



MarketPlace Manual

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Introduction

Marketplace will work for the majority of online ecommerce needs. It enables a department to create an online store, add inventory, set prices and begin selling online products.

If you have a special need that goes beyond the capabilities of an online store, you should work with OUHSC IT to prepare an application that meets your special needs.

The Shopper's Experience

Shoppers in your Marketplace site will see the result of the choices you have made creating the site. Your decisions about site structure affect how shoppers will locate and purchase products. This table shows the major features shoppers will see while using your site.

What the shopper is doing...	What the shopper sees...
Opening your shopping site	<p>The shopper first sees your site's main graphics and links to all its categories and stores. The shopper also sees drop-down lists of all categories and stores, any special announcement you have entered for the site, and the link to your privacy policy.</p> <p>Throughout the shopper's visit to your site, a bar near the top displays links to pages the shopper has visited for quick site navigation.</p>
Looking for products in Marketplace categories	<p>When the shopper goes to a Marketplace category, the onscreen display will be based on the category layout selected by the administrator. The shopper will see the category graphics and links to subcategories, and may also see names, prices, descriptions, and graphics for products in the category.</p> <p>The shopper can link to any product's details, and in some layouts can select quantity and product options and add the product directly to the cart.</p>
Entering an online store	<p>When the shopper enters an online store, the display includes the store's name and main logo graphic, any special announcement for the store, and links to the store's return policy and shipping rates. The shopper can also click the store contact's name to send an e-mail to that person.</p>
Looking for products in online stores	<p>When the shopper enters an online store, the display will depend on the category layout selected by the store manager. The shopper will see the category graphics and links to subcategories, and may also see names, prices, descriptions, and graphics for products in the category.</p> <p>The shopper can click to view any product's details, and in some layouts can select quantity and product options and add the product directly to the cart.</p>

Viewing a product's details	In the product's details, a shopper will see the product's name, its long description, and its price. From this view, the shopper may choose from any product options, select the quantity to order, and add the product to the shopping cart.
Viewing the current shopping cart	Shoppers see the shopping cart whenever they have added products, or whenever they click the view cart icon. For each product in the cart, shoppers will see the product name, the name of the store from which it was purchased, the quantity selected, and the total order charge, excluding tax. In the cart, the shopper can change the quantity of any product to be purchased and can choose from available delivery methods. The shopper can then continue shopping or proceed to checkout.
Checking out—entering information	In the first checkout screen, previously registered shoppers can log in and use their stored shipping and billing information. First-time shoppers can enter shipping and billing information and choose to register a user name and password or continue without registering.
Checking out—reviewing the order	After entering billing and shipping information for checkout, the shopper sees an order review page. This page shows the shopper's billing and shipping information, names of stores where products were purchased, purchased product information, selected delivery methods, and totals for products, tax, and shipping. In this page, the shopper enters credit card information and can choose to name the payment method, storing the information for future visits to the site. Then, the shopper submits the order.
Reviewing the order confirmation	After the shopper submits the order, an order confirmation e-mail is generated automatically and sent to the shopper. This confirmation e-mail shows the detail from the online order review and includes the store contact names for all stores where purchases were made.
Viewing account details	In the shopping site, registered users may click the My Account icon to log in and view or change account details. In the account details, shoppers see a list of all their submitted orders by order number and status—shipped, in progress, or canceled. Shoppers can also view and update the stored billing address; view stored shipping addresses and add new ones; view and add payment methods; and change the login password or password hint.
Reviewing the shipment confirmation	When the fulfiller completes an order fulfillment, an automatically generated e-mail is sent to the buyer. In this e-mail, the buyer is given notice of which items and quantities have been shipped and the charge that has been made to the credit card. The e-mail shows the order number, store name, method of delivery, and the fulfiller's e-mail address. It also notifies the buyer that if other items were ordered, they will be shipped separately.

Marketplace User Roles

When a Marketplace Operations Center user logs in, the home page displays different task links depending on the user's assigned roles. For instance, administrators will see the link, "Administer Marketplace," while store managers will see the names of the stores they manage and the link, "Manage Store."

To perform the tasks for a role, a user must be assigned that role. For example, a store manager is not automatically the store contact, but becomes the store contact when that role is assigned. A Marketplace Operations Center user can have multiple roles, such as when a store manager also has a fulfiller role or store contact role.

