



Oakland University

Student Business Services

Day to Day Operations Guide

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By now you have created a store, added some products (courses, apparel, services, etc) and you have received e-mails that users are buying your products (registering for courses). This is all fine and good, but, your boss wants to know how much revenue you have received from your product sales. Not only that, but you're getting calls from customers wondering when they will have their credit cards charged.

Look no further, it is here that you will learn all about the day-to-day operations of your store. This guide will show you how to process your orders so that your customers credit cards will be charged, t-shirts will be shipped, and course registrations processed.

The Fulfillment Process

The fulfillment Process is determined by whether or not auto-fulfill was set to 'yes' when the product went live in production.

When Auto-fulfillment is set to 'Yes' the customers payment is immediately charged when the order is placed, and no further fulfillment steps are necessary. Most registrations use auto-fulfillment. Using auto-fulfill is generally easier on departments since they don't have to log into MarketPlace daily to fulfill orders as they do when auto-fulfill is not used.

If auto-fulfillment was set to 'No' when you created your product, you will need to do a manual fulfill to accept the customers payment. This is generally done because physical products are being sold and shipped, or want to limit purchases to certain buyers. In this case setting auto-fulfillment to 'No' allows the department fulfiller to cancel orders before payment is accepted if the product is out of stock, or the buyer is not eligible for the purchase. Not using auto-fulfill may also make it easier for departments shipping physical products to keep track of processed (shipped) orders vs. new or pending orders.

Important! The buyer's credit card is not charged until the order is fulfilled.

The fulfillment process can also be affected by the payment type that the customer selected when submitting the transaction. If 'Days fulfiller must wait before fulfilling orders paid via ACH' is set to

▼ Meadow Brook Hall

▪ Settings

Accounting Codes

Users

► Stores

▼ Store Settings

General

Store Users

Images

Payment Methods

Shipping Classes

Categories

▪ Products

Merchant Id:	11
Merchant Name:	Meadow Brook Hall
Payment Gateway Host System Account Name:	Meadow Brook Hall
Payment Gateway Host System Account ID:	16
Default Return Check Fee:	\$ 25.00
Days fulfiller must wait before fulfilling orders paid via ACH. (Note: This wait period also applies to uPay refund requests.)	0
Back Orderable?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Auto Fulfill?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Stock # (30 chars max):	JazzGarden2010
Allowed Payment Methods:	<input checked="" type="checkbox"/> Visa <input checked="" type="checkbox"/> MasterCard <input checked="" type="checkbox"/> webCheck
Days To Wait before processing ACH Payments:	0

Save

Cancel



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- ▼ Marketplace Home
 - System Administration
 - Alumni Gifts
 - Arts & Science (CAS)
 - CSITS
 - Executive Events
 - Golf Course uPay
 - Golf Course uStore
 - Kresge Library
 - Meadow Brook Hall
 - MTD
 - Nursing CE
 - OU Career Services
- ▼ OU Continuing Ed
 - Settings
 - Accounting Codes
 - Users
- ▼ Stores
 - Add Store
 - ▼ SBA Continuing Ed
 - Store Settings
 - Order Search
 - Fulfill Orders (4)
 - uPay Sites
 - OU Memorabilia
 - OUCARES
 - Pawley Institute
 - SBS
 - SEHS PD
 - Marketplace Reports
 - Edit My Profile

something other than zero, then, regardless of whether auto-fulfill is set to yes or no, the order must be manually fulfilled. This generally shouldn't be an issue since this option should be set to zero.

Note: Use zero for Days fulfiller must wait before fulfilling orders paid via ACH'

Fulfilling Orders

Note: See the Fulfillment Checklist (page 15) when fulfilling Physical Products.

The Marketplace fulfillment process allows you to fulfill multiple orders at the same time (sometimes called batch fulfillment). To fulfill one or more orders, follow these steps:

Navigate to Marketplace Suite > Store > [store name] > Fulfill Orders. The pending orders list opens.

Locate the orders to fulfill.

Note: You can refine the orders displayed in the pending orders list. Search by year, by year and month, or by year, month, and day, or you can enter an order number. Click Go to refresh the report.

Select the corresponding checkbox for each order that you would like to fulfill.

Click the Process Fulfillment button and then OK.

OUCARES Fulfillment List

Fulfill orders on this page, or search for pending, cancelled, or fulfilled orders. To process refunds, search for fulfilled orders.

You Have 3 Fulfillments to Process.

Refresh Pending Fulfillments

From: To:

Show Orders Pending

Search

Search by Order #:

Search

<input type="checkbox"/> Select All	Order #	Shipment #	Order Date	Buyer Name	Delivery Method	Payment Method	Status
<input type="checkbox"/>	270	278	08/17/2009 11:28:41	Mrs Jenny Cloutier	US Mail	Credit Card	PENDING
<input type="checkbox"/>	293	304	09/11/2009 16:27:48	Robert Bonam	US Mail	Credit Card	PENDING
<input type="checkbox"/>	296	307	09/16/2009 11:21:58	Tiffany Yarnall	US Mail	Credit Card	PENDING

Process Fulfillment

The page at https://ebill.oakland.edu:8443 s...

