



User Guide

Getting Started with Shopiago Trade-in

Version 1.0.5

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Overview

Shopiago is a proud member of World of Books Group. The Group is comprised of three re-commerce technology businesses: Ziffit, World of Books, and Shopiago. It all began with a bag of books, rescued by book-loving entrepreneurs from a charity shop bin destined for landfill. Our founders recognised an opportunity to save books from waste by reselling and rehoming surplus stock that charity shops are unable to sell.

The idea behind Shopiago Trade-in is to give power to the charity shops themselves - so they can trade in old books, CDs, DVDs, and games directly with us and turn all that overstock into cash for the charities themselves.

User Role

-  **Account Owner/Admin** - A user with this role is typically the head of a charity who would be responsible for the use of Shopiago Trade-in across their shop locations. The Account owner or Admin can manage all users and have access to management information (MI) from any shop or users. With such functions, the account owner/admin would need to keep the company bank account and other information up to date. This user can reach trades status and generate reports for every shop in the company. However, they cannot scan or trade due to Shopiago's restrictions policy.
-  **Area Managers** - This user is solely responsible for reporting. The Area Manager is primarily designed to be able to see multiple Shops' reports within the same area code. This user can generate reports and monitor user performance, but cannot scan or trade.
-  **Shop Manager** - This user is typically an individual working in a charity shop who has responsibility for other users who scan products into Shopiago Trade-in. A Shop Manager user can generate reports, access the status of trades, and monitor user performance within their own shops. This user can also scan items to trade if necessary.
-  **Shop Assistant** - is a role designed for users working in a charity shop who are responsible for scanning products into Shopiago Trade-in, packing them ready for transit, and arranging collections with our courier partners. A shop assistant does not have access to any management information (MI) but is able to see offered prices.
-  **Shop Lister** - This user is likely to be an individual working in a charity shop who has responsibility to scan and trade items. A shop lister does not have access to any management information (MI) or reports. However, they can see offered prices.
-  **Volunteer** - This user's responsibility is to scan and trade items. A shop volunteer does not have access to any management information (MI), reports, or prices offered.

1.0 Getting Started

This user guide will help you to get started with Shopiago Trade-in. The process of starting to use Shopiago Trade-in for your charity begins with our Admin team within Shopiago. They will help you by inputting the initial information for:

 The primary location and contact details of the charity.

 The Shopiago Trade-in Admin details.

Once this process is complete, an automated email is sent to the Shopiago Trade-in Admin, with a link which they can use to register their account.

Once registered, a Trade-in Admin will then be able to invite Shop Managers and Shop Users, who will also receive welcome emails with a link to register their accounts.

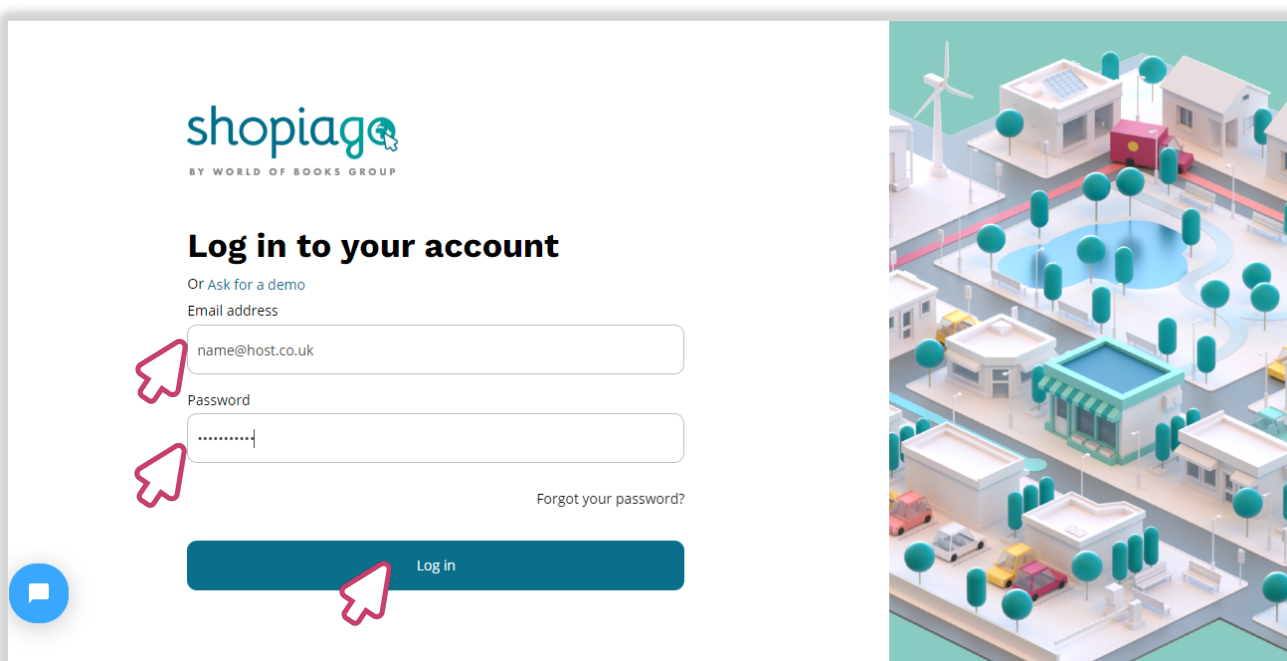
Please note: The invitation to register is an automated service, so please check all spam and junk folders if you cannot see the email.

