



## Merchant Guide

### Practice Enterprise Marketplace

#### Contents

1.	Connect to the Marketplace.....	2
2.	Modify your Language in the Marketplace.....	3
3.	Access your Enterprise Management Area.....	3
4.	Set the Currency for your Enterprise .....	3
5.	Enter a Description of your Enterprise Activity .....	3
6.	Adding your Logo .....	4
7.	Adding your Sales Terms and Conditions.....	4
8.	Adding Products or Services .....	6
9.	Managing and Editing Products.....	10
10.	Adding PDF Product Catalogues .....	11
11.	Managing PDF Product Catalogues.....	12
12.	Manage Custom Options Lists.....	12
13.	Merchant Order Management .....	13
14.	Notifications for New Orders and/or Expired Products .....	16
15.	Go Back to the Homepage .....	16
16.	Logout of the Marketplace .....	16



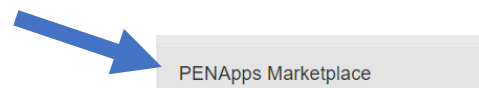
## 1. Connect to the Marketplace

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>



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



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.

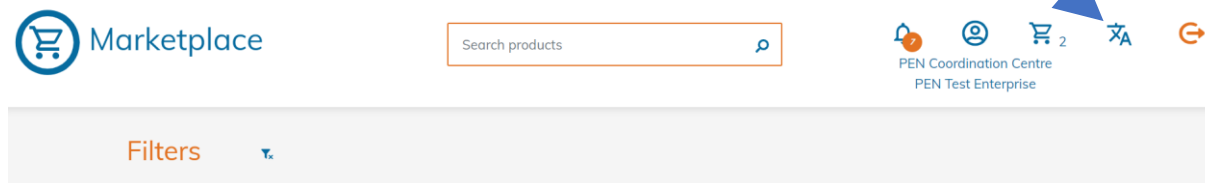


Bulgaria BUCT	Canada CPEN-RCEE	Chile CSCE
Cofep	Colombia CO	Denmark Simu
Indonesia VCI	Kosovo QKFU-KPFC	Luxembourg CLEE
Montenegro CSO	Netherlands PENED	Palestine ANPSim
Slovenia CUPS	South Korea KoreaPEN	Switzerland Helvartis
USA VEI	Worldwide Hosted PEs	



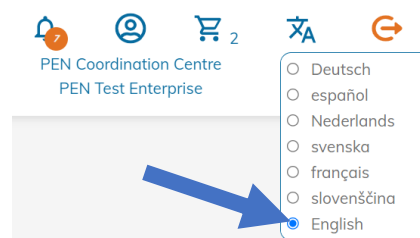
## 2. Modify your Language in the Marketplace

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



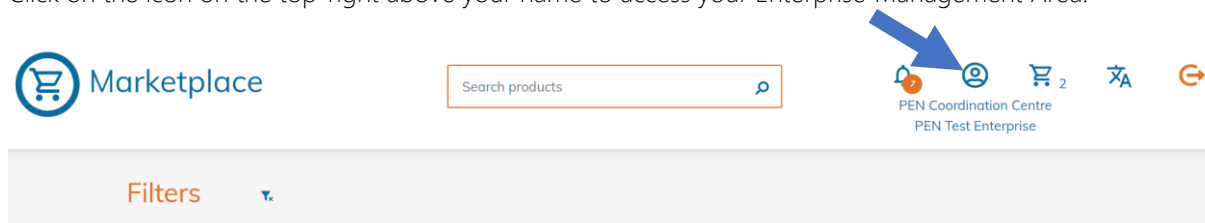
- b) Select the language from the list.

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.



