Hello and welcome to Marketplace Training. Marketplace is an online mall managed by the Student Organization Finance Center where recognized student organizations can set up a storefront for their online business needs. Marketplace is commonly used to collect dues, sell merchandise and create registrations and ticketing for events.

This video will highlight the important tools and tasks to be performed by Marketplace users to set up and manage their online storefront. Additional support can be found in the Marketplace User Guide and by contacting the SOFC.

Your online storefront will be initially set up after you have turned in an executed Marketplace Agreement and completed this training. The SOFC will send you a link and a login for Touchnet, the parent company for Marketplace. This login will have an assigned temporary password. Your first responsibility as a Marketplace user will be to set up your own unique password. Please note this site is not compatible with Internet Explorer.

**TouchNet Home Page**

On the Touchnet Home page you will select Marketplace from the Application drop-down menu.

**Marketplace Home Page**

The Marketplace home page will have a list of any of your available stores. If you are making changes, it is a good idea to disable the store until all changes are ready to publish to the website.

Once you have selected your store, the navigation menu on the left will show the different options for customizing. Before making any changes, there are a few basic rules about Marketplace that you must know.

**Marketplace Policies**

Donations – No donations or tax-deductible sponsorships are to be processed through Marketplace. Consult the SOFC Financial Training for instructions on receiving donations or setting up sponsorships through the Texas A&M Foundation.

Refunds and Cancellations – Refunds and order cancellations must be processed by the SOFC with an advisor’s approval.

SOFC Review – When adding or making changes to products, please email the SOFC and ask them to review and approve the changes prior to enabling purchases over the internet.

Taxes – Every product and associated shipping class must be set to the “no tax” option manually.

Surcharges – Organizations are not allowed to add surcharges outside of the price of the item and associated shipping. This includes credit card surcharges. Discounts for other payment methods can be offered.

**User Roles**

In your Marketplace Agreement you will have specified some user roles. Users can be set up either as store managers, clerks or accountants.

Store managers can fulfill orders, change settings, add / delete or edit products and generate reports.

Store clerks can change settings, add / delete and edit products

Store accountants can generate reports only

You can view user roles but cannot make any changes. Any changes to these roles will have to be requested through the SOFC.

**Edit My Profile** - There are two menus for making changes to your profile. On the top right underneath your profile name is “Edit Profile”. This link can be used to update your own password and security information. There is a second
“Edit My Profile” link in the left hand menu bar. Here you can set a preferred email for receiving order notifications. It is important that you set up notifications to an email address that will be checked regularly by the store manager.

**Setting up Your Store**

Setting up your store for the first time involves several steps.

**General Settings**

1. **Status Management** – When making changes to your online store, you can temporarily disable the store so it will not appear in the Marketplace online mall. You should receive approval for any changes before enabling products, shipping methods or your storefront. Make sure you have disabled both the web and mobile views.

2. Navigate back to the General Settings page to set up Automatic Email Messages – It is very important to set up messaging options so users will receive appropriate feedback when their order is placed. The emails will default to the contact email you have established for your store. However it is good customer service to include valid contact information for order inquiries in the body of the email. Note that the email fields accept html formatting. Taking the time to compose thorough and professional responses to all the ordering scenarios listed will cut down on direct inquiries to your store contacts.

3. Scroll down the page to Administrative Settings. Here is where you will set options for refunds.

   There is also a selector for Donations – This must be set to “no”. Remember that you cannot take donations through Marketplace.

4. Now you will Link your store to an SOFC Account – This account will be the default account for Marketplace funds and fees and will have been specified on your Marketplace Agreement. Be very careful setting up your linked SOFC account. You do not want to select the wrong organization or account. Funds and fees will post to the account monthly.

5. Specify a written policy for Refunds and Returns. Marketplace defaults to a policy that “All sales are final”. Make sure your written policy matches the options you have selected.

**Images Tab** Marketplace gives you the option to customize your storefront with a custom logo or organizational images as banner art. Try to select high-quality images that will look good on different screen resolutions. Whatever image you choose should represent both your organization and Texas A&M University.

**Categories** Next you will proceed to the Categories menu on the left-hand navigation bar. Here you can set up Categories to which your products can be assigned. Please note that this step is optional. If your storefront offers only a handful of items for sale or is used exclusively for collecting dues, you will not need to set up categories. However, if you sell multiple products and product types, setting up top-level categories and sub categories will help make your website appear organized and professional. I recommend you plan your category structure ahead of time so it will best meet your organization’s long-term needs. Once you have set up top-level categories you can add sub categories. Using subcategories allows you to create a drill-down menu structure at the store level. You will also be able to assign products to the mall-level categories so they will come up in general searches conducted on the Marketplace home page. This allows you to raise the visibility of your products to all Texas A&M Marketplace buyers.

**Payment Methods** – Set the types of payment you accept and the sort order in which the options will appear in the drop down. Marketplace passes on credit card fees to the organization. These are standardized at 40 cents per transaction and 3% of total transactions monthly.

**Shipping Classes** – In order to start adding products you must first set up shipping options on the shipping classes page. Even if you do not plan to do any shipping, a class of “no shipping” will need to be created. You will use “no shipping” when processing sales for in-person pick up or intangible goods. You need to input a ship-from address, even for the no-shipping option. Once you have created your shipping class scroll down to check off the options that match the shipping class name and input pricing as needed. Also make sure to always assign “no tax” to all shipping options, even options
that have no associated shipping charges. You can set up as many other shipping options as you need such as ground shipping or express shipping based on quotes for from vendors such as UPS and the postal service. As you add each new shipping class name the new shipping class options will become available at the bottom of the page. Keep in mind that any option other than no shipping should require a shipping address from the customer.