Are you sure that you want to fulfill these shipments?

OK Cancel

<input type="checkbox"/>	270	278	08/17/2009 11:28:41	Mrs Jenny Cloutier	US Mail	Credit Card	PENDING
<input checked="" type="checkbox"/>	293	304	09/11/2009 16:27:48	Robert Bonam	US Mail	Credit Card	PENDING
<input checked="" type="checkbox"/>	296	307	09/16/2009 11:21:58	Tiffany Yarnall	US Mail	Credit Card	PENDING

Process Fulfillment



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The Accept Payment page opens.

Review the displayed order information.

Click the Accept Payment button to verify the charges. If you notice any incorrect order information on the Accept Payment page, see "Cancelling an Order or Changing Order Quantity".

Note: If you see error messages after clicking the Accept Payment button, see "Looking Up Error Codes" on page 143 of the MarketPlace User Guide. If you see error messages related to General Ledger data transfer, this does not mean the fulfillment has failed. It only means the general ledger was not yet updated successfully. Continue processing the fulfillment.

Important! Once you leave the Accept Payment screen during fulfillment, be sure you

complete all the remaining steps because you cannot return to these steps later.

Do not skip steps unless you are sure they do not apply to the order.

When fulfilling products that will be shipped, click the 'Print Packing List' button. This launches a new browser window that contains packing lists for all the orders that you are fulfilling. When you send the document to your printer, each packing list will print on a separate page. Close the packing list window, and then click the Proceed to Step 3 button.

OUCARES Fulfillment

Print the packing list if needed. Then, continue to step 3 to complete the fulfillment process.

[Back to Fulfillment List](#)

1 Accept Payment 2 Print Packing List 3 Shipment Tracking Number 4 E-mail Buyer

Order Info:	Delivery:	Buyer Info:	Ship To:
#293 09/11/2009 04:27:48 PM	US Mail	Robert Bonam robertbii@yahoo.com	Mr Robert O Bonam, II 120 NFH Rochester, MI 48309
Item	Stock #	Quantity Ordered	
OUCARES 2008 Film Camp DVD	OUCARES DVD 2008	1	

Order Info:	Delivery:	Buyer Info:	Ship To:
#296 09/16/2009 11:21:58 AM	US Mail	Tiffany Yarnall tyarnal+test@oakland.edu	Tiffany L Yarnall 5642 Tall St. Clarkston, MI 48346
Item	Stock #	Quantity Ordered	
OUCARES 2008 Film Camp DVD	OUCARES DVD 2008	3	
(Option)	Phone Number xxx-xxx-xxxx: : 222-333-4444		
(Option)	OUCARES Mailing List: : Please add my name to the OUCARES mailing list		

[Print Packing List](#)

[Proceed To Step 3](#)

OUCARES Fulfillment

[Back to Fulfillment List](#)

1 Accept Payment 2 Print Packing List 3 Shipment Tracking Number 4 E-mail Buyer

Order Info:	Delivery:	Buyer Info:	Ship To:
Order #: 293 09/11/2009 04:27:48 PM	US Mail	Robert Bonam robertbii@yahoo.com	Mr Robert O Bonam, II 120 NFH Rochester, MI 48309
Credit Card Item	Stock #	Quantity Ordered	New Quantity
OUCARES 2008 Film Camp DVD	OUCARES DVD 2008	1	1 <input type="button" value="v"/>
Update Items			

Order Info:	Delivery:	Buyer Info:	Ship To:
Order #: 296 09/16/2009 11:21:58 AM	US Mail	Tiffany Yarnall tyarnal+test@oakland.edu	Tiffany L Yarnall 5642 Tall St. Clarkston, MI 48346
Credit Card Item	Stock #	Quantity Ordered	New Quantity
OUCARES 2008 Film Camp DVD	OUCARES DVD 2008	3	3 
(Option)	Phone Number xxx-xxx-xxxx: : 222-333-4444		
(Option)	OUCARES Mailing List: : Please add my name to the OUCARES mailing list		
<div>Update Items</div>			

[Accept Payment](#)



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At this time, if applicable, you have the opportunity to enter a shipment tracking code if the package was sent via Express Mail, UPS or FedEx. This would be found on the shipping receipt used to ship the order. After entering in the tracking code, if any, click the Proceed to Step 4 button.

Click the Send Email button to send a shipment confirmation to each customer. You may want to avoid sending the e-mail in certain circumstances, if this is the case click 'Back to Fulfillment List' instead of 'Send E-mail'. This will still complete the fulfillment, just without sending the e-mail.