This table shows the tasks available for each user role.

Marketplace Administrator	Can change the setup features of the Marketplace shopping site, such as its graphics and its delivery methods. Adds new stores and store managers for the shopping site. Can view Marketplace financial reports The Bursar's Office is OUHSC's Marketplace Administrator.
Accountant	Can view Marketplace financial reports.
Store Manager	Sets up an online store and can change its setup features, such as graphics, the displayed store name, and shipping rates. Adds and manages products for the store. Adds and manages roles for both fulfiller types, store clerks, and store contacts. Can view the store's financial reports.
Fulfiller	Fulfills orders and can review both pending and completed orders.
Fulfiller with refund and cancel rights	Fulfills orders and can cancel orders and issue refunds. Can review pending and completed orders.
Store Clerk	Can add new product information and edit information for existing products.
Store Contact	Serves as a store's customer contact. The store contact's e-mail address appears on order confirmations e-mailed to buyers.

Orders and Fulfillment Events

An order is a set of products purchased in a single shopping cart submission, with the same payment method, to be shipped to the same address.

Each order may result in separate fulfillment events. A fulfillment includes the products in an order that share a delivery method and shipping class.

A shopper may submit a cart that contains several products, selecting a delivery method for each product. When the shopper submits the order, all the purchased products are submitted together and the shopper receives an order number for the entire order.

Within the order, any products that come from the same store and that share both a shipping class and a delivery method will be added to a single fulfillment event. One order may have multiple fulfillments. Each of these fulfillment events will have the same order number that the buyer received for the entire order.

Marketplace fulfillers complete the pending fulfillments for an order. The fulfillment events group purchased products by store, delivery method, and shipping class. This allows the fulfiller to process one fulfillment for each group of items that may be shipped together.

Fulfilling Orders

Marketplace fulfillers complete four main steps in order fulfillment: accepting payment, generating a packing list, entering shipment tracking numbers, and sending shipment confirmations to buyers.

Note: When an order is fulfilled, the buyer receives an e-mail stating which items have been shipped and the total charged to the credit card. Marketplace participants must determine individual policies for the timing of actual shipments or deliveries with the online fulfillment process.

Note: Once the buyer's credit card has been charged, complete all remaining fulfillment steps. When you leave the fulfillment, you will not be able to return and complete steps. Do not skip steps unless you are sure they do not apply to the order.

1. In the home page, click the Fulfill Orders link. The Order Fulfillment page that opens shows the list of pending fulfillments.
2. To begin fulfilling an order, click its Process Fulfillment button. The page that opens shows the order's details and the four steps for completing the fulfillment:
3. **Accept payment.** To charge the shopper's card, click the Accept Payment button and then confirm the charge.
4. **Print the packing list.** You will not be able to return to the packing list later. If you need a copy, you must print it in this step. To print one or more copies of the packing list, click the Print Packing List button, then select printing options.
5. **Enter the tracking number.** You will not be able to return to the tracking number later. If you have a tracking number, enter it in this step. Enter the tracking number in the field below the order detail, then click the Proceed to Step 4 button.
6. **E-mail the shipment confirmation.** You will not be able to return to shipment confirmation later. To inform the buyer about items shipped and charges to the credit card, send the confirmation e-mail in this step. Click the Send Email button to generate and send the shipment confirmation to the buyer.
7. Click the Next Fulfillment button to process the next pending fulfillment, or click the Return to Order Summary link to see the list of pending fulfillments.

Accepting Payment for an Order

Accepting payment is the first step in the fulfillment process, and charges the buyer's credit card. Charges for shipping and tax are included in this payment. Once you have charged the card, you should always complete the four-step fulfillment process so that the buyer receives confirmation of the shipment to which the charge applies.

1. In the home page, click the Fulfill Orders link. The Order Fulfillment page that opens shows the list of pending fulfillments.
2. To begin fulfilling an order, click its Process Fulfillment button.
3. Check the quantity ordered, and verify that you are able to ship that quantity.

Note: Step 4 applies only to fulfillers with refund/cancel privileges:

4. If you need to cancel part or all of the order, change the number in the Quantity Ordered field to the quantity you will actually ship. (For cancellations, change the quantity to zero.) Then, click the Update Items button.

