to U.Commerce Central

2. Hover over the Applications tab
3. Navigate to Marketplace

4. Click “Marketplace Reports” on the left side of your screen
5. Click “Stores”

6. Select your store
7. Click “By Product”

8. Change the date range to the desired state
9. Click “View”

10. Click on a listed product for more detailed information
    a. This option will show all of the information the customer entered
11. Click “Export to CSV”
What If I Forgot My Password?

1. Click “Forgot My Password”

2. Enter required information

3. Check your email for further instructions

Note: The system will lock you out after entering an incorrect password three or more times. Contact your Marketplace administrator at Marketplace@lists.clemson.edu if this occurs.
FAQs for Marketplace

Payments

1. **Are cash and personal checks accepted as payment methods?**

   Marketplace is an online system and therefore cannot accept cash as a payment method. Our customers cannot mail in physical checks; however, we gladly accept payment through personal e-checks that require the customer’s routing and account number.

2. **Is this website secure?**

   CU Marketplace is a TouchNet hosted solution that is secure and meets Payment Card Industry Data Security Standards. You can feel confident knowing that the site is completely PCI Compliant.

3. **What credit cards does the system accept?**

   CU Marketplace proudly accepts all major credit cards. These include:
   - Visa
   - MasterCard
   - Discover
   - American Express
   - And all of their subsidiaries

   Also, Marketplace accepts debit cards with a MasterCard or Visa logo.

4. **Are any of the credit card numbers saved?**

   A customer can choose to save their payment method after registering for an online profile. However, only the last four digits can be seen. Departments do not have access to any portion of the credit card number.

5. **What if no payment is required?**

   Our system has the ability to process $0 payments. This occurs when there is no fee for an event registration or when a promotional code brings the total amount to $0. No billing information will be collected for a $0 purchase.
Accounting

1. **Who handles all of the accounting duties?**

   Marketplace automates the process of accounting for revenues collected. Revenues are deposited into the chart field string of your choice nightly. This eliminates the administrative burden placed on individual departments. Reconciliation of Marketplace and PeopleSoft reports is the responsibility of the department collecting the funds.

2. **Do I have access to the accounting information?**

   Departments are able to access multiple Marketplace reports and PeopleSoft queries. Marketplace reports show all purchases in real-time, while PeopleSoft updates overnight and shows the dollar amount for purchases from the previous day.

Customer Information

1. **Can I collect additional customer information?**

   Yes. The department has the ability to gather as much information from the customer as they would like. Information requested can be required or optional. Our information gathering methods include textbox entries, drop-down selections, and multiple select checkboxes. Prices increases or decreases can be configured based on options selected.

2. **What is dynamic pricing?**

   Dynamic pricing allows the price options to fluctuate when different combinations of products are selected or when dates change. For example, an increase in price may occur if a customer would like to attend a banquet the night before a conference or if different prices are available for students versus employees.
Checkout

1. **Can a customer access their order history?**

   Only the individual who created the account has the ability to access purchase history. Cash and Treasury Services can only view orders and delete inactive accounts.

2. **Can promotional codes be used?**

   Marketplace is able to use (2) different types of promotional codes, unlimited use and single use. It is the responsibility of the department to determine which type best fits their needs and distribute the codes to their customers.

3. **Can additional items be offered at checkout?**

   Yes. The department has the ability to offer additional items at checkout. For example, a department can offer a customer the ability to purchase a T-shirt for a conference after registration.

4. **Will I have to calculate tax and shipping costs?**

   Sales tax is calculated by the system and, if applicable, is included in the final price of the product. Shipping costs must be determined by the department when their store or product is being created. The system will calculate shipping costs after they have been initially set. The customer will receive a breakdown of all costs on their checkout page.

5. **Can a customer print out a receipt?**

   Yes. The customer will have the ability to print a receipt after checkout is complete.

6. **Is the refund policy visible online?**

   Each department sets their refund policy individually. By submitting an order, the customer is agreeing to that refund policy.
Customer Communications

1. **Will the customer automatically receive an order confirmation?**

   After completing the buying process, the customer will be redirected to a confirmation page. The customer will also receive an email with their confirmation and receipt. Order confirmations can also be delivered via a text message if the customer chooses that option during checkout.

2. **Can additional information be sent to the customer?**

   Every department has the option to request a customer’s phone number or email address during the information gathering stage. This provides the ability for the department to send additional information to the customer, if they would like.

Shipping

1. **Who is responsible for setting the shipping rates for a product?**

   Individual departments set their own shipping rates during the product creation phase. A base rate must be provided and then an additional rate per additional product purchased can be set.

2. **Am I able to provide a tracking number with each shipment?**

   Yes. The department may provide a tracking number that will be emailed to the customer when the order is fulfilled.

