Marketplace

Merchant Guide
Practice Enterprise Marketplace

Contents

1. Connect to the Marketplace

To connect to the Marketplace, go to https://marketplace.penworldwide.org
You will be asked to enter your username and password that is supplied by your National Office.

You can also use the connection method set up by your National Office. The login method is different by country. For those using the Web Application, you can click the direct link to login to the Marketplace:
https://penapps.penworldwide.org

PENApps Marketplace

For Practice Enterprises using the PEN Worldwide Bank, you can connect
directly using the Marketplace Login widget located on the portal of the Bank:

PEN Marketplace

For Practice Enterprises using a national Login Service, you can click the
widget directly from your National Portal or you can access the Marketplace from the Widget in the PEN Worldwide Login system at https://marketplace.penworldwide.org.

Click the Widget corresponding to your National Network:

Log In Using a National Service.

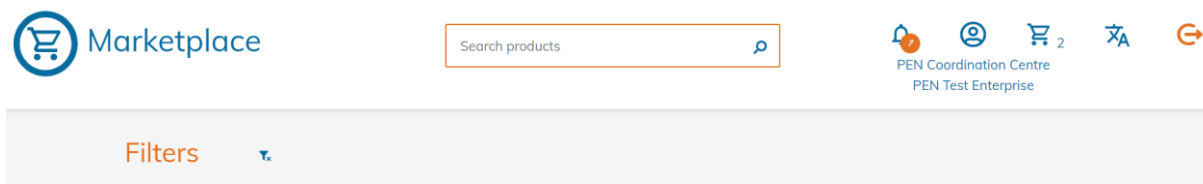|		
Austria ACT	Belgium Cofep	Bulgaria BUCT
Canada CPEN-RCEE	Chile CSCE	Colombia CO
Denmark Simu	Indonesia VCI	Ivory Coast RIEE
Kosovo QKFU-KPFC	Luxembourg CLEE	Madagascar RMEE
Montenegro CSO	Netherlands PENNED	Palestine ANPSim
Slovenia CUPS	South Korea KoreaPEN	Spain SEFED
Switzerland Helvartis	Tunisia REET	USA VEI

2. Modify your Language in the Marketplace

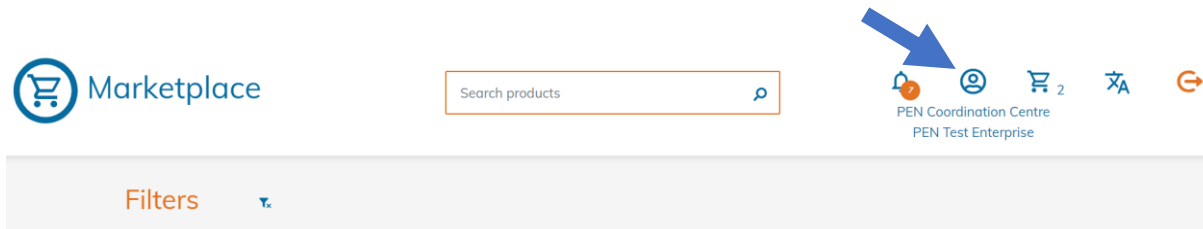a) Click on the icon on the top-right above your name to access your Enterprise Area

b) Select the language from the list.

The languages that appear are the languages available in your country. The entire website is translated; however, products may only be available in the native language in which they were created.

