TouchNet Marketplace

TEXAS A&M UNIVERSITY – CORPUS CHRISTI

Spring 2010
Objectives

- Marketplace – An Introduction
- What is uStore?
- What is uPay?
- Reporting
- GL Interface
Enables TAMUCC to build and operate secure, web-based shopping cart applications and online payment pages.

Connects buyers and sellers electronically, making it easy for students, parents, alumni, and the community to do business with the campus.

Uses TouchNet Payment Gateway™ for electronic payment processing;
Marketplace: Introduction

- Uses the Marketplace Operation Center as the web based software interface that allows you to build and manage online shopping sites and online payment pages;

- Uses the familiar shopping cart theme to allow buyers to browse and make purchases online.

- Is a self-contained e-commerce solution, combining online storefronts with inventory control, order fulfillment, and financial reporting.
Marketplace includes three web-based applications:

- Marketplace Universal Stores (uStores) shopping site
- Marketplace Universal Payment (uPay) site
- Marketplace Operations Center administrative site
How can I use Marketplace?

- The first decision you want to consider is how to use Marketplace.
  - A key component in this decision is differentiating between the uStore and uPay functionality.
**What is uStores?**

- Think of uStores as a self contained online store.

- In it, you can create a store front, establish store specific settings, products and perform all online store activity such as order fulfillment and reporting. Most schools choose to have all of the activity occur with the uStore itself and require little to no interaction with other applications.
Some common ways uStores is used:

- uStores can be used in many ways. Some schools use stores for the selling of traditional products, such as school apparel. Other schools, including TAMUCC, have used uStores to sell non-physical products such as application fees and testing services.

- A few ways we have seen other schools use uStores:
  - Conference and Camp Registration
  - Donations
  - Parking Permits
  - Fundraising Events
  - Coordinating the issuing of non-chargeable events such as Graduation tickets or Freshmen Orientations
TAMUCC has utilized uStores for:

- Graduate Application Fees
- Academic Testing
- TAMUCC Marketplace
What is uPay?

- uPay is what’s referred to as a Payment Application.

- The goal of uPay is not to replace an existing Business Application but instead provide a PCI Compliant way for you to take payments for it.

- The uPay functionality focuses on the payment collection and reporting aspects of the process where as your Business Application would remain as the core business functionality.
An example of a Business Application could be a web site your team has written to sell athletic tickets, be used by non-students to apply for admissions or be an alumni website where alumnus could make donations or sign up for alumni events, to name a few.

The Business Application would handle the business process and link to the uPay site for the collection of the payment.
Some common ways uPay is used:

- One of the strengths of uPay is that it can operate largely independent of the specific Business Application. This means that a uPay site tied to an Athletic Ticket Business Application can be very similar to a uPay site tied to an Alumni Giving Business Application.

- However, here are a couple of alternate ways uPay can be used:
  - As a standalone application to collect donations.
  - As a standalone application to collect recurring donations.
TAMUCC has utilized uPay for:

- Graduate Application Fees
- Online Giving
- Student Orientation
- Alice Workshop
- Young Authors’ Writing Camp
uStore Reporting

- Merchants
  - Currently, Merchants are defined in Marketplace by functional areas (Academic Testing, Graduate Studies, Athletics, Institutional Advancement)
    - Can pull summary reports for respective Merchant.

- Store Managers
  - Can pull reports by product, stock number, product type or totals
  - Can dump reports to Excel for sorting by various modifiers

  (Examples on following pages.)
# Merchant Revenue Report

## Merchant Revenue Report

**Start Date:** 01/01/2008  
**End Date:** 06/30/2008

### Merchant Revenue Report

<table>
<thead>
<tr>
<th>Merchant Name</th>
<th># of Upay Transactions</th>
<th>Upay Transaction Totals</th>
<th># of Items Sold</th>
<th>Store Sales Totals</th>
<th>Shipping Totals</th>
<th>Tax Collected</th>
<th>Total Merchant Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Univ Advancement</td>
<td>0</td>
<td>$0.00</td>
<td>52</td>
<td>$5,950.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$5,950.00</td>
</tr>
</tbody>
</table>