Note: When you change the quantity ordered, the buyer will not automatically be notified of partial or total cancellations. If your policies require that you notify the buyer, you must send this communication yourself. The Buyer Info section of the Order Fulfillment page includes the buyer's e-mail address, which you can use to communicate directly with the buyer.

4. To accept payment, click the Accept Payment button. You will be prompted to verify the charge to the buyer's credit card. Click OK to continue.

After accepting payment, continue to the next fulfillment step, printing the packing list.

Printing the Packing List

Printing the packing list is the second step in fulfilling an order. The packing list shows shipment and stock number information for all items in the order. It does not show prices or payment information.

Note: You cannot return to the packing list once you have closed it. You may want to print multiple copies so that you can keep copies for your records.

1. After you have accepted a payment and clicked the Proceed to Step 2 button, the Print Packing list button will appear.
2. Click the Print Packing List button. A printable packing list will be generated and appear in a separate window.
3. To open the print dialog, press CTRL+P or select Print from the File menu.
4. In the print dialog, enter the number of copies to print, then click the Print button.
5. After you have finished printing, click the Proceed to Step 3 button to go to the next fulfillment step, entering a tracking number.

Processing Refunds

A fulfiller with refund and cancel rights can process refunds for completed orders, crediting amounts back to the buyer's credit card. The amount credited includes only the purchase price of the products. Shipping and tax charges are not credited back to the buyer's card.

Note: To ensure accurate processing, do not credit an amount on the same day that it was charged to the buyer's card.

Note: Marketplace will automatically generate and send an e-mail to the buyer. This e-mail details the credited amount and the products for which the refund was made.

1. In the home page, click the store's Fulfill Orders link. The Order Fulfillment page will open.
2. In the Search by Order # field, enter the order number for the refund, then click the Go button. The page will display all of the order's fulfillment events.

Note: If you do not know the order number, select Completed from the Show orders drop-down list, then click Go. In the list of completed fulfillments, locate the fulfillment event to be refunded.

3. Click the View Details link for the fulfillment that requires a refund.
4. In the fulfillment details, locate the Qty Purchased and Qty Returned fields. In the Qty Returned field, enter the quantity of products for which you want to refund the purchase price.
5. Click the Process Refund button, then confirm the credit to the customer's card.
6. Click the Back to order summary link to return to the list of orders.

Canceling Part or All of an Order

Only fulfillers with refund and cancel rights may cancel part or all of an order for a purchased product. To cancel part of an order, update it to show the quantity you will ship. To cancel an order, change its quantity to zero.

Note: When you change the quantity ordered, the buyer will not automatically be notified that the order has been changed or canceled. If your policies require that you notify the buyer, you must send this communication yourself. The Buyer Info section of the Order Fulfillment page includes the buyer's e-mail address, which you can use to communicate directly with the buyer.

1. When accepting payment for an ordered product, check the quantity ordered, and verify that you are able to ship that quantity.
2. To cancel part or all of the order for a product, change the number in the Quantity Ordered field.

To cancel part of an order for a product, select the number in the Quantity Ordered field and enter the new number. Then, click the Update Items button and when prompted, confirm the change to the order.

To cancel the entire order of a product, change the number in the Quantity Ordered field to zero. Then, click the Update Items button and when prompted, confirm the change to the order.

3. To continue to the next fulfillment, click the Next Fulfillment link, or click the Back to order summary link to return to the list of pending orders.

Viewing Completed Orders

A Marketplace fulfiller may view either the list of pending orders or the list of completed orders. You may view either list by year, month, and day.

In the home page, click the store's Fulfill Orders link. The Order Fulfillment page that opens shows the list of pending fulfillments.

To view completed orders, select Completed from the Show orders drop-down list, then click the Go button.

To view details for a completed order, click its View Details button.

To return from completed orders to pending orders, click the Show All Pending Fulfillments link.

To show orders by date, select year, month, or day options from the Show orders drop-down lists, then click the Go button.

Store Financial Reports

Marketplace store managers can view a year-to-date sales report for the stores they manage. To view a store's report, the manager clicks the store's View Financial Reports link in the home page.

The manager can sort the sales report by year, month, and day. The report shows all products sold during the selected time frame, by product name, stock number, quantity sold, and amount paid in each order. (Amounts paid do not include shipping and tax charges.)