OUCARES Fulfillment

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

[Back to Fulfillment List](#)

1 Accept Payment 2 Print Packing List 3 Shipment Tracking Number 4 E-mail Buyer

Order Info:	Delivery:	Buyer Info:	Ship To:
#293 09/11/2009 04:27:48 PM	US Mail	Robert Bonam robertbii@yahoo.com	Mr Robert O Bonam, II 120 NFH Rochester, MI 48309
Item	Stock #	Quantity Ordered	
OUCARES 2008 Film Camp DVD	OUCARES DVD 2008	1	
Tracking Number: <input type="text"/>			

Order Info:	Delivery:	Buyer Info:	Ship To:		
#296 09/16/2009 11:21:58 AM	US Mail	Tiffany Yarnall tyarnal+test@oakland.edu	Tiffany L Yarnall 5642 Tall St. Clarkston, MI 48346		
Item	Stock #	Quantity Ordered			
OUCARES 2008 Film Camp DVD	OUCARES DVD 2008	3			
(Option)	Phone Number xxx-xxx-xxxx: : 222-333-4444				
(Option)	OUCARES Mailing List: : Please add my name to the OUCARES mailing list				
Tracking Number: <input type="text"/>					

[Proceed To Step 4](#)

OUCARES Fulfillment

Send an e-mail to the customer to complete the fulfillment process. Follow your own policies for the timing of shipment.

[Back to Fulfillment List](#)

1 Accept Payment 2 Print Packing List 3 Shipment Tracking Number 4 E-mail Buyer

Order Info:	Delivery:	Buyer Info:	Ship To:
#293 09/11/2009 04:27:48 PM	US Mail	Robert Bonam robertbii@yahoo.com	Mr Robert O Bonam, II 120 NFH Rochester, MI 48309
Item	Stock #	Quantity Ordered	
OUCARES 2008 Film Camp DVD	OUCARES DVD 2008	1	

Order Info:	Delivery:	Buyer Info:	Ship To:		
#296 09/16/2009 11:21:58 AM	US Mail	Tiffany Yarnall tyarnal+test@oakland.edu	Tiffany L Yarnall 5642 Tall St. Clarkston, MI 48346		
Item	Stock #	Quantity Ordered			
OUCARES 2008 Film Camp DVD	OUCARES DVD 2008	3			
(Option)	Phone Number xxx-xxx-xxxx: : 222-333-4444				
(Option)	OUCARES Mailing List: : Please add my name to the OUCARES mailing list				

[Send E-Mail](#)

OUCARES Fulfillment

Continue to the next fulfillment, or use the menu to the left to manage another feature of Marketplace.

[Back to Fulfillment List](#)

FULFILLMENT COMPLETE



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Sales Tax Documentation

Sales where the shipping address is out-of-state are not subject to Michigan sales tax. This is automatically calculated in MarketPlace. Departments are responsible for retaining necessary documentation for these out-of-state sales. This includes evidence of shipment outside of Michigan for the purpose of substantiating a deduction on the Michigan sales Tax return. Acceptable documentation includes any of the following:

- A waybill or bill of lading made out to the seller's order and calling for delivery outside the state.
- An insurance or registry receipt issued by the United States postal service.
- A trip sheet signed by the seller's delivery agent and showing the signature and address of the person, outside the state, who received the goods delivered.
- Sales slips or other sales and shipping forms regularly used by the seller for interstate transactions must be filed separately from intrastate transactions, in an accessible manner to facilitate an audit by the state.

Cancelling an Order or Changing Order Quantity

To cancel an order, or to change the quantity of an item ordered, the fulfiller must initiate the fulfillment process, as described in steps 1 through 3 of "Fulfilling Orders". Once the fulfillment process has been initiated for a specific order, a fulfiller with refund/cancel rights can change the quantity of items ordered, with the following limitations:

- The order quantity of a given item can only be reduced; it cannot be increased.
- The order quantity cannot be changed for orders processed with ACH payments.

To cancel an order or to change the order quantity—for credit card purchases only—follow these steps:

Navigate to Marketplace Suite > Store > [store name] > Fulfill Orders.

The Fulfillment List page opens.

Note: The list of orders displayed on the Fulfillment List page can be modified by using the fields at the top of the page. You can show orders "pending for" a specified time period

CSITS Fulfillment

[Back to Fulfillment List](#)

1 Accept Payment **2 Print Packing List** **3 Shipment Tracking Number** **4 E-mail Buyer**

Order Info:	Delivery:	Buyer Info:	Ship To:
Order #: 300 09/16/2009 12:56:26 PM	US Mail	Tiffany Yarnall tyarnall+test@oakland.edu	Tiffany L Yarnall 5642 Tall St. Clarkston, MI 48346

Credit Card Item	Stock #	Quantity Ordered	New Quantity
Fall 2009 Commencement Ceremonies on DVD	FallComDVD09	2	<input type="text" value="2"/>
(Option)	Student's Name : Tiffany Yarnall		<input type="text" value="0"/>
(Option)	School : Arts and Sciences, Health Sciences		<input type="text" value="1"/>
(Option)	Telephone Number (xxx-xxx-xxxx) : 222-777-9999		<input type="text" value="2"/>

[Update Items](#)

[Accept Payment](#)



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(year, month, or day). You can show orders that were "ordered in" a specified time period. And you can show orders that were "fulfilled in" a specified time period. In addition, you can search for a specific order by entering an order number.