○ Deutsch
○ español
○ Nederlands
○ svenska
○ français
○ slovenščina
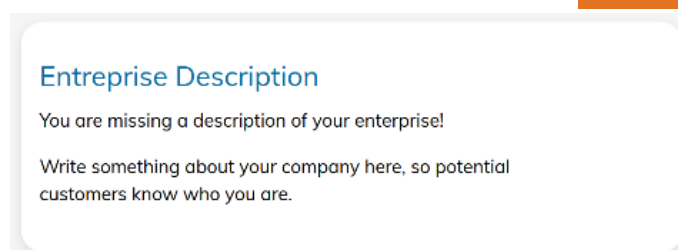◉ English
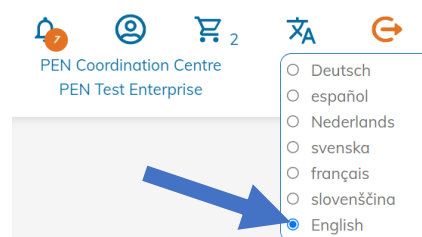
3. Access your Enterprise Management Area

Click on the icon on the top-right above your name to access your Enterprise Management Area.

4. Enter a Description of your Enterprise Activity

Other Practice Enterprises need to know what you sell, so it's important to enter an activity description. We suggest that you enter the description in English **and** in your national language.

a) Click on the Gear icon on the bottom left of your Enterprise Management Area:

b) Enter your text in the top section in « Description ». Keep your text short and direct and use keywords.

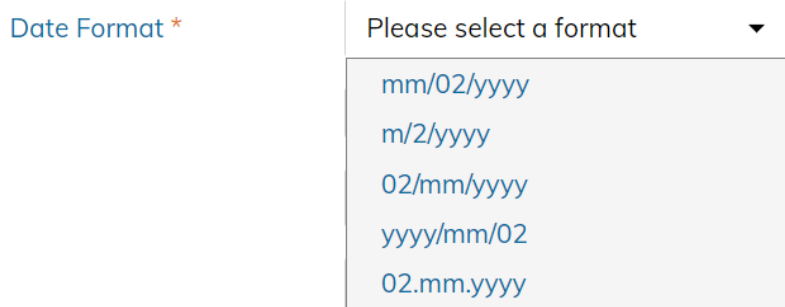**Entreprise Description**

You are missing a description of your enterprise!

Write something about your company here, so potential customers know who you are.

5. Set the Currency for your Enterprise

    a) Continue in the Settings page on the bottom left of your Enterprise Management Area.

    b) Verify the Currency for your Enterprise and change if necessary:

Currency *   EUR

                        EGP

Date Format *   Please select a for   EUR

                        FID

6. Set the Date Format

    a) Continue in the Settings page on the bottom left of your Enterprise Management Area.

    b) There are 5 options for the Date Format, depending on your country and language. Choose the format that you prefer for your Enterprise:

Date Format *   Please select a format

                         mm/02/yyyy

                         m/2/yyyy

                         02/mm/yyyy

                         yyyy/mm/02

                         02.mm.yyyy

7. Copying your Enterprise Link

An Enterprise Link is a URL (web address) that you can copy and paste into your Marketing documents. It is a direct link to the Marketplace featuring all the products from your Enterprise. You can use it to link your customers directly to your products.

Enterprise Link*

https://marketplace-dev.penworldwid

Simply click on the   symbol to copy the URL to your Enterprise Page.

8. Adding your Payment Terms

Your **payment terms** must therefore be determined before starting to sell your products.

Click on « **Payment Terms** » and enter the delay offered to your customers (in days) to make a payment for their purchase.

Payment terms *   30   Days

9. Adding your Delivery Terms

Your **delivery terms** are important for your customers. They must therefore be determined before starting to sell your products.

Here you can enter the following terms:

1 Delivery terms *   30   Days

2 Freight *   Fixed Delivery Fee   ⬍
                            Free delivery
3 Fixed delivery fee *   Carriage Forward   EUR
                            Fixed Delivery Fee   Excl VAT

4 Free Delivery if net purchase above *   150   ⬍   EUR
                                                           Excl VAT

1. Delivery Terms
    The time it will take your Enterprise to deliver (in days) the purchase made by a customer.
2. Freight
    a. « Free Delivery » - delivery fees are included in the product price
    b. « Carriage forward » - delivery fees due at reception
        You have to the option to include Free Delivery if the purchase is above a certain value.
        i.   Select Carriage Forward
        ii.   Enter the value for a customer to get free delivery

