

CashNet eMarket Training

November 14, 2016



CI Financial Services Team - Presenter

- **Theresa Olivo**
 - **Staff Accountant**

What is CashNet eMarket?

- It is a service which enables official CI University organizations and auxiliaries to collect revenue online for events, donations, sale of merchandise and/or other special purposes.
- This is not a tool to collect student fees that are owed on a student account.

Types of eMarket sites

- **Storefront:** Allows customers to register and pay for an event/conference or purchase merchandise. This option gathers basic information from the customer.
 - Example
 - https://commerce.cashnet.com/WC_TEST
- **Checkout:** A payment gateway that interfaces with other software. This site will require IT assistance.
 - Examples
 - T2: Parking
 - Island View Orientation
 - StarRez:Housing

How do I request an eMarket?

- CashNet eMarket Request Form
<http://www.csuci.edu/finance/forms.htm>
- Email completed form to cashnet@csuci.edu
- Sites can take 4 weeks to build. Please plan accordingly
- Urgent requests require AVP of Finance approval



Please e-mail completed forms to cashnet@csuci.edu. Forms for new requests should be submitted a minimum of 4 weeks before the website is expected to go live. Requests that interface with other department software may require additional time to complete.

Today's Date: 5/22/13

Action:

Create New Site

Modify An Existing Site

For modifications to an existing site, please allow a minimum of 5 business days from the time the change is submitted.

Requestor Contact Information		
	Primary Contact	Alternate Contact
Contact Name:		
Extension:		
E-mail:		

1. Will the system interface with other systems?
2. What is the purpose of the store?;
3. When does the site (or modification) need to go LIVE on the web?;
4. When will the site be taken down (Leave blank if site will remain up indefinitely)?;
5. Do you have an existing website where you sell items?;
 - No
 - Yes
6. If Yes, URL:
7. Name & phone of person responsible for your department website:
8. Store Help e-mail and phone number: (E-mail will appear as the "From" e-mail on e-mail receipts generated for a completed transaction. Phone number will appear on credit card statements):
9. What disclaimers/agreement information should appear on the site?;



10. What informational text should appear on the receipt?: (ex: Print receipt to receive tickets at the door)

11. What is the refund policy?:

+ 12. List of items to be sold, description, long description, process, chartfield string:

Item Short Descr.	Item Long Description (up to 240 char)	Price	Chartfield String (in this order: BusUnit, Account, Fund, DeptID, Program, Project, Class)	Require shipping (yes/no)	Taxable (yes/no)	Max units sold per one customer	Max units available for sale
EXAMPLE 1: <i>Dodger Tickets</i>	<i>Tickets to Alumni Dodger Game</i>	<i>\$49.99</i>	<i>CICMP, 580090, GD901, 220, 0, 0, 0</i>	<i>yes</i>	<i>yes</i>	<i>1</i>	<i>n/a</i>
EXAMPLE 2: <i>Conference Registration</i>	<i>CFF General Conference Registration</i>	<i>\$199.00</i>	<i>CICMP, 580090, GD901, 220, 00104, 0, 0</i>	<i>no</i>	<i>no</i>	<i>2</i>	<i>250</i>

13. What personal information should be collected?:

Field Description	Type of field	Max Length	Required (needs to be filled in) (yes/no)	Show on Receipt (yes/no)
	<ul style="list-style-type: none"> Alphanumeric drop-down list check box radio button 			
EXAMPLES: <i>Full name</i>	<i>alpha</i>	<i>50 char</i>	<i>yes</i>	<i>yes</i>
<i>Relationship to CSU Channel Islands</i>	Drop down list: <ul style="list-style-type: none"> <i>Faculty/Staff</i> <i>Alumni</i> <i>Friend</i> 	<i>15 char</i>	<i>yes</i>	<i>no</i>
<i>Do you want to be contacted by us?</i>	<i>Radio button</i>		<i>no</i>	<i>no</i>

14. Reporting Information (check all that apply):

First Name: Last Name: Student ID Number:
Address: Phone: E-mail:
Other: (list/describe):

15. Will the department be absorbing the 2.9% convenience fee? If no, the convenience fee will be passed to the customer. Note: Auxiliaries cannot pass the fee on to the customer. Yes No

16. What reports are needed? Please include format (xls, pdf, doc, txt), column heading and frequency (daily, weekly, bi-weekly, monthly):

EXAMPLES OF SITES:

Note: Both sites listed below are test sites that you can visit to see samples of setup

1. Storefront:
 - (a) Conference site:
https://commerce.cashnet.com/AR_CONF_test
 - (b) Recreation fee
https://commerce.cashnet.com/CI_SARC_TEST
2. Checkout:
 - (a) Current sites are not live

For Finance Use Only:

Date Received: _____

Date of Kickoff Meeting: _____

Date Planned for Go-Live _____

Date of Go-Live _____

What are the available payment types?