Select the corresponding checkbox for each order that you would like to cancel or change.

Click the Process Fulfillment button. The Accept Payment page opens.

To change the quantity ordered, use the New Quantity dropdown list to select a new order quantity. You can only reduce the quantity ordered. You cannot increase the quantity. To cancel an entire order of an item, change its quantity to zero. If multiple items have been ordered and the entire order needs to be cancelled, the fulfiller must change the order quantity to zero for each order item.

Click the Update Items button. The updated amounts are now reflected. If you reduce the quantity to zero, the product is removed from the order.

If the displayed orders still contain purchase items, you can continue processing the orders by clicking the Accept Payment button.

Note: When you change the quantity ordered to zero for all items in an order, the buyer will be automatically notified via e-mail that their order has been canceled. If you change the order quantity to any value other than zero, the buyer will not be automatically notified that their order quantity was changed. However, the buyer will see the updated order quantity when they receive the fulfillment e-mail message. If your policies require that you notify the buyer when the order quantity is changed to a value other than zero, you must send this communication manually. The Buyer Info section of the Order Fulfillment page includes the buyer's e-mail address.

Revised 05/10/2010

SBA Continuing Ed Fulfillment List

Fulfill orders on this page, or search for pending, cancelled, or fulfilled orders. To process refunds, search for fulfilled orders.

Load All Pending Fulfillments

From: 09/18/2009 To: 09/18/2009

Show Orders

Fulfilled Date

Search

Search by Order #:

Search

Order #	Shipment #	Order Date	Buyer Name	Delivery Method	Payment Method	Status	Action
301	313	09/18/2009 11:32:27	Tiffany Yarnall	None	Credit Card	COMPLETED	View

CSITS Fulfillment List

Fulfill orders on this page, or search for pending, cancelled, or fulfilled orders. To process refunds, search for fulfilled orders.

You Have 4 Fulfillments to Process.

Refresh Pending Fulfillments

From: To:

Show Orders

Pending

Search

Search by Order #:

Search

<input type="checkbox"/> Select All	Order #	Shipment #	Order Date	Buyer Name	Delivery Method	Payment Method	Status
<input type="checkbox"/>	250	258	07/31/2009 17:13:51	Linda Switzer	US Mail	Credit Card	PENDING
<input type="checkbox"/>	262	270	08/07/2009 10:57:17	Mr Robert Bonam	US Mail	Credit Card	PENDING
<input type="checkbox"/>	297	308	09/16/2009 11:22:42	Tiffany Yarnall	US Mail	Credit Card	PENDING
<input checked="" type="checkbox"/>	300	312	09/16/2009 12:56:26	Tiffany Yarnall	US Mail	Credit Card	PENDING

Process Fulfillment



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Processing Refunds and Partial Refunds

A fulfiller with refund/cancel rights can process refunds for orders that have already been fulfilled, crediting credit card purchases back to the buyer's credit card and ACH purchases back to the buyer's bank account.

Refunds

To complete a regular refund ('Allow Partial Refunds' and 'Allow the refunding of shipping' in the general store settings set to 'No').

Navigate to Marketplace Suite > Store > [store name] > Fulfill Orders.

Select Fulfilled In or Ordered In from the Show Orders dropdown list, then enter year, year and month, or year, month, and date to search. Click Search.

Note: If you know the specific order number to refund, you can select Fulfilled Orders, then enter the order number and click Go.

Locate the Order and click its View button.

The Fulfillment Details screen appears. If a refund is possible, you will see a Quantity Returned field and the Process Refund button.

In the Quantity Returned field, enter the quantity for which you want to refund money. Click the Process Refund button.

Fulfillment Activity (417)

Date	09/16/2009 12:35:59 PM				
Type	Purchase				
Amount	\$41.34				
Payment Gateway Reference Number	20090916000000				
Shipment Tracking Number					
<table><thead><tr><th>Item</th><th>Quantity</th></tr></thead><tbody><tr><td>OUCARES 2008 Film Camp DVD</td><td>3</td></tr></tbody></table>		Item	Quantity	OUCARES 2008 Film Camp DVD	3
Item	Quantity				
OUCARES 2008 Film Camp DVD	3				

Fulfillment Activity (419)

Date	09/18/2009 11:25:05 AM				
Type	Return				
Amount	\$-10.60				
Payment Gateway Reference Number	20090916000000				
Shipment Tracking Number					
<table><thead><tr><th>Item</th><th>Quantity</th></tr></thead><tbody><tr><td>OUCARES 2008 Film Camp DVD</td><td>1</td></tr></tbody></table>		Item	Quantity	OUCARES 2008 Film Camp DVD	1
Item	Quantity				
OUCARES 2008 Film Camp DVD	1				

Item	Stock #	Quantity Ordered	Quantity Not Fulfilled	Quantity Cancelled	Quantity Returned	New Quantity To Return
OUCARES 2008 Film Camp DVD	OUCARES DVD 2008	3	0	0	0	<input type="text" value="0"/>
(Option)	Phone Number xxx-xxx-xxxx: :222-333-4444					<input type="text" value="1"/>
(Option)	OUCARES Mailing List: :Please add my name to the OUCARES mailing list					<input type="text" value="2"/>

To refund one or more of each item, enter the quantity returned and click Process Refund.

