



Clemson University Marketplace uStore Implementation Guidelines



Background

Clemson University's Marketplace provides the Campus community with a secure and convenient way to extend their business operations to the World Wide Web. Marketplace is an E-Commerce solution, hosted offsite by our provider TouchNet Information Systems, Inc. The hosted application is a Payment Card Industry (PCI) compliant solution for accepting online payments. Marketplace provides a secure environment for buyers and sellers to connect electronically, making it easy for students, parents, alumni, and the community to do business with the University. Clemson's Marketplace allows the University to easily operate online storefronts to sell products or accept online payments with the review and approval of the Cash and Treasury Services Office.

Definitions

uStore - A shopping cart application that allows customers to purchase items and pay for products online. In this document, the terms uStore, store, and storefront are used interchangeably.

CU Marketplace – A virtual Marketplace that contains links to stores and products.

ClientLine – First Data's online reporting tool for credit card transactions

Payment Gateway – Processes payments from customers and sends payment data to the University's credit card processor. The Payment Gateway creates Automated Clearing House (ACH) standard files to send to the bank for web check transactions.

Roles and Responsibilities

Cash and Treasury Services Office:

The Cash and Treasury Services Office is responsible for electronic commerce including approving all requests for new stores, obtaining new Merchant ID's, setting up stores, configuring products, creating new host system accounts, adding merchants within the CU Marketplace, and providing departmental training. Cash and Treasury Services will also perform an overall reconciliation to PeopleSoft Financials and First Data's ClientLine.

Department Level:

Fulfiller

The Fulfiller is responsible for completing order processing by reviewing each order placed and shipping the product(s) purchased. An email notification of the order's shipment will be sent to the customer automatically upon fulfillment of the order. The system will not charge any credit cards until the order has been fulfilled.

Fulfillers with refund and cancel rights can also cancel all or part of a pending order and refund payment for an order. Orders should not be fulfilled until the order products can be shipped to the customer.

Store Accountant

The Store Accountant is responsible for running reports and reconciling revenues to those recorded in PeopleSoft. The reconciliation should be performed on at least a monthly basis. It may be necessary to reconcile more often dependent on volume. Any discrepancies should be reported to the Cash and Treasury Services Department.

Store Contact

A contact person or list serve will be designated for each approved store. This email address will appear to customers under the Contact Us link of the website. It will also appear in all automatically generated emails to customers.

uStore Creation Process and Timeline

The following chart and accompanying narrative is intended to provide an outline of the process and estimated timeline for creating a new store in the CU Marketplace. The time frames are approximate and dependent upon the complexity of the project. As a general rule, you should plan on a 2-3 week lead time from application submission to Marketplace site completion. The time frame given refers to business days, not calendar days.

Phase	Task	Time Frame	
Inquiry	Complete and submit CU Marketplace Application	1-2 days	
	The application will be reviewed thoroughly		
	A meeting may be scheduled to clarify any areas of concern		
Approval	Information collected during the inquiry phase will be reviewed to determine if uStore approval will be granted	1 day	
Acquisition	Banking and Payment Card Coordinator will request a new merchant from First Data Merchant Services	1 day	
	First Data Merchant Services will create the new merchant	4 days	
Discovery	E-Commerce Analyst will request additional information to aid in the configuration of the new uStore. (i.e. product images, descriptions, accounting and shipping information, etc.)	Occurs concurrently with the acquisition phase	
Development	E-Commerce Analyst will create the storefront and any associated product pages	3-5 days	
Review	Department will review the newly created Marketplace site and note any changes	1-3 days	
	E-Commerce Analyst will make any requested changes		
	Site becomes ready to start accepting payments		
Training	User roles will be assigned by the E-Commerce Analyst	1 day	
	Online departmental training will be provided to ensure proper maintenance of the uStore. In-person training can also be requested.		
		12 days	17 days
		Earliest	Latest

Inquiry

The first step for those seeking a Marketplace store is the submission of a CU Marketplace Application. It is important to include as much detail as possible in the application, as this will expedite the approval process. The application must be signed by the store requestor, as well as, the department's Business Officer. Once submitted, the application will be reviewed thoroughly. If necessary, a clarification meeting will be scheduled by Cash and Treasury Services with the requestor.

Approval

Information collected during the inquiry phase will be reviewed to determine if uStore approval will be granted. Not all store requests will be approved. If your store is not approved, you will be provided with an explanation.

Acquisition

During the acquisition phase, a merchant will be requested from First Data Merchant Services by the Banking and Payment Card Coordinator. The merchant will allow you to be able to take credit card payments online. As a general rule, each department will be set-up as an individual merchant within Marketplace.

Discovery

The discovery phase will occur concurrently with the acquisition phase. While we are waiting on First Data to create the merchant, you will be asked to provide details regarding your store and product configuration. Items needed

may include, but are not limited to, images, product descriptions, pricing structure, accounting information, shipping information, and available inventory.

Development

During the development phase, your store and all associated product pages will be created by the E-Commerce Analyst in the Cash and Treasury Services Department.

Review

The newly created uStore will be tested to ensure all aspects of the store are functional and ready to begin accepting payments. Cash and Treasury Services will be responsible for the initial testing, followed by testing by the department. Your involvement is key to the successful completion of this phase and will be a determining factor in the length of this phase. If changes are necessary, the E-Commerce Analyst will perform those changes at the department's request. After the review phase is complete, the site can begin accepting payments.

Training

User roles will be assigned after the review phase is complete. Departmental training will also be provided to ensure the proper maintenance of the new uStore. Training modules and a Marketplace Manual are located online at <http://www.clemson.edu/marketplace/training>. All processes are covered, including fulfillment of products, issuance of refunds, generation of reports, and reconciliation. An in-person training session can also be requested if needed.

Additional Guidelines

Credit Card Fees

Departments will be assessed a credit card processing fee for each credit card transaction. The rate is negotiated with the state contracted processing company.

Reconciling

Departments must reconcile sales transactions captured through their online storefronts with transactions posted to the CU General Ledger. If a department discovers that sales transactions are missing, duplicated, or incorrectly posted, the staff member responsible for reconciling the accounts must contact Cash and Treasury Services for assistance in resolving the errors.

Disputed Transaction Sales or Chargebacks

If a credit card holder disputes a sale transaction processed through the CU Marketplace, the department will need to contact Cash and Treasury Services. If the dispute is not resolved, the department will be charged for the transaction. Upon notice of charges for unsettled disputes, Cash and Treasury Services will transfer the charge back to the department's account.

Returns, Exchanges, and Refunds

In general, funds transferred in the sale of goods are refunded in the manner in which the good was originally purchased (credit card, check, etc.). Refunds, like returns, should be processed within 30 days of the purchase or delivery of an item.

Legal

Electronic publications are to follow the same University policies and standards as print publications in regards to copyright laws, "fair use" and intellectual property rights, and authorized use of the University's signature, seal, and logos.

Clemson University Marketplace sites must only be used for University business and any goods or services offered for sale must be related to the department's core mission.