Once you click on the registration link in the welcome email, you will be redirected to an online form where you will enter your name and a new password for your account.

Congratulations! After the registration is complete, your account is now set up and you are ready to start trading!

1.1 The login screen

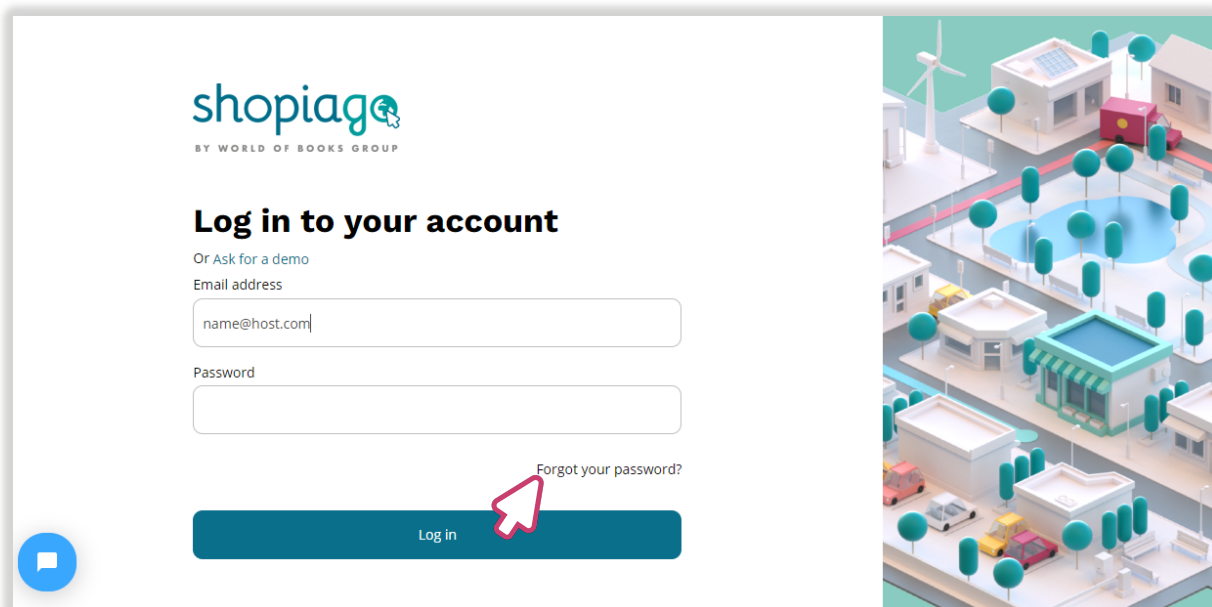
To log in, you will need to enter your registered email address into the "Email Address" field and your password into the "Password" field. Once that is done, click the blue "Log in" button.