Update Tracking Number

Tracking Number: No Tracking Number

Update

Fulfillment Information

This fulfillment was processed on 09/16/2009, 12:35:59 PM.

Order #: 296

Delivery Information

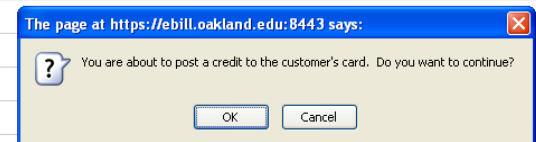
Date:

Method:

Buyer Information

Name:

Email Address:





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Note: If allow the refunding of shipping is set to No in the store general setting the user will not be refunded shipping charges or tax on shipping charges.

Partial Refunds

To complete a partial refund ('Allow Partial Refunds' in the general store settings set to 'Yes') Navigate to Marketplace Suite > Store > [store name] > Fulfill Orders.

Select Fulfilled In or Ordered In from the Show Orders dropdown list, then enter year, year and month, or year, month, and date to search. Click Search.

Note: If you know the specific order number to refund, you can select Fulfilled Orders, then enter the order number and click Go.

Locate the Order and click its View Details button.

The Fulfillment Details screen appears. If a refund is possible, you will see at least one Refund Amt field and the Process Refund button.

The first refund section allows you to enter a New Quantity to Return and a Refund Amt. Since partial refunds are allowed the refund amount does not need to be proportionate to the new quantity to return amount. (Ex. If the customer forgot to enter a promotional code for an early purchase discount, the store could leave the New Quantity to Return at zero and enter a Refund in the amount of the discount.)

Note: When doing a partial refund, if you don't enter an amount in the 'Refund Amt' area, the customer will NOT receive a refund. In other words changing the 'New Quantity to Return' does not affect the refund amount.

The second refund section allows you to enter a Refund amount for the shipping and tax on shipping charges. You can enter any amount up to the Refundable Shipping Amt.

When you have completed both sections click the Process Refund button.

▲▼ Order #	Shipment #	▲▼ Order Date	Buyer Name	▲▼ Delivery Method	▲▼ Payment Method	Status	Action
308	320	09/28/2009 11:00:38	Tiffany Yarnall	US Mail	Credit Card	COMPLETED	View

Item	Stock #	Quantity Ordered	Quantity Not Fulfilled	Quantity Cancelled	Quantity Returned	Refundable Amt	New Quantity To Return	Refund Amt
OUCARES 2008 Film Camp DVD	OUCARES DVD 2008	4	0	0	0	42.40	0 ▼	\$ 5.00
(Option) Phone Number xxx-xxx-xxxx: :x								
Enter the amount of shipping you wish to refund								
Refundable Shipping Amt						\$12.72		
Refund Amt						2.00		
To refund one or more of each item, enter the quantity returned and click Process Refund.								Process Refund
Update Tracking Number								
Tracking Number:						No Tracking Number		
Update								

Fulfillment Activity (437)					
Date	09/28/2009 11:50:00 AM				
Type	Return				
Amount	\$-5.00				
Payment Gateway Reference Number	20090928000000				
Shipment Tracking Number					
<table><tr><th>Item</th><th>Quantity</th></tr><tr><td>OUCARES 2008 Film Camp DVD</td><td>0</td></tr></table>	Item	Quantity	OUCARES 2008 Film Camp DVD	0	
Item	Quantity				
OUCARES 2008 Film Camp DVD	0				

Fulfillment Activity (438)	
Date	09/28/2009 11:50:02 AM
Type	Shipping Refund
Amount	\$-2.00
Payment Gateway Reference Number	20090928000000
Shipment Tracking Number	



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- ▼ Marketplace Home
 - System Administration
 - ▼ Alumni Gifts
 - Settings
 - Accounting Codes
 - Users
 - ▼ Stores
 - Add Store
 - ▼ Staff Benefits
 - Store Settings
 - Order Search
 - Fulfill Orders (0)

Cancelling & Refunding Recurring Payments

Navigate to Marketplace Suite > Store > [store name] > Fulfill Orders.

The first step to cancelling or refunding a recurring payment is to look up the order, either by order number or order date. Once you have found the correct order in the list at the bottom of the page click 'View'.