3. **Can items be shipped internationally?**

   Yes. This is up to the discretion of the department and the policies set forth by the University. Shipping can be limited to specific countries.
Reports

1. **How do I access reports?**

   Marketplace reports are real-time and can be accessed through [U.Commerce Central](#). This will require login information, which is provided by the Cash and Treasury Services Department after the creation of your Marketplace store.

2. **What do the reports show?**

   There are (2) reports available. The Totals report shows overall revenue, and the By Product report gives all customer information, excluding credit card numbers.

3. **Can I receive an email every time an order is placed?**

   Yes. Marketplace offers this option upon completion of store setup. See “Sending Automatic Emails” for instructions.

Costs

1. **Is there a set-up fee to acquire a Marketplace store?**

   No. Store set-up is completely free.

2. **Are there credit card processing fees?**

   Yes. A credit card processing fee is the only charge associated with Marketplace.

   These fees fluctuate based on the interchange rate. Base rates are given below.
   
   - Visa-1.43% of revenue
   - MasterCard- 1.53% of revenue
   - Discover- 1.85% of revenue
   - American Express- 2.15% of revenue

   For more information contact Cathy Freeman at cdorfne@clemson.edu.

3. **Do I have to perform any actions in regards to managing these fees?**

   No. They are charged to the chart field string that has been provided to the Cash and Treasury Services Department.
Layout

1. **Is the department able to customize their store?**
   Image, text, and general layout customization is available.

Miscellaneous

1. **Can products come on and offline?**
   Products can be taken on and offline in real-time. The department needs to let the Cash and Treasury Services Department know when they would like this to occur.

2. **Do stores have to come offline for changes to be made?**
   No. Changes to any aspect of the store can be made while the store is still active.

3. **Can mobile payments be made?**
   Yes. The customer would have the ability to make payments after being redirected to a mobile optimized site.

4. **Can QR codes be created?**
   Yes. QR codes are able to be created for each product.

5. **Do I have the ability to give refunds?**
   Yes. Departments are able to process their own refunds. The refund is processed to the same payment method as the original purchase. The chart field string associated with the original purchase will also be debited.

6. **Can the price of a product be changed?**
   Yes. This has to be changed manually during normal business hours.

7. **How long does it take for a store to be created?**
   Once all necessary forms have been received, it takes 2-3 weeks for a store to be created.

8. **How long does it take for a new product to be added to a store?**
   The average product takes 1-5 business days to be added to a store.
System Administration

1. **What if I forget my password?**
   Complete the steps in the “What if I Forgot My Password” section.

2. **What if I need to add a new employee to an account?**
   Contact [Marketplace@lists.clemson.edu](mailto:Marketplace@lists.clemson.edu)

3. **What if an employee leaves?**
   Contact [Marketplace@lists.clemson.edu](mailto:Marketplace@lists.clemson.edu)
Pre-Customer Checklist


☐ Complete CU Marketplace Application

☐ Complete Marketplace E-Commerce User Agreement

☐ Complete Credit Card Merchant Registration Form

☐ Once approved, send additional information to Cash and Treasury,
  - Product Images
  - Descriptions
  - Text
  - Shipping Information

☐ Cash and Treasury will create a test site for you

☐ Test the site and request changes as needed

☐ Approve your store for production

☐ Cash and Treasury will build your site in production, provide training, and send you the necessary URLs and login information

  This entire process will last anywhere from 10 days to 25 days

For any questions, consult the FAQs on the Marketplace Website

For further assistance, contact Marketplace@lists.clemson.edu
Existing Customers Checklist

☐ Review Reports
  o Ensure that you review all of the reports to which you have access.

☐ Reconcile Monthly
  o Cash and Treasury recommends that each department reconcile their reports at least monthly. Depending on the volume of sales transactions, it may be necessary to reconcile weekly or even daily.

☐ Open Budgets
  o Please contact your college Business Officer to ensure that all budgets are open for the new fiscal year.
  o Marketplace journals will not post for unopened budgets. This will cause a delay in your department receiving revenues.

☐ Fulfill Orders
  o Orders must be marked as fulfilled through TouchNet before they are deemed to be complete. This only applies to departments using manual fulfillments.

☐ Contact Cash and Treasury with Updates
  o If changes need to be made to your store, contact Marketplace@lists.clemson.edu.
  o Updates will be made during normal business hours.

☐ Check FAQs for Answers
  o Cash and Treasury Services has developed a specific list of frequently asked questions in order to provide our customers with the best service possible. Please utilize this list before contacting the department regarding questions.

☐ Provide Feedback
  o Feedback regarding CU Marketplace is always encouraged. Please do not hesitate to tell us when you have a positive or negative experience with the system. Contact Marketplace@lists.clemson.edu to leave feedback.