- Credit cards:
 - Fee of 2.75%
 - MasterCard/Discover/American Express/Visa
- Credit cards fees:
 - Pass to the customer (campus only)
 - Build fee into rate and absorb (auxiliaries)
 - Monthly charge to department

Payment types Continued..

- Invoice: This option must be approved by the AR Accountant prior to implementation.
- ACH: eChecks can only be used where the user is authenticated via myCI prior to reaching an eMarket site. Currently not an option for most eMarket sites.

How do I view information?

- Send an email request to Cashnet@csuci.edu along with your full name, department name and a brief business justification to request access
- Requests are evaluated and completed within 2 business days

What reports are available to me?

- Real time data
- Customize and download
- Automated reports
- Email cashnet@csuci.edu to request public reports

November 10, 2015

Paid Items Report - Daily Paid Item Report for ACIF

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12:48:35 PM

Actual Date 02/01/2015 to 06/30/2015

Printed By: Theresa Hernandez

Tx. No.	Item Code	Bus. Date	Status	Company	Registration Number	Attention	Address	City	State	Zip Code	Phone Number	Email	Amount
Transaction Status : C													
75717	ACIF	02/04/2015	Closed		k5Q2dYwj								225.00
	Registration Number:				k5Q2dYwj								
	First Name:				Dwayne								
	Last Name:				Johnson								
80312	ACIF	04/15/2015	Memo		rwJ5K756								225.00
	Registration Number:				rwJ5K756								
	First Name:				Ellen								
	Last Name:				DeGeneres								
77732	ACIF	03/17/2015	Cancelled		Dv5HbW2P								275.00
	Registration Number:				Dv5HbW2P								
	First Name:				Tom								
	Last Name:				Hanks								

SUB-TOTAL for Transaction Status : X
 GRAND TOTAL

(Count: 4) 1,100.00
 (Count: 88) 22,000.00

SELECTION CRITERIA

Merchant Code: ACIF
 Location: ACIF
 Transaction Status: C|V|O|X|P|N|M
 Source: CR|EM|GW|IMP|IVR|RF|SM|WEB
 Transaction Type: S|A|R|C
 Include Convenience Fees: N
 Include Higher One Fees: N



How will refunds be processed?

- Refunds requests will only be accepted by the primary or secondary contact listed on the CSU Channel Islands eMarket Request form.
- Requests must be emailed to refunds@csuci.edu and include the transaction date, the CASHNet receipt number and the amount of the refund.
- All refund inquires must be directed to SBS at ext 8810 or sbs@csuci.edu

How do I make updates after the site goes live?

- Submit a new CI eMarket request form to cashnet@csuci.edu and indicate it as “revised”
- Only specify the new changes that need to be made

Responsible parties

- eMarket Storefront Owner Responsibilities
 - Submit eMarket request in a timely manner
 - Test storefront
 - Report all changes to cashnet@csuci.edu in advance notice
 - Monthly reconciliation of CASHNet activity to general ledger & report any errors/problems within the same month to cashnet@csuci.edu

Responsible parties

- **Fiscal Services Responsibilities**
 - Create eMarket site as requested
 - Coordinate testing of eMarket site with storefront owner
 - Charge the department for absorbed fees

Resources

- Q&A is available at:
<http://www.csuci.edu/cashnet-emarket/>
- Service Level Agreement (SLA) is available at:
<http://www.csuci.edu/tc/sla/index>
- Contact cashnet@csuci.edu

Questions?

- Primary Contact cashnet@csuci.edu
- General inquiries: Theresa Olivo at ext 8479 or theresa.olivo@csuci.edu
- Refund inquiries: SBS at ext 8810 or sbs@csuci.edu

Thank you!