This opens a page which lists all of the order information along with a list of pending payments (scheduled payment), and a list of completed payments.

To cancel a pending payment, select the check box next to the payment you wish to cancel. If you wish to cancel all future payments check the 'Select All' check box as shown in the screenshot on the right. When you have selected the pending payments to be canceled click the 'Cancel Payment' button. The selected Pending Payments are now canceled and appear in the 'Completed Payments' section with a status of 'Cancel'.

To refund a completed payment, select the 'Refund' link in the 'Action' column. The payment is now refunded and the status changes from 'Success' to 'Refunded'.

Completed Payments

Date	Status	TPG Reference Number	Original Amount	Remaining Balance	Action
03/05/2010, 10:57:52 AM	Success	20100305000005	\$187.50	\$187.50	Refund
04/05/2010, 12:09:26 AM	Refunded	20100405000000	\$187.50	\$0.00	
05/05/2010, 12:00:00 AM	Cancel		\$187.50	\$0.00	
06/05/2010, 12:00:00 AM	Cancel		\$187.50	\$0.00	
07/05/2010, 12:00:00 AM	Cancel		\$187.50	\$0.00	
08/05/2010,	Cancel		\$187.50	\$0.00	

Staff Benefits Fulfillment List

Fulfill orders on this page, or search for pending, cancelled, or fulfilled orders. To process refunds, search for fulfilled orders.

Load All Pending Fulfillments

From: To:

Show Orders Pending

Search

Search by Order #:

Search

Order #	Shipment #	Order Date	Buyer Name	Delivery Method	Payment Method	Status	Action
477	490	03/05/2010 10:57:14	Stephen Steps	None	Credit Card		View

Pending Payments

Pending Payments			
<input checked="" type="checkbox"/> Select All	Date	Status	Amount
<input checked="" type="checkbox"/>	05/05/2010, 12:00:00 AM	Not Processed	\$187.50
<input checked="" type="checkbox"/>	06/05/2010, 12:00:00 AM	Not Processed	\$187.50
<input checked="" type="checkbox"/>	07/05/2010, 12:00:00 AM	Not Processed	\$187.50
<input checked="" type="checkbox"/>	08/05/2010, 12:00:00 AM	Not Processed	\$187.50
<input checked="" type="checkbox"/>	09/05/2010, 12:00:00 AM	Not Processed	\$187.50
<input checked="" type="checkbox"/>	10/05/2010, 12:00:00 AM	Not Processed	\$187.50
<input checked="" type="checkbox"/>	11/05/2010, 12:00:00 AM	Not Processed	\$187.50

Cancel Payment

Completed Payments

Date	Status	TPG Reference Number	Original Amount	Remaining Balance	Action
03/05/2010, 10:57:52 AM	Success	20100305000005	\$187.50	\$187.50	Refund
04/05/2010, 12:09:26 AM	Success	20100405000000	\$187.50	\$187.50	Refund



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Student Business Services

Editing Your Profile Settings

- ▼ Marketplace Home
 - ▶ System Administration
 - ▶ Alumni Gifts
 - ▶ Arts & Science (CAS)
 - ▶ CSITS
 - ▶ Executive Events
 - ▶ Golf Course uPay
 - ▶ Golf Course uStore
 - ▶ Kresge Library
 - ▶ Meadow Brook Hall
 - ▶ MTD
 - ▶ Nursing CE
 - ▶ OU Career Services
 - ▶ OU Continuing Ed
 - ▶ OU Memorabilia
 - ▶ OUCARES
 - ▶ Pawley Institute
 - ▶ SBS
 - ▶ SEHS PD
 - ▶ Marketplace Reports
 - Edit My Profile

Receiving notification e-mails when orders are placed

If you are a merchant manager, store Manager, store clerk, or fulfiller, you may edit your profile and choose to have an e-mail sent to you whenever a purchase is made from your store. This is useful when your store has a low volume and you don't want to log in to the Operations Center to see if new orders have been placed.

Use these steps to edit your profile for receiving an e-mail message when an order is submitted:

Choose Edit My Profile from the left navigation bar. The Edit Profile screen appears.

For each store from which you would like to receive a notification e-mail message, select the checkbox beside the corresponding store name. (Most users will only see one or two stores that they are associated with.)

Choose the Update Notification Settings button.

Changing your Password

This is where you will change your password when you first login. You must change your password from the initial password assigned to prevent other persons from logging in with your username.

Update Profile

Welcome, Tiffany Yarnall! From this page you can update your contact information, change your password, and decide which order is placed.

