TouchNet Marketplace User Roles

Departments must establish internal controls that are intended to reduce the risk of an existing or potential control weakness. Departments should consider these roles, along with who will reconcile the Marketplace transactions to Banner Finance, when assigning duties to department staff.

uStore User Roles

STORE MANAGER: *Primary and Backup, but no more than (2). Requires Store Manager Training. View training objectives, training dates, and to register in* MasonLeaps *(please note training requirements).*
Manage general store settings
- Bring stores online and take stores offline (and schedule status changes)
- Configure email messages
- Configure stores to run in single store Mode
- Upload splash and side banner images, and for stores in single store mode, upload header images
- Configure shipping classes and Rates
- Configure store product categories
- Add and edit products
- Schedule status changes for Products
- Move products between categories
- Configure payment methods that are allowed with user groups
- Configure user modifiers
- Activate the Marketplace tax service and configure which states use this service
- Grant the store clerk, fulfiller with refund/cancel rights, and fulfiller user roles to other users
- View Marketplace financial reports for the store

STORE ACCOUNTANT: *Can have up to (3-4) in this role to pull registrations, finance reports.*
Primary name in this role responsible for reconciling the activity in the store monthly.
- View Marketplace financial reports for the store

STORE CLERK
- Add and edit products in their assigned store and move products among categories

FULFILLER
- Fulfill orders

FULFILLER WITH REFUND/CANCEL RIGHTS: *Primary and Backup, but no more than (2).*
- Fulfill orders
- Refund orders
- Cancel orders

POINT OF SALE (POS) ATTENDANT: *Requires POS training. Can have up to (4).*
Accept in-person credit card transactions

UPay User Roles

UPAY SITE MANAGER: *Primary and Backup, but no more than (2)***.**
- Manage the allowed payment methods
- Configure the site to accept recurring payments
- Configure site links and URLs
- Configure e-mail announcement text
- Configure uPay page titles and descriptive text
- Configure additional donation offerings
- Upload header, side banner, and footer images
- Take uPay sites online or offline
- Search for payments
- Cancel/refund payments
- Review Marketplace financial reports for the uPay site

UPAY ACCOUNTANT: *Can have up to (3-4) in this role to pull registrations, finance reports. Primary name in this role responsible for reconciling the activity in the uPay monthly.*
- View Marketplace financial reports for the uPay site.

PAYMENT CLERK: *Primary and Backup, but no more than (2).*
- Search for payments
- Cancel/refund payments

Additional information about the TouchNet Mason Marketplace is available at https://fiscal.gmu.edu/mason-marketplace/mason-units/*. Specific inquiries may be sent to* commerce@gmu.edu*.*