If you are having problems signing in to your account, here are a few tips that may help you:

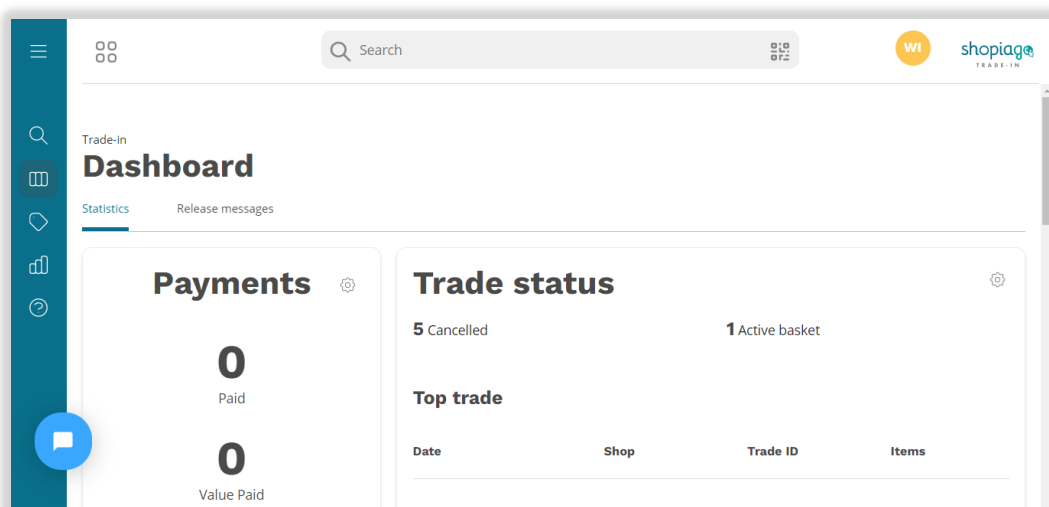
1. Make sure you are using Google Chrome or Firefox as your browser.
2. Check that your username and password are correctly entered.
3. Try clearing your browser history and cache.
4. Try using Incognito mode (Ctrl+Shift+N).

If you have tried the above and you are still having problems, try resetting your password by clicking on the "Forgot your password" link and enter a new password from the next screen.



Once successfully logged in, you will land on the Dashboard. On the left-hand side of the screen are the menu icons, which allow you to navigate around the platform.

It will look like this:









We'll now go through each of these menu icons and discover what you can do.