The report totals the number of inventoried items sold and the store's gross profit from the sales.

Setting Up a New Store

After an administrator creates a store, its store manager completes the store setup. The first time a store manager views the general Store Management page, it will display information entered when the store was created. The store will remain offline until the store manager places it online.

A store should remain offline until these four setup steps are complete:

- Update the store's general information.
- Set up in-store categories for product display.
- Create at least one shipping class, which sets shipping rates for the store's products.

- Add products to the store by using the New Product Wizard or by importing them from a file.

To enable the store for online display when setup is complete, follow these steps.

1. In the home page, click the store's Manage Store link.

In the Marketplace Store Management Page, the first line shows whether the store is currently online or offline. The online or offline status of the store is also displayed above the task bar.

2. To bring the store online, click the Bring Online button.

Changing a Store's General Information

The first time a manager views a store's general Store Management page, it will display information entered by the Marketplace administrator who created the store. The store manager should update this information before bringing the store online.

Once the store is set up, the manager can update its general information at any time, whether the store is offline or online.

1. In the home page, click the store's Manage Store link. The general Store Management page will open.
2. In the first section of the Store Management page, update any of the following items as needed, then click the Save Changes button to apply the new information.

Store Name - This name identifies the store within the Marketplace Operations Center.

Store Display Name - This store name appears in the online shopping site.

Return Policy - A link to this policy appears in the home page of the online store. The return policy applies to the entire store; special policies for individual products must be included in their product information.

Special Announcement - Any special announcement is displayed on the home page of the online store.

3. In the second section of the Store Management page, upload new a logo image as needed.
 - a. To add or change the logo image, click its Upload link.
 - b. In the window that appears, enter the path or browse to the image file to select it.
 - c. Click the Upload Now button, then confirm the upload at the prompt.

Note: The logo image must be saved in GIF, JPEG, or PNG format, with a maximum file size of 50,000 bytes.

4. After you have saved all changes to the store's general information, click any task bar link to go to its task.

Changing the Store's Category Structure

A store manager can change the store's category structure by adding, renaming, or removing categories and subcategories, or by changing their layouts and graphics.

Note: If the store is online, changes to categories will be visible to shoppers immediately. (New categories become visible when products are placed in them.) If you are making significant changes that will affect those shoppers' navigation, you may want to move your store offline while you make those changes.

1. In the home page, click the store's Manage Store link.
2. In the task bar, click the Categories link.
3. To add a new top-level category, click the Add New Top-Level Category link that appears under the task bar. In the window that opens, enter the category name and select its layout, then click OK and confirm the new category at the prompt.
4. To manage an existing category, locate it in the categories list and click one of its task links:

Edit - Opens the Edit Category page. Here, you can rename the category, change its layout, or upload new logo and thumbnail images for the category. (If a category is renamed, all of its subcategories will include the new name.)

Delete - Deletes the category. You cannot delete a category if it or any of its subcategories contains products. First, move the products to another category, then delete the category.

New Sub-Category - Opens the window where you enter the new subcategory name and select its layout.

5. To return to the list of categories, click the Categories link in the task bar.

Note: Store managers can also move products from one category to another to help streamline navigation for buyers.

About Category Layouts

Marketplace administrators can select from the three category layouts for the Marketplace site categories and subcategories. Store managers can apply the same three layouts to in-store categories and subcategories.

Category layout affects how products are displayed to the shopper and how the shopper navigates through the selection of items.

Layout	Notes
Name and Price	<p>The shopper sees a list of products in the category and the price of each product. Thumbnail images are not used in this layout. When the shopper clicks a product name, the product's full-size image and long description are displayed.</p> <p>If a product has options such as size or color, the shopper cannot add it to the cart without first selecting options from the full-size image and long description page. If the product has no options, the shopper can add it to the cart from the name and price list.</p>
Thumbnail	<p>The shopper sees the thumbnail image and name for each product in the category. When the shopper clicks a product's name or image, its full-size image and long description are displayed.</p> <p>The shopper cannot add the product to the cart without viewing the full-size image and long description.</p>
Detailed	<p>The shopper sees the thumbnail image, short description, name, and price for each product in the category.</p>

	The shopper can add the product to the cart immediately or can click the product's name to view its full-size image and long description before adding it to the cart. For products that have options such as size or color, the shopper will be prompted to select from those options if the product is added to the cart directly from the thumbnail view.
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About Shipping Classes

Store managers use shipping classes to assign shipping rates and delivery methods to a group of products. The shipping class consists of selected delivery methods (such as U.S. Post or other major carriers) and the rates charged for each.