## 3. Access your Enterprise Management Area

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



## 4. Set the Currency for your Enterprise

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



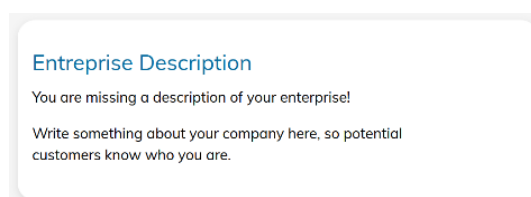
- b) Verify the Currency for your Enterprise and change if necessary:



## 5. 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 « Enterprise Description »





- b) Then enter a description and click on « **Save** »

**Enterprise Description**

**B I**

We sell computers, servers, and electronic devices.  
*Nous vendons des ordinateurs, serveurs et appareils électroniques.*

We create also software and websites.  
*Nous créons également des logiciels et des sites Web.*

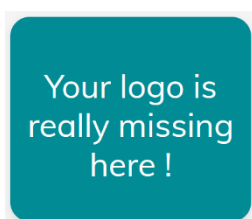
**Save**

## 6. Adding your Logo

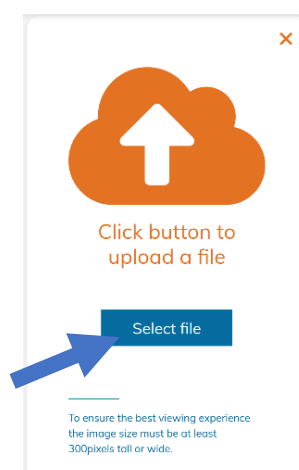
An enterprise visual identity will stand out better with a logo.

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

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



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



Click on « **I like it** » to save the logo



## 7. Adding your Sales Terms and Conditions

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

Click on « **Terms** »

**Terms**

You haven't set terms yet.

[Click on this tile to set terms.](#)



Here you can enter the following terms:

## Terms

1	Payment terms *	<input type="text" value="30"/>	Days
2	Delivery terms *	<input type="text" value="30"/>	Days
3	Freight *	<div>Fixed Delivery Fee</div>	
4	Fixed delivery fee *	<div>Free delivery</div> <div>Carriage Forward</div> <div>Fixed Delivery Fee</div>	EUR Excl VAT
5	Free Delivery if net purchase above *	<input type="text" value="150"/>	EUR Excl VAT

1. **Payment Terms**

The delay offered to your customers (in days) to make a payment for their purchase.

2. **Delivery Terms**

The time it will take your Enterprise to deliver (in days) the purchase made by a customer.

3. **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.

i. Select Fixed Delivery Fee

ii. Enter the value of the fixed delivery cost

iii. Enter the value for a customer to get free delivery

Freight \*

i.

Fixed Delivery Fee

Fixed delivery fee \*

ii.

10

EUR  
Excl VAT

Free Delivery if net purchase above \*

iii.

150

EUR  
Excl VAT



4. Verify the Terms and click Save:

## Terms

Payment terms *	<input type="text" value="30"/>	Days
Delivery terms *	<input type="text" value="30"/>	Days
Freight *	<input type="text" value="Fixed Delivery Fee"/>	
Fixed delivery fee *	<input type="text" value="10"/>	EUR Excl VAT
Free Delivery if net purchase above *	<input type="text" value="150"/>	EUR Excl VAT

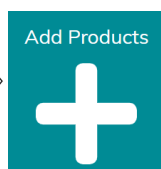


Save

## 8. Adding Products or Services

You can now add your products or services

Click on « Add products »



Products are entered in the Marketplace in three steps:

Step 1: Product Information

Step 2: Custom Options

Step 3: Pricing and Display

**Step 1:** Adding the base Product Information ( \*means a mandatory field )

### Add product

Step 1  
Product Info

Step 2  
Custom Options

Step 3  
Pricing & Display

Product no. *	<input type="text"/>	<div>No product picture yet! Click to add</div>
Product name *	<input type="text"/>	
Unit count *	<input type="text" value="1"/>	
Description *	<div><div>B I</div><div><div></div></div></div>	

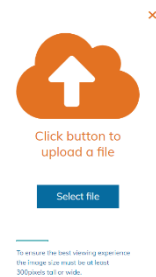
Continue



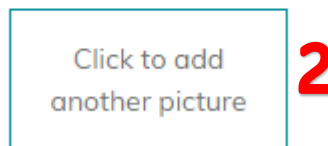
- a) Product Number\*: Enter the product reference number
- b) Product Name\*: Enter the Product Name. Names can be in English and/or national language. Be aware! Customers will search for your products by name. Ensure they are able to find your product in the Marketplace. We suggest using at least one English word to describe the product.
- c) Unit Count\*: Select the number of products you sell in one package. If you sell your products in packages of 10 and your customer buys 1 package, they get 10 products. If you sell your products in sets of 2, you must put it in the product name or description. In that case they get 10 products in sets of 2.
- d) 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.