Profile Information

First Name:	<input type="text" value="Tiffany"/>	*
Last Name:	<input type="text" value="Yarnall"/>	*
E-mail Address:	<input type="text" value="tlyarnal+test@oakland.edu"/>	
Phone Number (day):	<input type="text" value="x2273"/>	
Phone Number (mobile):	<input type="text"/>	
Phone Number (night):	<input type="text"/>	

*Indicates Required Information

Update Profile

I would like to receive an e-mail when an order is placed from the following store(s):

<input checked="" type="checkbox"/> Staff Benefits
<input type="checkbox"/> Classroom Support & Instructional Tech Svc (CSITS)
<input type="checkbox"/> Golf Course
<input type="checkbox"/> Kresge Library
<input type="checkbox"/> Meadow Brook Hall Events
<input type="checkbox"/> Music, Theatre and Dance
<input type="checkbox"/> Center for Executive and Continuing Education
<input type="checkbox"/> Pawley Institute
<input type="checkbox"/> Student Business Services

Update Notification Settings

Change your Operations Center password:
(password must be 6 characters minimum with at least one number)

Your current password:	<input type="text"/>
Enter your NEW password:	<input type="text"/>
Re-enter your NEW password:	<input type="text"/>

Change Password



Oakland University

Student Business Services

MarketPlace Reporting

▼ Marketplace Home

- ▶ System Administration
- ▶ Alumni Gifts
- ▶ Arts & Science (CAS)
- ▶ CSITS
- ▶ Executive Events
- ▶ Golf Course uPay
- ▶ Golf Course uStore
- ▶ Kresge Library
- ▶ Meadow Brook Hall
- ▶ MTD
- ▶ Nursing CE
- ▶ OU Career Services
- ▶ OU Continuing Ed
- ▶ OU Memorabilia
- ▶ OUCARES
- ▶ Pawley Institute
- ▶ SBS
- ▶ SEHS PD
- ▼ Marketplace Reports
 - ▶ Marketplace
 - ▶ Merchant Revenue
- ▼ Stores
 - ▶ Career Services
- ▼ SBA Continuing Ed
 - By Product
 - By Stock No.
 - By Product Type
 - Totals
 - Buyer Information
 - Recurring Payment
 - GL Exception Report (0)
- ▶ CSITS

Each report by default shows today's activity for store. You can customize your 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/yyyy format.

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. Uncheck 'Show columns with zero dollar price adjustment when exporting' to eliminate unnecessary columns.

To use Marketplace reports, click the Marketplace Reports link in the control menu.

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.

The three other types of reports (Buyer Information, Recurring Payment, and GL Exception Report) can be used to report specific types of information (specifically transactions by Purchaser and other buyer information, recurring payment information, and data that fails to transfer into the general ledger, respectively).

Store Revenue Report by Product

The Store Revenue Report by Product is shown in this example (test data is shown).

[Back To Store Revenue Report](#)

[Export To CSV](#)

☐ Show columns with a zero dollar price adjustment when exporting.

From: 01/01/2010



To: 05/10/2010



[View](#)

[Hide Product Detail](#)

Store Revenue Report

The default report shows current day information.

[Export To CSV](#)

From: 07/01/2009



To: 09/11/2009



Product

[View](#)

Product Name	Number Sold	Amount Paid
Financial Planning Exam Review 2009 - 2010	4	\$3,400.00
Quantitative Methods Workshop	4	\$2,800.00
Project Management Certificate	1	\$2,800.00
Paralegal Certificate Fall 2009	2	\$2,535.00
Project Management Certificate Fall 2009	1	\$1,000.00
Computer-Based Office Skills Course: Level 2	1	\$320.00
Computer-Based Office Skills Course: Level 1	1	\$320.00
SBA 40th Anniversary Events	1	\$110.00
Web 2.0 Interface Development	-1	\$0.00
Total:	14	\$13,285.00



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The Store Revenue Report by Product, lists all the products sold between the dates selected, along with the number sold and total amount paid for each product. Each product name is also linked to a corresponding drill down Product Detail Report which gives additional information about the revenue associated with an individual product. For example purchaser name, e-mail address, payment method, product and buyer modifiers for each item sold, would be seen in the product drill down report. This drill down product report is often one of the most helpful reports to export to CSV.

Store Revenue Report by Stock Number

The Store Revenue Report by Stock Number is very similar to the 'by Product' report; it just includes an additional column with the stock number. This could be useful if meaningful stock numbers were used (such as SKU's for physical products), or if two products had the same name, but different stock numbers (such as an event that takes place annually). It is strongly encouraged, however, to use unique product names and stock numbers.

The Store Revenue Report by Stock Number can also be useful when a product has multiple articles; this report shows each article on its own line instead of clumped into one line. For example if your store was selling a T-shirt that came in S, M or L, the 'by Product' report would show the total number sold and amount collected for all sizes of the T-shirt (a drill down report would have to be used to get information about each size), while the 'by Stock Number' report would show the number sold and amount collected for each size on its own line.

Store Revenue Report by Product Type

The Store Revenue Report by Product Type displays store revenue split into product types. The MarketPlace product types are generic, digital, and donation. Since most stores use only generic products, this report usually isn't very helpful for departments.

Store Revenue Report

The default report shows current day information.