Freight *   Carriage Forward   ⬍

Free Delivery if net purchase above *   150   ⬍   EUR
                                                     Excl VAT

    c. « Fixed delivery fee » - a pre-determined fee decided by you for all products
        This is a fixed delivery fee for any product no matter the dimensions or weight.
        You have to the option to include Free Delivery if the purchase is above a certain value.
        A. Select Fixed Delivery Fee
        B. Enter the value of the fixed delivery cost
        C. Enter the value for a customer to get free delivery

Freight *   **A**   Fixed Delivery Fee   ⬍

Fixed delivery fee *   **B**   10   ⬍   EUR
                                            Excl VAT

Free Delivery if net purchase above *   **C**   150   ⬍   EUR
                                                             Excl VAT

3. Verify the Delivery Terms as well as all other Settings and click Save:

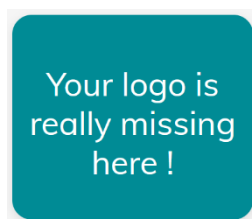|	
Currency *	EUR
Date Format *	02/mm/yyyy
Company Link *	https://marketplace-dev.penworldwid
Payment terms *	30 Days
Delivery terms *	7 Days
Freight *	Carriage Forward
Free Delivery if net purchase above *	100 EUR Excl VAT

Save

10. Adding your Logo

To ensure the best viewing experience the image size must be at least 300pixels tall or wide.

Continue to the top right tile of your Enterprise Management Area.

Click on
« **Your logo is missing here** »

Your logo is
really missing
here !

Then click « **Select file** » to select
the image file for your logo

Click button to
upload a file

Select file

To ensure the best viewing experience
the image size must be at least
300pixels tall or wide.
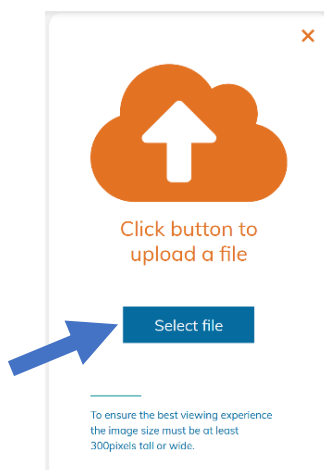
Click on « **I like it** » to
save the logo

Practice Enterprise Network
PEN WORLDWIDE

I like it!

No, I'll select a
new one

Your Enterprise setup is now complete.

The next step is to start adding products and services for sale for your Enterprise.

D. **Product Categories***: Products can be linked to one or more Yellow Pages Categories.
These are the Categories used to identify your products to your customers when they filter by Category. You should select all Categories that accurately match your product.
<u>DO NOT</u> select all Categories. This will minimise the impact of your products in the Marketplace.

Click on the Dropdown selector: Product Categories *

selected (0) ▼

Check the box for every Category you want your product to appear in.

You can select more than one Category.

Use the Search bar to search for a Category:

it

■ **IT and electronics**
☐ Publicity, marketing and media
☐ Business services, public/private utilities

☐ Cars and vehicles
☐ Clothing and apparel
☐ Real estate, home and garden
☐ Recreation, arts and entertainment
☐ Food and beverages
☐ Sports and events, gaming and hobbies
☐ Health and personal well being
☑ Office equipment and supplies
☑ **IT and electronics**
☐ Publicity, marketing and media
☐ Transportation, logistics and storage
☐ Business services, public/private utilities
☐ Technical and industrial services and materials
☐ Travel and tourism
☐ Not listed

E. **Description***: Enter a clear, short description of the product. We suggest to make it bilingual English/national language to help customers find your product when searching.

F. **Picture***:
   1. Click the link to enter one or more images for your product
   2. Click Select File to choose and upload an image.
      The image size must be at least 300 pixels tall or wide.
   3. Click ''I like it!'' to accept the image.
   4. You can now Click to add another image or delete the previous image:

1) Click to delete the image
2) Click to add another image.
   You can add up to three images.