A store manager creating a shipping class selects the delivery methods that the class will use. For example, one shipping class may allow overnight delivery, while the shipping class for a different type of product might not include overnight delivery.

For each delivery method, the store manager sets the base rate for shipping an item from the class and a rate for additional items shipped from the class. When two items from a shipping class are purchased together for shipment by the same method, the buyer is charged the base rate on the first item shipped and the per-additional-item rate on the second item shipped.

A store manager adding a new product selects a shipping class for that product. The shoppers who purchase the product will then select a delivery method from those included in the product's shipping class. The shopper will then be charged the shipping rates associated with the shipping class and delivery method.

Setting Up a Store's Shipping Classes

Shipping classes group products using shipping rates and allowed delivery methods. A store manager must set up at least one shipping class before adding products to a store.

For each shipping class, the manager first selects the delivery methods that are allowed for the products to be shipped. (The delivery method list is created by the Marketplace administrator.) Then, the manager sets two rates: the base shipping rate for each delivery method used, and the rate for each additional item for each delivery method used.

Note: Base and per-item rates for a delivery method will apply to all products that use the shipping class. When calculating base and per-item rates and when assigning products to the shipping class, be sure that the charges you set are sufficient to cover the products' shipping costs, regardless of the combination of products that might be delivered together.

Note: Shoppers may click the Shipping Rates link for your store to see shipping class information. When renaming shipping classes, you may want to consider using names that will help shoppers identify a product's shipping class.

Note: Because delivery methods are shown for every shipping class, do **not** use a delivery method name (for instance, U.S. Postal Service) as the name for a new shipping class.

1. In the home page, click the store's Manage Store link.
2. In the task bar, click the Shipping Rates link.
3. Under the task bar, click the Add New Shipping Class link. The Shipping Class window will open.
4. In the Shipping Class window, enter the name of the shipping class and click OK. You will see the new shipping class in the list of current shipping classes, and a shipping rate table for the new class will appear in the list of tables.
5. The new shipping rates table includes a row for each delivery method set up by the Marketplace administrator. For each delivery method you want to use in the shipping class, mark the Enable checkbox.

Note: If the shipping rates table does not include a delivery method needed for the shipping class, contact your Marketplace administrator.

6. For each enabled delivery method, enter the base shipping charge for products in the class. Then, enter the shipment charge for additional products from the same class.

Adding a New Product

As soon as you add a new product, it becomes visible to shoppers and available for purchase. However, if you are adding a product and are not sure of some of its information, you can finish adding the product but choose to disable it so that it does not appear online. Then, after you have collected the information you need, edit the product's entries and enable the product for display.

Note: You must create at least one shipping class before you can add new products. To save time, it also may be helpful to collect the following pieces of information before you start to add the product.

- The shipping class to use, from those you have already created.
- The tax class for the product. (Tax classes, if used, are set up by the Marketplace administrator.)
- The locations and filenames of any graphics for the product.
- If inventory will be tracked, the initial quantity available.
- The product's stock number. If the product has options that result in separately tracked articles, have available all the stock numbers that apply and prices for each article, if different from the product's base price.
- If the product has options that result in separately tracked articles, have available any article prices that differ from the product price.

1. In the home page, click the store's Manage Store link.
2. In the task bar, click the Manage Products link.
3. Under the task bar, click the Add a New Product link. Then, step through the pages of the New Product Wizard, adding all required product information.

In the first page of the wizard, enter the product's name, long description, short description, and price. If product options affect price, enter the product's base price here.

In the second page, enter the product's shipping class, tax class, special authorization (if used), and shipping/handling message, if any.

In the third page, upload any images for the product.

In the fourth page, choose whether to add options for the product.

In the fifth page, specify whether the product's inventory is to be tracked, whether the product is back-orderable, and the product's stock number. If you do not have a stock number, you must assign a random stock number before continuing.