### Store Name

<table>
<thead>
<tr>
<th>Store Name</th>
<th># of Fulfillments</th>
<th>Total Items Sold Amount</th>
<th>Total Shipping Amount</th>
<th>Total Item + Shipping Amount</th>
<th>Total Tax Collected</th>
<th>Total Amount with Tax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Have a Heart for Students</td>
<td>26</td>
<td>$5,950.00</td>
<td>$0.00</td>
<td>$5,950.00</td>
<td>$0.00</td>
<td>$5,950.00</td>
</tr>
</tbody>
</table>

### # Of Credit Card Transactions

<table>
<thead>
<tr>
<th>uPay Site ID</th>
<th>uPay Site Name</th>
<th># Of Credit Card Transactions</th>
<th>Total Credit Card Transactions</th>
<th># Of ACH Transactions</th>
<th>Total ACH Transactions</th>
<th>Total # Of Transactions</th>
<th>Total Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

There is no revenue on record for the selected time period.
# Store Revenue Report (Totals)

The default report shows current year information.

### Store Revenue Report

Start Date: 01/03/2008
End Date: 03/03/2008

<table>
<thead>
<tr>
<th>Store Name</th>
<th># of Fulfillments</th>
<th># of Items Sold</th>
<th>Item Amount</th>
<th>Shipping Amount</th>
<th>Item + Shipping Amount</th>
<th>Tax Collected</th>
<th>Total Amount with Tax</th>
</tr>
</thead>
<tbody>
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<td>$5,950.00</td>
<td>$0.00</td>
<td>$5,950.00</td>
</tr>
</tbody>
</table>

Export To CSV
### uPay Revenue Report

#### uPay Revenue Report For Osher Lifetime Learning Institute

<table>
<thead>
<tr>
<th>uPay Site ID</th>
<th>uPay Site Name</th>
<th># Of Credit Card Transactions</th>
<th>Total Credit Card Transactions</th>
<th># Of ACH Transactions</th>
<th>Total ACH Transactions</th>
<th>Total # Of Transactions</th>
<th>Total Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Osher Lifetime Learning Institute</td>
<td>3</td>
<td>$248.00</td>
<td>0</td>
<td>$0.00</td>
<td>3</td>
<td>$248.00</td>
</tr>
</tbody>
</table>

#### Additional Transactions

<table>
<thead>
<tr>
<th>Fulfillment Date</th>
<th>System Tracking ID</th>
<th>External Trans ID</th>
<th>Payment Method</th>
<th>Name</th>
<th>TPG Reference Number</th>
<th>One Time/Recurring</th>
<th>Payment Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008-03-03 12:47:36.0</td>
<td>1115</td>
<td>402</td>
<td>Visa</td>
<td>Bill Carpothers</td>
<td>200800000000000</td>
<td>One Time</td>
<td>$50.00</td>
</tr>
<tr>
<td>2008-03-03 13:51:57.0</td>
<td>1116</td>
<td>403</td>
<td>Visa</td>
<td>Mary Kay Crockett</td>
<td>20080000000001</td>
<td>One Time</td>
<td>$99.00</td>
</tr>
<tr>
<td>2008-03-03 13:55:34.0</td>
<td>1117</td>
<td>406</td>
<td>Visa</td>
<td>Ward Crockett</td>
<td>20080000000002</td>
<td>One Time</td>
<td>$99.00</td>
</tr>
</tbody>
</table>

[Export To CSV]
How do I, a Store Manager, see my money?

- Account numbers are defined by the Store Manager, and Accounting codes are set up in Marketplace by the Comptroller’s Office.

- On a nightly batch process, the Payment Gateway produces a file of approved credit card transactions that is uploaded to FAMIS on the next business day or very soon thereafter.

- The Store Manager is responsible for reconciling their monthly activity to FAMIS each month.
Credit Card fees will be allocated monthly to the various Marketplace uStore and/or uPay sites.

Setting up a uStore in Marketplace takes about one month lead time for the Comptroller’s Office.

Setting up a uPay site in Marketplace requires coordination with the department’s IT and Comptroller’s Office.
Interested in Marketplace Store?

- How to Request Marketplace Store?

  Contact the Comptroller’s Office to set up a meeting to see if Marketplace will work for you.
Sample Links

- Texas A&M University
- University of Texas at Dallas
- Texas A&M University - Kingsville
- TAMUCC Operation Center
Questions??