## **Marketplace Reports – Quick Guide**

## Generating Marketplace Reports

- 1. Go to https://secure.touchnet.net/central/ to log in to Marketplace.
- 2. Select "Marketplace" under the Applications Menu.

U.Commer	ce Ce	entra	I											
Home Dashboard -	Applicat	tions •	Admini	stration Client Community	Н	elp								
<ul> <li>♥ Marketplace Home</li> <li>▶ System Administration</li> <li>▶ AQH</li> </ul>	Payment Gateway Bill - Payment Business Office Marketplace			• Operations Center Home										
A&H RAW Conference     Accounting     Accounting MS Cohort     ALEKS				ess Mall, Store, Mobile and uPay sites. Search for Order Id or System Tracking Id. Status can be changed on store and upay sites.										
		Mall Link and Search												
► AP Summer Institute		UT Dalla	s Marketpia	ce la						View Mall   V	View Mall   View Mobile			
<ul> <li>Aquatic - Rec Sports</li> <li>Athletics</li> <li>Baseball Camps</li> <li>Basketball - Men's</li> <li>Basketball - Women's</li> <li>BOC</li> <li>Bursar Payments Merchan</li> <li>Bursar Scomm Center</li> </ul>		Order or	System Tra	sking ID :										
		Search Advanced Search												
	t	Stores												
► CAFE		Show 10 • entries												
<ul> <li>Caneer Center</li> <li>➢ Career Center Expos</li> <li>➢ Center Children+Fam</li> </ul>			Name		*	ld 0	Template	0	Туре	0	Merchant Name 0	Web	0	Mobile
<ul> <li>Center for Values</li> <li>Certificate CS</li> <li>Chess Program</li> </ul>			2019 IEEE	International MWSCAS Registration		293	Classic		General		ECS	Enabled		Enabled
<ul> <li>Cleanroom Laboratory</li> <li>Comet Camp</li> </ul>		0	A&H RAW	Graduate Student Conference		146	Classic		General		ABH RAW Conference	Enabled		Enabled
<ul> <li>Comm. Disorders/Aud.</li> <li>Computer Science</li> </ul>		۰	AH College	Prep - Summer		277	Classic		General		ABH	Enabled		Enabled

- 3. Find "Marketplace Reports" on the bottom of the left side of the screen.
  - If you are using a 3<sup>rd</sup> party vendor, the reports will be under the "uPay Sites" dropdown menu.
  - Otherwise, select "Stores" to view the available Marketplace stores.
  - Note: Only Accountants have access to this menu and to pull reports.

Marketplace Reports
Marketplace
Merchants
Stores
uPay Sites
Marketplace Exceptions
Edit My Profile
Help

4. Click on the report that will provide the needed information.

5. The "By Product Report" will provide the most useful information for reconciling cost centers or pulling transaction number and customer information.

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UTD Treasury - Office of Finance
Revenue By Payment Type
By Product
By Stock No.
By Product Type
Totals
Taxes
Buyer Information
Recurring Payment
User Roles

6. Enter the desired date range and click on the "View" button to run the report.

Store Revenue Report
The default report shows current day information using the default of all application types The report is a summar
From: 04/01/19 12:00 AM 🕮 To: 04/30/19 11:59 PM 🕮 Report Type: Product 🔻 View
Application Type:
✓ uStores
✓ uStores Mobile
There are no sales on record for this store for the selected time period.

7. Click on any of the Product Names to only view one product, or check all boxes and click on the "View Multiple Products Detail Report" button to view all.

From	n: 04/01/11 12:00 AM 🕮 To: 04/30/19 11:59 PM 🕮 Report	Type: Product View		
Appl	ication Type:			
<b>1</b>	uStores			
<b></b>	uStores Mobile			
Vie	ew Multiple Product Detail Report			
	Product Name	Quantity Sold	ŝ	▲ <del>▼</del> Sales
	Product Name Welcome to UT Dallas Treasury Services!	Quantity Sold	24	▲ <del>▼</del> Sales
	Product Name Welcome to UT Dallas Treasury Services! AAIM 2018 Registration	Quantity Sold	24 25	▲ <del>▼</del> Sales
	Product Name Welcome to UT Dallas Treasury Services! AAIM 2018 Registration Texas Photonics Center Workshop Registration	Quantity Sold	24 25 93	▲ <del>▼</del> Sales
	Product Name Welcome to UT Dallas Treasury Services! AAIM 2018 Registration Texas Photonics Center Workshop Registration 2018 UTCS Conference	Quantity Sold	24 25 93 25	▲ <del>▼</del> Sales
	Product Name Welcome to UT Dallas Treasury Services! AAIM 2018 Registration Texas Photonics Center Workshop Registration 2018 UTCS Conference Zebrafish Summer Institute	Quantity Sold	24 25 93 25 8	▲ ▼ Sales
	Product Name Welcome to UT Dallas Treasury Services! AAIM 2018 Registration Texas Photonics Center Workshop Registration 2018 UTCS Conference Zebrafish Summer Institute Total:	Quantity Sold	24 25 25 93 25 8 175	A V Sales

8. Select "Export to CSV" to view the report in Excel.

Product Detail Report							
The default report shows current day information using the default of all appl							
Back To Store Revenue Report							
Export to CSV							
Show columns with a zero dollar price adjustment							
Include all modifiers	, where the second seco						
Select mourners to e	export						
From: 04/01/11 12:00 AI	М 🛗 то: 04/30/19 1	1:59 PM					
Application Type:							
✓ uStores							
✓ uStores Mobile							
Hide Detail							
Stock Number	Product Name	order Id					
5763607	Texas Photonics Center Workshop Registration	527210					
Shipping Information							

Please contact <u>FMS-Treasury@utdallas.edu</u> with any questions