G. Click Continue

Step 2: Create new or choose custom options – optional

In this step you can add different options for a product. Example if you sell shoes, you can have options for sizes and/or for colours, or if you sell vacations, you can have options for different dates.

a) If you have already created an options list, you can enter the Option Name directly:

Create new or choose custom options - optional

Option 1	Sizes

b) Add an Option: If you have not created any options lists, click to Add an Option. Custom options can be colours, materials, sizes, week numbers, etc. Name your list in a way that it is easy to recognise. Your lists can be reused for multiple products. +Add Option

c) Add the Option Group.

Add option group

Internal name *	**1**	ⓘ
Display name *	**2**	ⓘ
Option Name *	**3**	
Option Name *	**4**	

+Add option   +Add 5 options

5 Save

1) Enter the Internal name for the Option. This is the Name that is visible only to your company, in the custom options list and when adding a custom option to a product.

2) Enter the Display name. This is the Name the customer will see when viewing your product.

3) Enter the option name(s). You can enter as many option names as you want.
Example Blue, Yellow, Red, Orange, or sizes for shoes example 38, 40, 42, 44, 46.

4) Click +Add Option to add one additional option or +Add 5 options to add 5 options.

5) Click Save.

Now you can enter the new Option Name in Option 1. The Option Group appears with all the Options included in that Option Group. You can keep all selections or remove some options:

Create new or choose custom options - optional

Option 1	Colour	ⓘ

+Add Option
☑ Blue
☑ Green

Step 3: Product Price and Display Period

Price: Enter the Price of one product.

Unit price: Every product is sold at the same price

Interval price: Different prices depending on the number on products bought. Example a lower price per product if you buy more.

If you offer a fixed price no matter the quantity, enter it as per the example below:

If you want to offer different prices according to the number of articles purchased, click on « **Interval** » to create pricing intervals.

The example below displays 4 different levels of interval, with a different price per unit depending on the number of units purchased:

Display Period: The Number of days your product will be visible in the Marketplace before you must reset the Display Period.

Products can be displayed for a maximum of 4 weeks before needing reactivation. This is to ensure that Enterprises remain active and that products are actively available inside the Marketplace.

If you want to keep the standard maximum display period, do not make any changes to the calendar.

Click the dates only if you want to open the calendar and select a custom display period. Here you can manually select a group of dates anywhere up to four weeks:
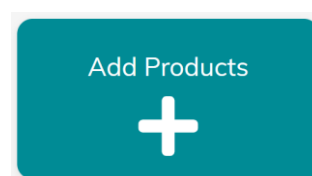
End of Adding a Product – if you are happy with your product, click **Save**.

Click on « Add products » again to add an additional product(s):

12. Creating a Sales Campaign

Products/services can be put on sale by creating a Sales Campaign. You can create one or more Sales Campaigns that run at the same time, or you can programme a Campaign to start at a future date. From the Enterprise Management, click the tile for Sales Campaigns:

Click ➕ to start creating a new Sales Campaign.

Create Sales Campaign

1) Campaign Name
   Enter a name for the Sales Campaign. This name is for internal management and is visible only to your enterprise in the Sales Campaign list. It is not visible for your customers.
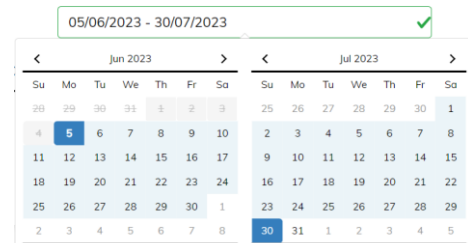
2) **Display Period**

The Days your Sales Campaign will be active in the Marketplace before the products/services return to regular price.

Click the dates to open the calendar and select a custom Campaign period. Here you can manually select a group of dates.

Sales Campaigns can be set for any number of days. Example, you can make a campaign that lasts 1 week or a campaign that lasts 3 months.