In the sixth page, confirm the addition of the new product. You may choose to temporarily disable its display.

In the final page, select the Marketplace categories and store category in which you want to display the product.

4. When you have added the new product, click any link in the task bar to exit the Product Wizard and begin a new task.

About the Product Information Fields

This table shows the fields and options used when adding a new product or editing product information. The first column of the table shows the page where you will see each field as you add a new product.

Product Wizard Page	Field or Option Name	Description
New Product Wizard, Begin	Product Name	Shoppers see the product name when browsing through categories and in order confirmations. Fulfillers also see the product name when fulfilling orders. Maximum 50 characters.
	Short Description	In the detailed category layout, shoppers will see the short description when selecting the product. Maximum 100 characters.
	Long Description	In all category layouts, the product's long description is available to the shopper. Maximum 2000 characters. Note: You do not need to include product options such as sizes and colors in the long description. If such options are available, you will enter them later in the New Product Wizard, and they will be visible to shoppers who select the product.
	Price	Shoppers are shown the product's price before adding it to the cart. The price of each purchased product is also included in the order confirmation. If your product has options such as size and color, enter its base price in this field. You will be able to enter separate prices for each combination of options later in the New Product Wizard, if needed.
New Product, Misc Info	Shipping Class	Choose from the shipping classes you have already set up. If you need to create or modify a shipping class for the item, complete the New Product Wizard, but disable the product. Then, adjust your shipping classes before editing the product's information and enabling the product.
	Tax Class	Choose from the tax classes that have been set up by the RevenueStream administrator. If you do not know which tax class applies to your product, contact your RevenueStream administrator for more information.

	Special Authorization Required	If the shopper must provide authorization to purchase the product, mark the Yes option. (For example, a buyer might need to be a current student to be authorized for the purchase.)
	Special Authorization Prompt	If authorization is required, enter text that describes the information the buyer must enter. 200 characters maximum.
	Shipping/handling message	Enter any shipping/handling message for display to the fulfiller. 100 characters maximum.
New Product, Upload Images	Upload full size image	Must be in GIF, JPEG, or PNG format, with a recommended width by height of 250 x 250 pixels, and maximum size of 50,000 bytes.
	Upload thumbnail image	Must be in GIF, JPEG, or PNG format, with a recommended width by height of 80 x 80 pixels, and maximum size of 50,000 bytes.
Does New Product Have Options?	Does product have options?	<p>If the product has options such as size or color that result in individually tracked articles with their own inventory counts and stock numbers, mark Yes, then click the Continue button.</p> <p>If the product has options, then the Product Wizard will open separate pages for each article, where you can enter its inventory count, stock number, price, and back-orderable status.</p>
New Product, Additional Info	Track inventory?	<p>Note: If you entered product options for individually tracked articles, this page will not appear.</p> <p>Designate whether you want to track the product's inventory. If yes, enter the initial quantity. Click the Continue button.</p>
	Back orderable?	Designate whether the product will be available on back-order.

	Stock #	<p>A stock number is required. Stock numbers are included in a buyer's order confirmation for each purchased product.</p> <p>If you do not have a stock number for the product, click the Assign Random Stock # button.</p>
Add New Product to Store	Disable this product for now.	<p>To disable the product so that it does not immediately display in your online store, mark the Disable this product for now checkbox. To enable the product for immediate display, leave the checkbox empty.</p> <p>Click the Add Product button to continue.</p>
New Product, Assign to Categories	Choose Marketplace Categories	<p>The new product will be displayed online in the categories you select. Products within categories are displayed in the order they are added.</p> <p>You may select from zero to three RevenueStream categories.</p> <p>To select multiple RevenueStream categories, press the CTRL key and click the category names.</p> <p>To deselect a category, press the CTRL key and click the category name.</p>
	Choose In-Store Category	<p>In your store, the product will be displayed in the category you select. You may select only one in-store category. Products within categories are displayed in the order they are added.</p>

Adding a Product with Options

Some products may have options, such as size or color, that require their own inventory numbers and prices. For instance, a t-shirt product may come in several sizes, with a different price for some sizes. A store manager can enter such products and their options through the Add New Product wizard. Products with options cannot be imported from a file.