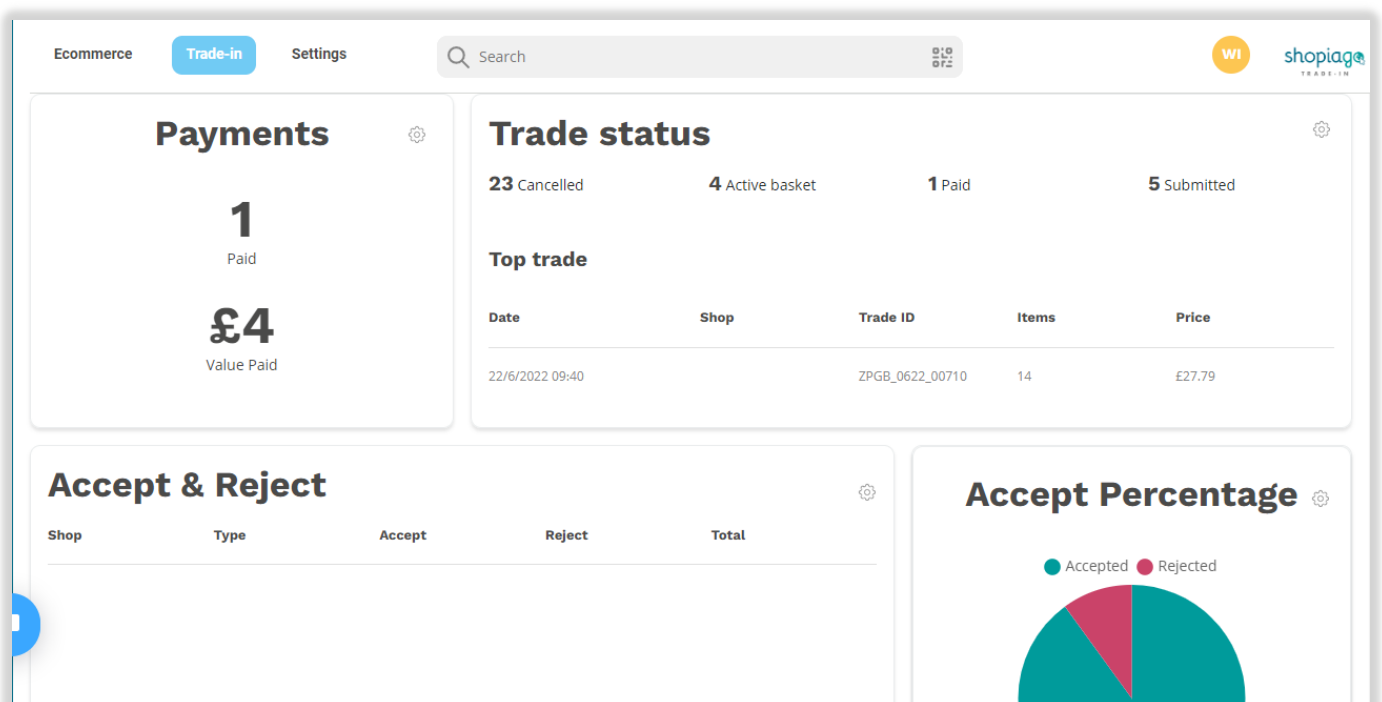
2.0 The Dashboard

You will be presented with the Shopiago Trade-in Dashboard when you first log in. The Dashboard will show you the most important information at first glance.

You will be able to see:

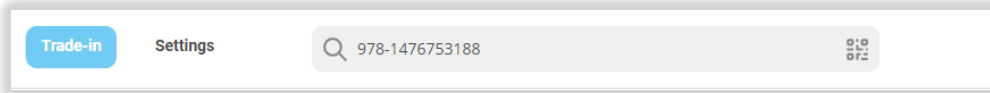
-  The search box and barcode scanner are found at the top centre of the Dashboard, which can be used to scan items to trade.
-  The user's name icon at the top right corner, displays your name, role(s), and a logout tab.
-  The payment section displays the total number and value of trade payments received by your shop.
-  Trade status displays the number of all cancelled, active baskets, and submitted trades, as well as the top trade by shop.
-  The number of items accepted or rejected, which is also presented in a pie chart and bar graph.
-  And Individual shop user performance.

There is also a "settings cog" icon at the top right of each section of the Dashboard, which allows you to filter relevant data by months, year, weeks, and shops.

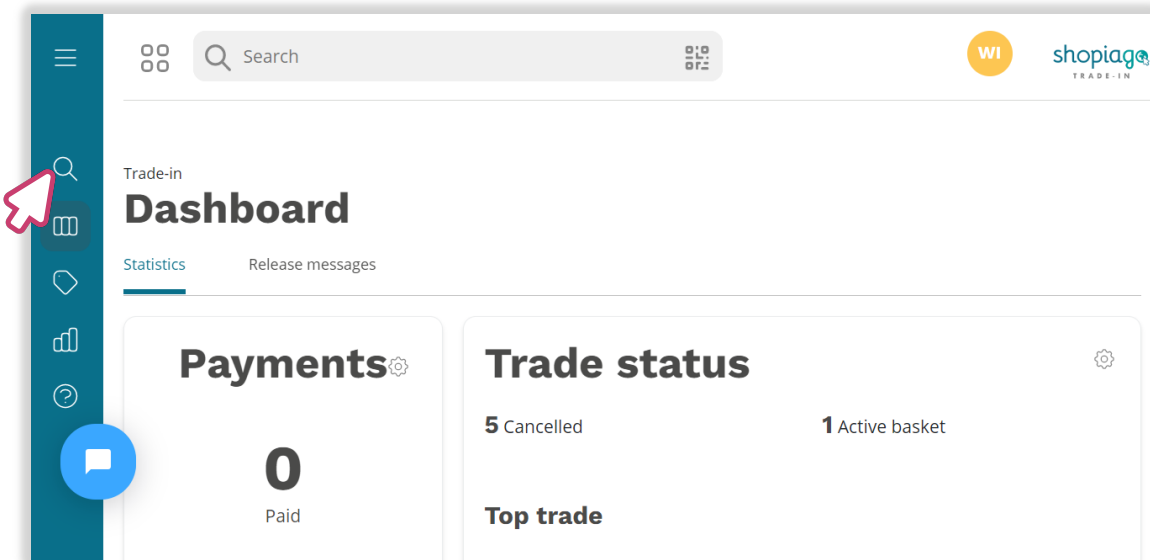


3.0 Scan Products


You can start scanning products to trade by entering the item ISBN/EAN into the search bar at the top-centre of the Dashboard or by clicking on the barcode scanner icon when using a hand-held scanner. This will lead you to the scanning page, where you can scan other items.