Example here is an 8-week Campaign:

3) **Add Product/Service**

Click the ⊕ to add a product/service to your Sales Campaign.

Here you can select a Product/Service from a dropdown list to add it to your campaign.

a) Select a product from the dropdown list

b) Enter the Discount in % for that product

c) Click **Continue**

d) Click the ⊕ to add each additional product/service to your Sales Campaign

4) **Click Save**

13. Managing and Editing Products
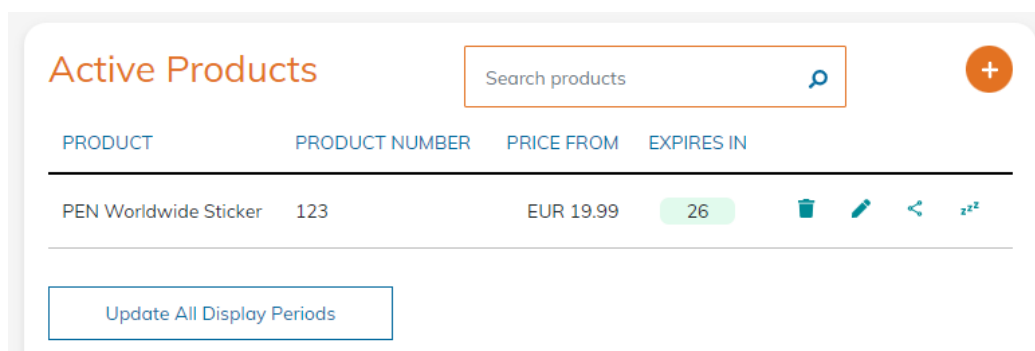
To modify / update your products, change the display period, etc. ...

Click on « **Manage Products** »

The number corresponds to the number of products you manage.

Manage Products *

5

Active Products

PRODUCT	PRODUCT NUMBER	PRICE FROM	EXPIRES IN				
PEN Worldwide Sticker	123	EUR 19.99	26	🗑	✏	❮	zᶻ

Update All Display Periods

Update All Display Periods	**Update All Display Periods** allows you to modify «all at once» the display period of all your products in the Marketplace.

Here are the descriptions of the different options for managing and editing products:

EXPIRES IN 28	**Expires in** indicates the number of days remaining in the current display period for your product to be visible in the Marketplace

Trash allows you to delete a product

Pencil allows you to modify a product

URL Link allows you to copy a direct URL link to your product (this allows you to use the link in an advertisement or a marketing campaign)

Hide Product (product will not appear in Marketplace until unhidden)

Unhide Product (product will once again be visible in the Marketplace)

Add Product allows you to click and go to the Add Product Modal

Expired Products are products that have surpassed the number of days in the display period and are no longer visible in the Marketplace. They are not visible to customers and cannot be purchased.

Expired Products

| Search products				🔍
PRODUCT	**PRODUCT NUMBER**	**PRICE FROM**	**EXPIRES IN**	
PEN Worldwide Lanyard White	PEN-25	EUR 1.75		🗑 ✏ ⇱ z^z

Update All Display Periods

To **update the display period for all products,** click on the button:
Click on the button to "Update All": | Update All Display Periods |

You are about to Update All Expired Products

If you update, all expired products will get the new selected display period.
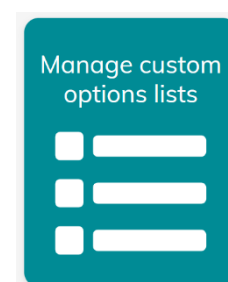
NO - don't update

I'm sure, update all
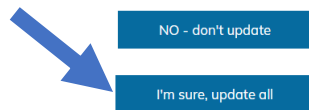
To update the display period for only one product, click the pencil icon:

14. Manage Custom Options Lists

This section is used to manage and create custom options lists for your products. These options are used when adding a new product or modifying an existing product. You can create any number of custom options lists.