e) Picture\*:

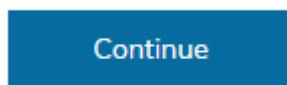
- 1. Click the link to enter one or more images for your product
- 2. Click Select File to choose and upload an image.  
To ensure the best viewing experience the image size must be at least 300pixels tall or wide.
- 3. Click "I like it!" to accept the image.
- 4. You can now Click to add another image or delete the previous image:



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



f) 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

- 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.
- 6) 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

## 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:

### Pricing and display

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:





## Pricing and display

Product price \*



Unit ☒ Interval \*

1	-	10	24.99	EUR	
11	-	50	22.99	EUR	
51	-	100	20.99	EUR	
101	-	...	19.99	EUR	

+ Add interval

**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:

Display Period \* 06/03/2022 - 06/30/2022

Back

< Jun 2022 >

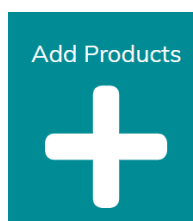
Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

< Jul 2022 >

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	1	2

**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):





## 9. Managing and Editing Products

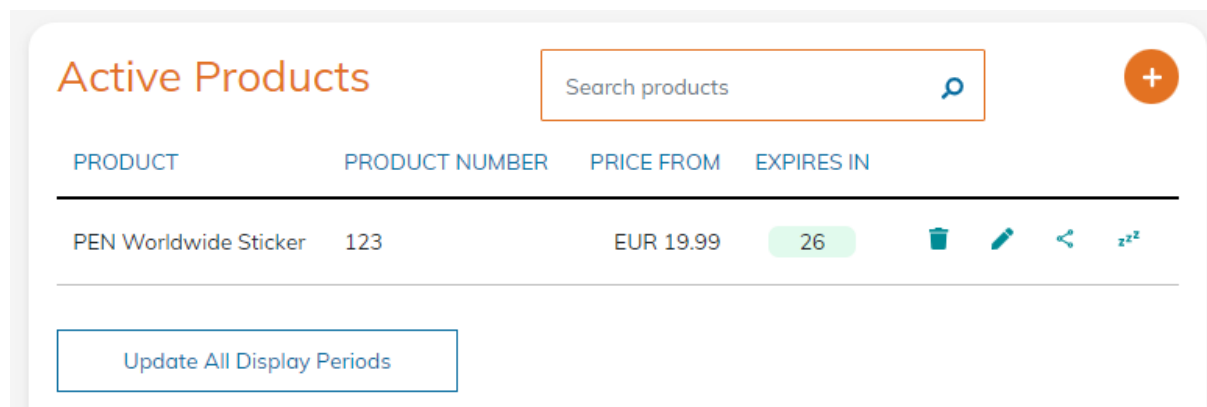
To modify / update your products, change the display period, etc. ...

Click on « **Manage Products** »

Manage Products \*

The number corresponds to the number of products you manage.

5



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

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.



## Expired Products

Search products



PRODUCT	PRODUCT NUMBER	PRICE FROM	EXPIRES IN
PEN Worldwide Lanyard White	PEN-25	EUR 1.75	

Update All Display Periods

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.