[Export To CSV](#)

From: 03/01/2010 To: 05/01/2010 Stock No. [View](#)

▲▼ Stock No.	▲▼ Item Name	▲▼ Number Sold	▲▼ Amount Paid
198	Architectural Print T-Shirt	5	\$74.75
24	Coaster	6	\$41.70
14	Pegasus Charm	2	\$39.90
197	Architectural Print Tote Bag	3	\$29.85

Store Revenue Report

The default report shows current day information.

[Export To CSV](#)

From: 05/01/2009 To: 05/10/2010 Product Type [View](#)

▲▼ Product Type	▲▼ Number Sold	▲▼ Amount Paid
Donation	3	\$160.00
Generic	7	\$105.00
Total:	10	\$265.00



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Store Revenue Report by Totals

The Store Revenue Report by Totals shows total amounts collected for fulfillments (orders) and items sold. This report will likely be helpful to departments charging shipping or tax on any products, since it is the only report that displays the shipping and tax totals collected.

Buyer Information Report

The Buyer Information Report displays buyer modifiers collected by order for stores that use buyer modifiers. This buyer information is also automatically displayed with the appropriate products purchased in the Store Revenue by Product and by Stock Number reports.

If you collected information such as how buyers heard about your product / store as a buyer modifier, then this report could be useful to retrieve just the desired information in one report (instead of having to extract it out of each order).

Recurring Payment Report

The Recurring Payment Report displays orders with recurring payments scheduled. Future scheduled payments can be seen up choosing a future date for the 'To' date. For instance if it is May and you want to see all the scheduled payments for the rest of the year, you could choose today as the 'From' date and the end of the year as the 'To' date. By clicking on the system tracking ID more detailed information about the recurring payment order can be seen; information such as the scheduled payment date and status are included.

GL Exception Report

General ledger exceptions occur when data (such as accounting codes) are incorrect or missing or otherwise fail to transfer into the general ledger system. These exceptions are grouped in the Marketplace GL Exception Report. The Marketplace GL Exception Report shows all transactions that failed to transfer data into the general ledger system. By clicking the View link in the Action column, you can view detailed information for a specific exception.

Generally if you have a transaction that failed, select 'View'. Make sure accounting codes are selected, toward the bottom of the page select 'Re-Submit', and click 'Update Order'. If you continue to have issues contact SBS for further assistance.

Store Revenue Report

The default report shows current day information.

[Export To CSV](#)

From: 05/01/2009 To: 05/10/2010 Totals [View](#)

Store Name	# of Fulfillments	# of Items Sold	Item Amount	Shipping Amount	Item + Shipping Amount	Tax Collected	Total Amount with Tax
Meadow Brook Hall Museum Shop	27	66	\$913.70	\$109.00	\$1,022.70	\$60.69	\$1,083.39

Store Recurring Payment Group Report

The default report shows current day information.

[Export To CSV](#)

From: 10/01/2009 To: 05/10/2010 [View](#)

Store ID	Store Name	Processed Transactions	Processed Revenue	Pending Transactions	Pending Revenue
1	Staff Benefits	72	\$6,732.49	0	\$0.00

System Tracking ID	Payment Method	Name	Installments	Total Revenue
279	MasterCard	Tiffany L Yarnall	13 of 18	\$650.00
332	MasterCard	Tiffany L Yarnall	6 of 12	\$600.00
333	MasterCard	Tiffany L Yarnall	6 of 12	\$600.00
334	MasterCard	Linda M Switzer	6 of 12	\$600.00
335	MasterCard	Tiffany L Yarnall	1 of 2	\$100.00



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Appendix A

The Fulfillment Checklist (for Physical Products)

- ☐ A. Review order / Check that items are in stock
- ☐ B. Fulfill order within 4 days (including non-business days) of the order being placed
 - During the fulfilling process you will have the option to:
 - Print a packing list
 - Add a tracking number – to use a tracking number, either:
 - Contact Shipping and Receiving for a tracking number prior to fulfilling, add the tracking number during the fulfillment process and during Step 4, send an e-mail to buyer (the e-mail will include the tracking number).
 - OR
 - Leave the tracking number blank during the fulfillment process, but in Step 4, don't send the buyer an e-mail (Step 4, click 'Back to Fulfillment List' instead of 'E-mail Buyer') this will fulfill the order, but not send an e-mail.
- ☐ C. Prepare Shipping Form (include MarketPlace order number(s) on the form)
- ☐ D. Ship product (work with Shipping and Receiving)
 - If you already add the tracking number or are not using a tracking number, proceed to E
 - If you are getting a tracking number then: ship the product, get a tracking number, log back into MarketPlace, look up the order, add the tracking number, and choose the option that allows you to send an e-mail to the buyer.
- ☐ E. File paper work
 - Sales slips or other sales and shipping forms regularly used by the seller for *interstate* transactions must be filed separately from *intrastate* transactions, in an accessible manner to facilitate an audit by the state.
- ☐ F. Reconcile shipping revenue to charges (if applicable)