Inside the Options List, you see the current Custom Options. Options that are currently in-use for one or more products are checked:

Manage custom options lists

IN USE

Custom options

IN USE	INTERNAL NAME	DISPLAY NAME		
✓	Colour	Colour	🗑	✏
	Sizes	Sizes	🗑	✏

You can add, edit or delete Custom Options from this section.

15. Adding PDF Product Catalogues

Catalogues are available for downloading from other Enterprises in your Enterprise description.
Note: catalogue items are not visible as items in the Marketplace unless they are added to your product list.

1. Click on « **Catalogues** »

Catalogues
No catalogues uploaded - upload now
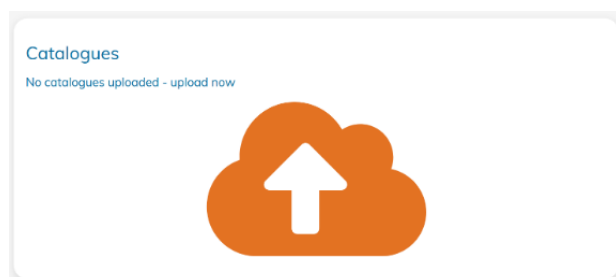
2. Click on « **Select file** » to select the file to publish

Click button to upload a file

Select file
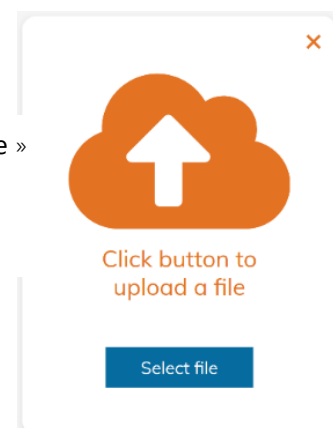
Upload Catalogue

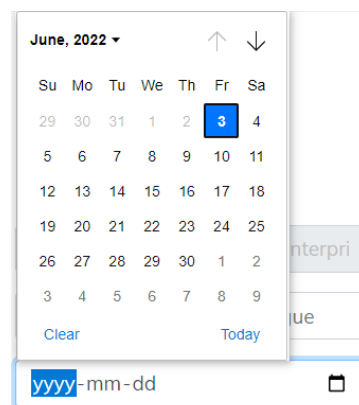|	
File	First Steps for the Practice Enterpri
Display name *	Fill in a name for the catalogue
Expiry date *	yyyy-mm-dd 📅

Save

3. Enter the Display Name (the catalogue name visible in the Marketplace)

Fill in a name for the catalogue

4. Enter the expiry date for the catalogue
(the date when the catalogue will no longer be visible -
important so catalogues stay up-to-date)

June, 2022 ▾

Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	**3**	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

Clear   Today

5. Click Save

yyyy-mm-dd 📅

16. Managing PDF Product Catalogues

Uploaded catalogues can be downloaded, edited or deleted:

View Catalogues ➕

Active catalogues

NAME	UPLOADED	EXPIRY			
PEN Worldwide Fact Sheet 2020 General - Print FR SM	3/10/2022	5/2/2024	⊕	✏️	🗑️
First Steps for the Practice Enterprise Marketplace	3/2/2022	5/2/2024	⊕	✏️	🗑️

⊕   Click to Download the catalogue

✏️   Click to edit the catalogue display name and/or expiry date

🗑️   Delete the catalogue from your library

17. Manage Custom Options Lists

This section is used to manage and create custom options lists for your products. These options are used when adding a new product or modifying an existing product. You can create any number of custom options lists.

Inside the Options List, you see the current Custom Options. Options that are currently in-use for one or more products are checked:
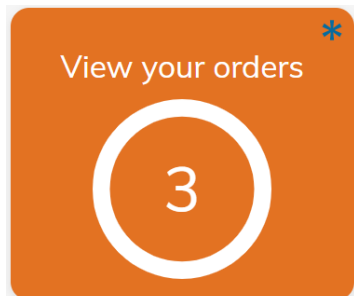
IN USE

✓

You can add, edit or delete Custom Options from this section.