To update the display period for all products, click on the button:

Update All Display Periods

Click on the button to "Update All":



### 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

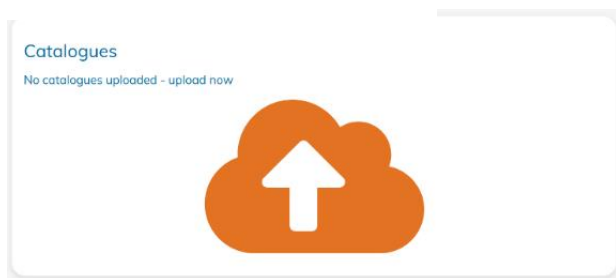
To update the display period for only one product, click the pencil icon:

## 10. Adding PDF Product Catalogues

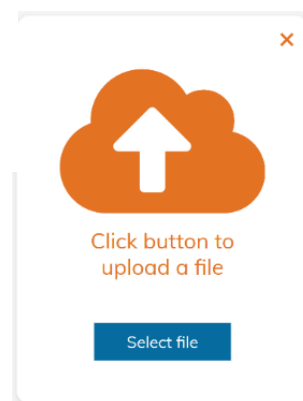
Catalogues are available for downloading from other Enterprises in your Enterprise description.

Note: catalogue items are not visible as items in the Marketplace unless they are added to your product list.

1. Click on « Catalogues »



2. Click on « Select file » to select the file to publish



### Upload Catalogue

File

Display name \*

Expiry date \*

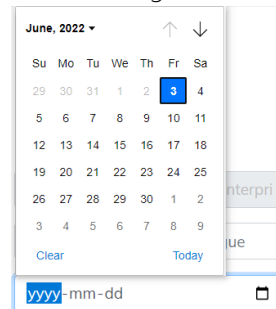


3. Enter the Display Name (the catalogue name visible in the Marketplace)

Display name \*

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)



## 11. 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



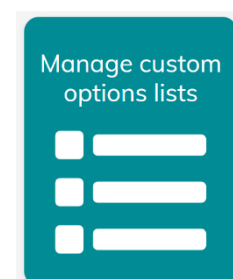
Delete the catalogue from your library

## 12. 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



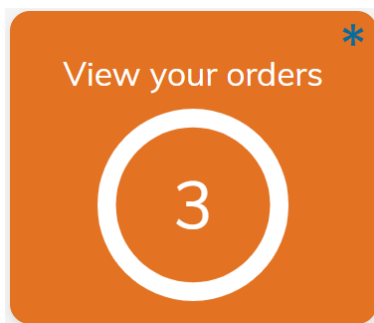


Custom options			+
IN USE	INTERNAL NAME	DISPLAY NAME	
✓	Colour	Colour	
	Sizes	Sizes	

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

## 13. Merchant Order Management

Click on the « **Views your Orders** » modal 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:

View Sales Orders			1
			Merchant <input checked="" type="radio"/> Customer
			7 All orders
New Sales Orders (1) 2			
Customer	Order No.	Date	
ALL AND MORE	25770	4/22/2022	
Sales Orders in Progress (1) 3			
Customer	Order No.	Date	
ALL COLOURS Esbjerg	25649	4/19/2022	
Completed Sales Orders (1) 4			
Customer	Order No.	Date	
Inframe	25328	3/31/2022	
Cancelled Sales Orders (7) 5			
Customer	Order No.	Date	
CHEERIO SPIRIT GmbH	24742	3/8/2022	
ALL AND MORE	24675	3/4/2022	
DESTINATION GRAND EST SARL	24653	3/3/2022	
FRANCH'EVASION SARL	17543	6/28/2021	
COM'EVENT SOLUTIONS SAS	17425-5	6/24/2021	
			6 >> View more



1. Merchant / Customer toggle switch



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.

2. New Sales Orders

**New Sales Orders (1)**

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

3.

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.

4.



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

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



5.



Click Edit icon to change the State of the Order.

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



Change state - move order to:

- 1 In progress
- 2 Finished
- 3 Cancelled

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.

6. 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.

7. 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).

8. 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 at 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.

9. 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.



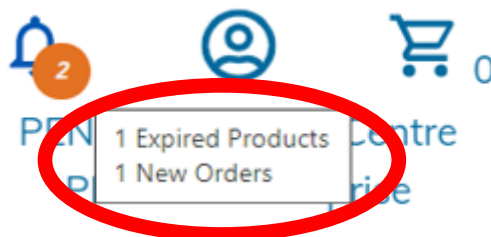
## 14. Notifications for New Orders and/or Expired Products



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.



## 15. 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

## 16. 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.