**Products** Now you are ready to start adding products. Marketplace can be used for the sale of both tangible goods like TShirts and keychains or intangible goods like membership dues or event registrations. We are going to start with an example of an intangible product.

You can enter overview as well as detailed descriptions of your products and input a base price. This price can later be modified based on different options the customer may select. Verify your payment options. You will need to select default shipping and tax settings. Remember that every product and associated shipping must be set to the “no tax” option. You can also upload images as appropriate. We will not set up any options for this product. You will be asked to click on the random stock number generator even for intangible goods. You can set a maximum quantity per order. Setting an inventory can be useful for intangible goods if you want to set a limit on total sales. Finally all intangible goods should be set to auto fulfill.

Your product status should be set to disabled until you are ready to publish it to the webstore. The mobile status will need to be disabled separately.

You will be asked to assign categories, both at the mall level and at the store level. Marketplace defaults to having all products appear on the store homepage. We are going to remove that option and specify that our product will appear in the category Membership dues. Save your selections and your product will now appear in your available products list.

Now we will add a tangible product and go through the process of configuring options for your customers to choose. Tangible goods are those you either need to ship or physically hand to the customer. You will start with the same basic steps of adding a description, setting a base price and verifying payment options. Since we now have a physical product I will select a default shipping of standard shipping. You would want to keep it as no shipping if most of your sales will be for pick up. Set the tax status to no tax.

This time we will upload a photo to the webstore. Guidelines for image size are provided.

Now to select options. You can set up many different options for your products. Marketplace automatically offers two of the most common options which are size and color for apparel. You can also create custom options. Be careful when adding options, as you cannot delete extra ones and will have to start over. Each option you create will have to be set up separately but this allows you the flexibility to price and process them differently.

Once you have set up all your different options and move to the next screen an inventory record is created for each version of the product. The following steps will have to be completed for each of the versions.

Tangible goods should have an initial inventory. Marketplace will keep track of your remaining inventory of each type as sales are fulfilled. Fulfilling finalizes the order in the system. Tangible goods should not be set to auto-fulfill. They are to be manually fulfilled only when the customer has received or been shipped their order. Intangible goods, such as dues and registrations are the only items that can be set to auto-fulfill. You can give the buyers the option to backorder products.

You will repeat these set up steps for each version of the product that has been created. Keep your product disabled until your changes have been reviewed.

Now you can assign your product to a category both at the mall level and at the store level. If your product is assigned to a category, you should remove it from the store home page. Otherwise it will appear twice.

Your new product will now appear on your products list. You can disable the mobile view on this screen.
Modifiers  Modifiers are custom fields that allow you to choose the data you collect at the time an order is placed. Modifiers can be created at the order level or linked to specific products. Once you have created a product use the Add Modifier option to add custom fields. You have the option to create a drop-down list of selections, a freeform text box response or allow the user to make multiple selections. Marketplace automatically collects certain information as a part of the transaction. Customer details such as name, mailing address and payment method. Some examples of additional information you may wish to collect - Is the purchaser an organization member or non-member? Will they require event parking? Do they have any dietary restrictions? If needed you can also modify product pricing depending on the customer’s selections.

In addition to product-level modifiers you can also set order-level custom fields. A user-level modifier will come up at the time of order completion. It will apply regardless of which products are purchased. Use this level of modifier for information you wish to collect for all customers. This can be combined with product-level questions.

SOFC Review – Your next step will be to enable your store to the Marketplace Mall. Before enabling the changes to your storefront, please contact the SOFC Marketplace representative with a list of the updates you have made. The Marketplace rep will review the changes to verify they comply with Marketplace rules. Please do not neglect this step. It is much easier to take the time for this review than to deal with refunds and tax issues after the fact.

Enable – Once your changes have been approved, enable them at the store level and also at the product level. You can enable all the products at once or select only the products you want. Make sure that in addition to enabling them on the web you also enable them for mobile availability. Please note that processing this change has been edited for time, this usually takes 3 to 5 minutes. You should not click out of the window until the enabling process is complete. Once enabled, the new options become available immediately. You can click on View Store from the Marketplace Homepage to verify the changes appear the way you want them to. If the display is not correct, you can alter product categories and images until you are happy with the results. You will see a status of Preview. Please do not use this, it does not function properly.

Managing Your Store

Order Search – The Order Search screen allows you to search for orders using combinations of search terms including order number, customer name and date range. Order search enables you to start the shipping and order fulfillment process. Search results can be exported to .csv

Order Fulfillment – The Fulfill Orders menu link will display any unfulfilled orders in process. All non-tangible goods should be set to auto-fulfill. Only tangible goods will require manual fulfillment. Go to the “Fulfill Orders” menu and perform a search of your outstanding unfulfilled orders, make your selections and click “Process Fulfillment”. Review the order information and click “Accept Payment” to complete the fulfillment process.

Marketplace will hold funds for a two-week window after the order is placed. If orders are not fulfilled in that timeline, the funds are no longer guaranteed. If this happens you will need to email the SOFC to cancel the order with an advisor’s approval. The customer will then have to reorder through the website.

Fulfilling orders in a timely manner will avoid this scenario.

Marketplace Reports - The primary reporting function that your organization will use is “By Product” which provides transaction information along with any modifiers that were chosen at the time of setup. You will need to set a begin date and end date for the report. Report results can be exported.

Proceed to the next step to register your completion of Marketplace Training.