

MARKETPLACE USTORE REPORTS

June 26, 2017

1. Report Types

- Sales Reports
 1. By Product
 2. By Stock No.
 3. By Product Type
 4. Totals (entire Store)
- Taxes (Sales Tax)
- Buyer Information (Purchaser/Order Date/Payment Method)
- User Roles

2. Report Access

Only users with the **Accountant Role** can access the reports for your store. To add/delete access, please contact marketplace@winthrop.edu.

Include the Merchant Name, Store Name, User Name (i.e. millerj) and what access you are granting/removing.

Only Store Managers can request changes in user roles. If a Store Manager needs to be changed, the Dean/Department head must email the Marketplace Manager at marketplace@winthrop.edu.

All users are required to have a signed User Agreement on file with the Marketplace Manager.

3. Locating Reports

- Log into the [TouchNet Marketplace application](#).
- Click on your **Marketplace Reports** in the left menu.
- Click on **Stores**.
- Click on the **name of the store** you wish to access for reports.
- Select the **report type** you wish to view.

4. Navigating Reports

Select the Report you wish to view.

Drilling Down

The following reports will let you drill down to get further details

- By Product
- By Stock No.

Date Selection

- Default is the current day. Click on the calendar icon next to each date to change.
- Sales orders are listed by the date the order was submitted by the buyer, NOT by the fulfillment date. If manually fulfilling orders, the order date and fulfillment date can be different.

Exporting

- Exporting from the main report page will export your totals as shown.
- In reports where you can drill down, you can export the data for each product. Modifications to the report can also be made: For example-



Product Detail Report

The default report shows current day information using the default of all application types.

[Back To Store Revenue Report](#)

[Export to CSV](#)

Show columns with a zero dollar price adjustment
 Show payment method details
 Include all modifiers
 Select modifiers to export

From: 03/01/17 12:00 AM  To: 06/26/17 11:59 PM  [View](#)

[Hide Detail](#)

1. You can show/hide products with final order of \$0.
2. You can show/hide payment method details.
3. You can include all modifiers in your report export OR
4. You can specify which modifiers to include (especially if collecting personal information)

[Export to CSV](#)

Show columns with a zero dollar price adjustment
 Show payment method details
 Include all modifiers
 Select modifiers to export

Select modifiers to include in export to CSV

Exclude All

Product Modifiers

Session
 Membership
 Name of West Center Member (Required if registering under the Member Rate)
 Swimmer's Name
 Date of Birth
 Age

5. Reports are exported as a .csv file. This is typically used in Microsoft Excel. Format and Save as desired.

Merchants are responsible for reconciling their store's revenue on a regular basis. If you have a reconciliation concern, please contact [Laura Ramsey](#) or [Heather Savikas](#) in the Cashier's Office. Please cc: marketplace@winthrop.edu in your correspondence as well.

5. Other Reports

Other reports that can be provided by requesting from the Marketplace Manager:

- **Revenue by Accounting Detail Code** (only includes the amounts and payment type)
- **Revenue by Merchant** (this would include a total of all stores within a specific Merchant)

Includes:

1. Merchant Name
2. Number of Items Sold
3. Sales Totals (Merchant Total and/or Store)
4. Shipping Totals (by Merchant and/or Store)
5. Total Item + Shipping Amount (By Store Only)
6. Tax Collected (by Merchant and/or Store)
7. Total (Sales + Shipping + Taxes) (by Merchant and/or Store)

Please remember the following policies when requesting reports from the Marketplace Manager

- Please allow 1-2 business days to receive a response when requesting reports
- Only the store manager or someone with the Accountant role may request reports
- Please be sure to include your Merchant Name, Specific Date range (including time) requested, and if you need Merchant Only or Stores included.
- Email the request to marketplace@winthrop.edu.