Custom options

IN USE	INTERNAL NAME	DISPLAY NAME		
✓	Colour	Colour	🗑	✏
	Sizes	Sizes	🗑	✏

18.Merchant Order Management

Click on the « **View your Orders** » tile in the Enterprise Management Page to view and manage your Merchant Sales Orders.

Note that the number in the circle corresponds to the current number of **New Sales Orders** (in this example 3).

The asterisk (*) at the top right of the modal is another indication that you have New Sales Orders.

Here is an example of a sales order listing:

A. Merchant / Customer toggle switch

Merchant ⬤ **Customer**

This toggle switch is used to switch the view between orders for your Enterprise as a Merchant (sales orders) and as a Customer (purchase orders). Customer orders are managed in a similar way but detailed in the Marketplace Customer Guide.

B. New Sales Orders

New Sales Orders (1)

Customer	Order No.	Date		
ALL AND MORE	25770	4/22/2022	👁	✏

Incoming Sales Orders are listed at the top of the Order List.
The Customer name (Enterprise name), the Order Number and the date of the order are listed.

C. Sales Orders in Progress

Sales Orders in Progress (1)

Customer	Order No.	Date		
ALL COLOURS Esbjerg	25649	4/19/2022	👁	✏

Sales Orders in Progress are listed second on the Order List. In Progress means the order has been received and is in the process of being processed, shipped and paid.

D. Completed Sales Orders

Completed Sales Orders (1)

Customer	Order No.	Date		
Inframe	25328	3/31/2022	👁	✏

Completed Sales Orders are listed third in the Order List. These sales orders have been fully processed (shipping is complete and the customer has issued a full payment).

E. Cancelled Sales Orders

Cancelled Sales Orders (7)

Customer	Order No.	Date		
CHEERIO SPIRIT GmbH	24742	3/8/2022	👁	✏
ALL AND MORE	24675	3/4/2022	👁	✏

Cancelled Sales Orders are listed near the bottom of the Order List. The sales order has been cancelled by the Merchant. The Customer is automatically informed of a cancelled order from the merchant. Future functionality will allow to cancel an order as a Customer.

F. Cancellations Requested by Customer
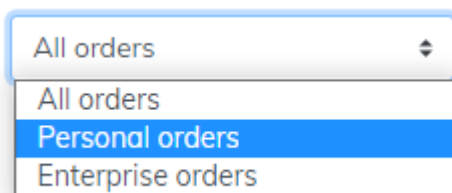
Cancellations requested by customer
There are no orders.

CUSTOMER	ORDER NO.	DATE

Cancellations Requested by Customer are listed at the bottom of the Order List. The sales order has been requested to be cancelled by the Customer. The Customer is automatically informed of a cancelled order from the merchant.

G. Filter by Personal or Enterprise Order

When a Customer places an Order they select whether the Order is for themselves (a Personal Order payable from their personal account) or for their Enterprise (an Enterprise Order payable by the Enterprise). You can filter all Sales Orders by the type of Order:

All orders

All orders
Personal orders
Enterprise orders

Click Personal Orders to see only incoming Orders made by a Trainee and payable from a Personal account.

Click Enterprise Orders to see only incoming Orders made by an Enterprise and payable from an Enterprise account.

H. View Order

Click the View icon to open the order details.

The Order Details will now open, allowing you to view all details about the order.
The products, images, delivery costs, terms and status are all detailed in the order.