1. In the home page, click the store's Manage Store link.
2. In the task bar, click the Manage Products link.
3. Under the task bar, click the Add New Product link.
4. Use the Add New Product Wizard to add the product's basic information.

In the first page of the wizard, enter the product's name, long description, short description, and price. If product options affect price, enter the product's base price here. You will be able to enter additional prices when you enter the product options.

In the second page, enter the product's shipping class, tax class, special authorization (if used), and shipping/handling message, if any. All entries here will apply to all of the product articles with different options.

In the third page, upload any images for the product.

5. At the prompt, "Does this product have options associated with it, such as size or color, that affect inventory or stock #?" select Yes and click the Continue button.
6. In the product options list, mark the checkbox for each option that applies to your product. To add an option besides size or color, mark the Other checkbox and enter the name for the option. Click the Continue button.
7. For each option type, fill in all the values that apply for your product. For example, if you selected the size option, you might enter the values small, medium, and large.

Note: You may enter up to six values for each option on this screen. If your option requires more than six values, click the Add More button to open additional entry fields.

8. The Add New Product wizard will next display entry fields for each combination of options. Each combination of options results in one article.

Note: If any particular combination should not be included in the online inventory, mark its checkbox. This particular article is not available. For example, if you had entered the size options small, medium, and large, and the color options red, blue, and green, but were not selling the product in the small, red combination, then you would mark the small, red article as not available.

Specify these settings for each article:

- **Track inventory.** Each article can be tracked separately. For instance, you could track the quantity of red shirts without tracking the quantity of blue ones.
 - **Back Orderable.** This setting is individual for each article. For instance, you could set the article "large t-shirts" as back-orderable but "small t-shirts" as not back-orderable.
 - **Stock #.** You must enter a stock number for each individually tracked article. If you select a random stock number for the first article, all other articles automatically will be assigned random stock numbers, which you may edit.
 - **Price.** Each article may have a price that differs from the product's base price. If the prices for articles vary, then the buyer will see the range of prices when selecting the product. Then, when the buyer adds the product to the cart, its price will be determined by the options the buyer has selected.
9. When you have finished supplying all information for product articles, complete the Add New Product wizard by adding the product to the store.

Creating a Product Import File

This imported list does not include product options such as size or color. Products with options such as size and color must be added individually through the New Product pages in the Operations Center.

File Format: Comma-separated values (CSV)

The file must use the CSV format, in which values are separated by commas. You may use optional quotation marks surrounding a value. For example, the values **Item 1,"Item 2",1234,"Item,3","Item ""4""** would yield these entries:

Item 1

Item 2

1234

Item,3

Item "4"

File Format: Required Column Headings

These columns are required in the file exactly as shown here. Enter the columns in the order shown. The column headers must appear on the first row or line of the file.

Column Header	Description	Notes
NAME	Name of the Product	Maximum 50 characters.
SHORT_DESC	Short Description of the Product	Maximum 100 characters.
LONG_DESC	Long Description of the Product	Maximum 2000 characters.
SHIP_CLASS	Name of the Shipping Class for the product	Must match an existing shipping class name.
PRICE	Price of the Product	Use the format x.xx, with up to two decimal places. Do not use commas or dollar signs. Do not use negative numbers.

File Format: Optional Column Headings

These columns are optional. If you include one of these columns, its column header must appear on the first row or line of the file.

Column Header	Description	Notes
QTY	Quantity available	If this column is not used, the quantity available will not be tracked. You may change this entry later in the Edit Product page.
BACK_ORDERABLE	Signals whether the product may be purchased with back-order status.	Set to Y or Yes if the product is back-orderable. Set to N or No if the product is not back-orderable. If this column is not used, the setting will be saved as "not back-orderable." You may change this setting later in the Edit Product page.
STOCK_NO	Stock number	Maximum 30 characters. If this column is not used, a random number will be assigned. You may change this number later in the Edit Product page.
ENABLED	Signals whether product should be enabled for display in the online store.	Set to Y or Yes to enable the product for display immediately. Set to N or No to leave the product disabled. If this column is not used, the product will be enabled and displayed for purchase in the online store. You may change this setting in the Edit Product page.
AUTH_REQD	Signals whether authorization is required to purchase the product.	Set to Y or Yes if authorization is required, otherwise set to N or No. If the column is not used, the product will be saved with "no

		authorization required." You may change this setting later in the Edit Product page.
AUTH_PROMPT	Prompt displayed to the user if authorization is required	Maximum 200 characters. Must be filled in if authorization is required.
ON_SALE	Signals that the product price is a sale price.	Set to Y or Yes if the product is currently on sale, otherwise set to N or No. If the column is not used, the product will be saved as "not on sale."
TAX_CLASS	Tax Class Name	If used, must match an existing tax class name. If the column is not used, the product will use the default tax class set up by the administrator.