Order number: 25770

Archive Order

Customer

Enterprise Name	ALL AND MORE	Date	4/22/2022
Contact	Segreteria	Order no.	25770
Contact Email	allandmore@simulimpresa.com	Customer Type	Enterprise
Address	VIA PERUGIA, 1	Payment terms days	30
City/Region	SAN DONA´ DI PIAVE (VE)	Delivery terms days	30
Post Code	30027	Status	New
Country	IT		

	Product	Item no.	Unit count.	Quantity	Price
	PEN Worldwide Lanyard White	PEN-25	1	9	EUR 18.00
	PEN Worldwide Lanyard Blue	PEN-30	1	9	EUR 18.00
	PEN Worldwide Agenda	PEN-15	1	18	EUR 180.00
Subtotal (3) products					EUR 216.00
Fixed delivery fee					EUR 0.00
Total					EUR 216.00

You have three options within the Order:

PDF   Archive Order

Click the button to Download a PDF of your Order
Here is a view of a downloaded PDF of an Order:

Archive Order Click to send the Order to the Archive.
The Order can be accessed from the Archives

Click the button to edit the Order State.
See the next section for information on Order States.

Order number: 539

I. Edit the State of an Order

Click Edit icon to change the State of the Order.

You now have three options for changing the state of the order:

1. In Progress: The sales order has been received and is in the process of being processed, shipped and paid.

2. Finished: The sales order has been fully processed (shipping is complete and the customer has issued a full payment).

3. Cancelled: The sales order has been cancelled by the Merchant. Future functionality will allow to cancel an order as a Customer.

J. View More

At anytime, you can click the **>> View more** button at the bottom of the Order List to expand the selection and view additional orders from lower down in the List.

19. Searching and Viewing Orders

Click the **>> View more** button at the bottom of the Order List for any type of order to open the Historical Orders listings.

Completed Sales Orders (12)
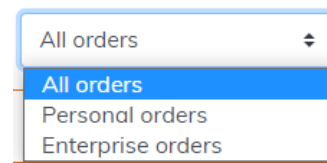
CUSTOMER	ORDER NO.	DATE		
ACTIV EURE SARL	539	12/6/2021	👁	✏
ACTIV EURE SARL	549	7/7/2022	👁	✏
ACTIV EURE SARL	550	7/7/2022	👁	✏

1. Personal or Enterprise Order

Click Personal Orders to see only incoming Orders made by a Trainee and payable from a Personal account.

Click Enterprise Orders to see only incoming Orders made by an Enterprise and payable from an Enterprise account.

2. Search Orders

Use the Search field to search for any current or historical Orders, depending on your search criteria.

You can search for a name, number or any other search criteria. The results will display below (example search for ''48'')

3. Search by Period

Here you can select for which period you want to search for an Order.
You can search for Orders from the Past 30 Days, Past 3 Months, Past Years, or Archived Orders.
Simply select the period for which you want to View Orders:

Example: A search for Orders from 2021, with the search for ''5'', gets the following results:

![Archived orders dropdown list showing: The past 30 days, Past 3 months, 2022, 2021, 2020, 2019, Archived orders]

Archived Orders: You can also search for Orders that have been Archived by selecting the option from the Period List:

Orders are Archived from the Edit Order page. Orders stay in the Archive until deleted.

20.   Notifications for New Orders and/or Expired Products

A Notification Icon is located in the header of the Marketplace to indicate the following:

1.   New Orders that have not been processed
     and/or
2.   Expired Products that need to be renewed.

Clicking the Icon takes you to the Enterprise Management page where you can click on manage Products for any Expired Products or on View your Orders to view and New Orders.

1 Expired Products
1 New Orders
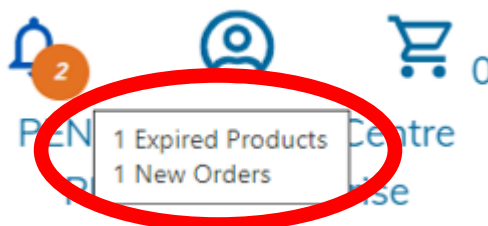
21.Go Back to the Homepage

Click on the « **Marketplace** » logo at the top-left at anytime to exit the Enterprise Management and go back to the homepage

22. Logout of the Marketplace

Click the Logout link at the top-right at anytime to fully Logout of the Marketplace. You will be taken to the Login Page or another page determined by your National Office.