Communications for Marketplace Users

When a Marketplace participant makes a change to site or store setup, the change may affect other participants' choices about setup or business operations. Therefore, it is important that Marketplace users communicate important changes and decisions with one another.

Note: Administrators and store managers can send e-mail directly from Marketplace to any user shown in the Manage Users page. In the Manage Users page, click a user's name to open a new e-mail addressed to that person.

This table shows some communications that may help Marketplace participants manage the online site more easily and efficiently.

User Role	Communication with Other Users
MarketPlace Administrators (OUHSC Bursar's Office)	<ul style="list-style-type: none"> • Notify store managers of any delivery methods that are added, renamed, or deleted. Stores may be using the delivery methods to be changed, or may want to use new methods. • Provide store managers information about tax classes, if used. Store managers assign tax classes to new products. • When a new store is added, notify its manager of the store name. If the manager is a new user, also communicate the user name and password for Operations Center login. • When you change a user's role, notify the user. (The user will also see the change at the next login.) • When you add a user, notify the new user of the user name and password for Operations Center login. • Notify store managers of changes to RevenueStream categories. Changes to categories may affect store managers' placement of products. • Before removing a category, notify store managers. They must move their products from the category before it can be deleted.
Store managers	<ul style="list-style-type: none"> • When you add a user, notify the new user of the user name and password for Operations Center login.

<p>Fulfillers with refund and cancel rights</p>	<ul style="list-style-type: none"> • If your policies require it, notify the buyer when the quantity shipped will be less than the quantity ordered. When you reduce the quantity that a buyer has ordered, the buyer will not automatically be notified that part of the order has been canceled. • If your policies require it, notify the buyer if an order has been canceled. When you change the quantity ordered to zero, the buyer will not automatically be notified that the order has been canceled.
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Adding New Marketplace Users

<p>MarketPlace Administrators (OUHSC Bursar's Office)</p>	<p>can add</p>	<p>Marketplace Administrators</p> <p>Store managers</p> <p>Accountants</p>
<p>Store Managers</p>	<p>can add</p>	<p>Fulfillers</p> <p>Fulfillers with refund rights</p> <p>Store clerks</p> <p>Store contacts</p>

Note: The user name you create in these steps cannot be changed either by you or by the new user. You may want to select a user name that will be easy for the user to remember. The new user will be able to change the password you have provided.

1. In the home page, click the link to go to the task bar.

Marketplace Administrators, click the Administer Marketplace link.

Store managers, click the Manage Store link for the store where the user will be added.

2. In the task bar, click the Manage Users link.
3. Under the task bar, click the Add New User link.
4. In the Add a New User page, enter the user name, password, and password confirmation. Your password must contain at least four characters.

Note: User names must be unique. If the user name you enter has already been assigned to an Operations Center user or registered by a buyer, Marketplace will prompt you to enter a different user name.

5. Select the user's role from the Assigned Role drop-down list.
6. (Optional) If you are adding a store manager, you may select the store to be managed from the Store drop-down list.
7. To add the user, click the Submit button. Or to cancel the process, select any link from the task bar.

Note: You will need to notify the new user of the user name and password for Operations Center login.

Miscellaneous Notes

Store	Logo	Recommended W x H: 150 x 300 pixels
Product Categories	Type	Detailed, Thumbnail, and Name & price
	Logo	Recommended W x H: 150 x 300 pixels
	Thumbnail	Recommended W x H: 80 x 80 pixels
Products	Name	50 characters maximum
	Short Description	100 characters maximum
	Long Description	2000 characters maximum
	Thumbnail	Recommended W x H: 80 x 80 pixels
	Full Picture	Recommended W x H: 250 x 250 pixels
Example Stores	University of Idaho	marketplace.uidaho.edu
	St. Johns University	shop.stjohns.edu