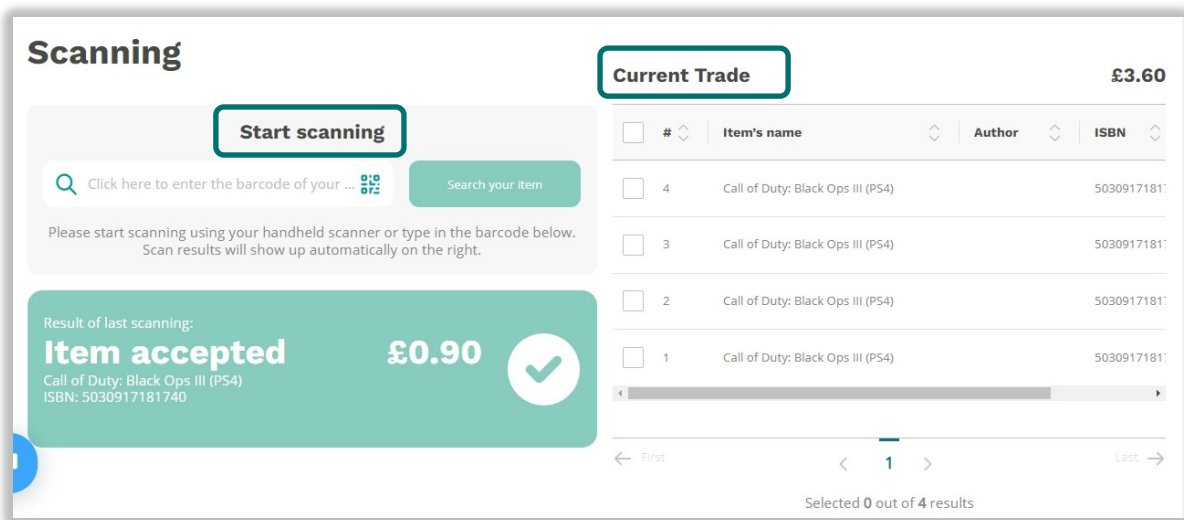
The "Scan Product Now"  icon on the Dashboard menu will also lead you to the scanning page where you can scan other items to trade.



The scanning page is divided into two sections:

 The "Start Scanning" section is where you can manually type item barcodes or use a hand-held scanner to scan items into your trade.

 The "Current Trade" section populates a list of all accepted scanned items, as well as a checkout option once scanned items have reached a minimum of £20.00.



3.1 Start Scanning

The start scanning section is the main area where all items will be scanned into a trade, with the scan result displayed.

Start scanning

Click here to enter the barcode ...

Search your item

Please start scanning using your handheld scanner or type in the barcode below.
Scan results will show up automatically on the right.

Result of last scan:
Item accepted £0.40

Doom (PS4)
ISBN: 5055856403319

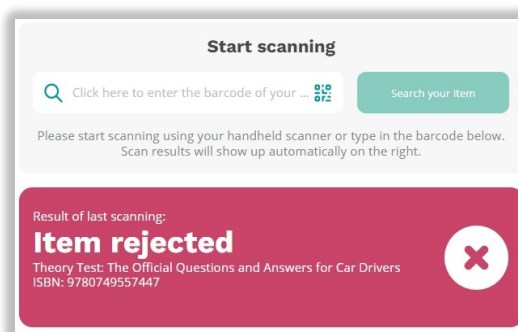
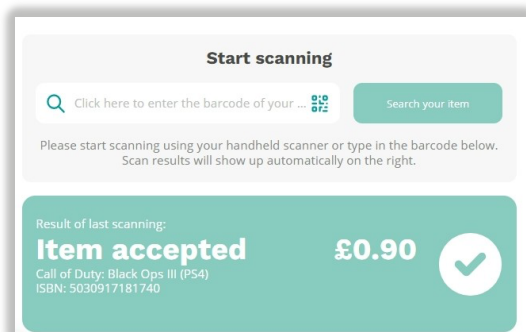
To scan items with a hand-held scanner, you need to connect the scanner to your PC, making sure you have installed all the necessary drivers so your PC can recognise it as an input method. Then you are ready to start scanning.

You can add barcodes in the following ways:

- Using a handheld scanner (recommended)
- Using a camera when using a mobile device
- Manually typing the ISBN / EAN into the barcode field

Once your ISBN / EAN is entered into the barcode field, click on the 'Search your item' button (the green button) or press "Enter" on your keyboard to add the item to the current trade once accepted.

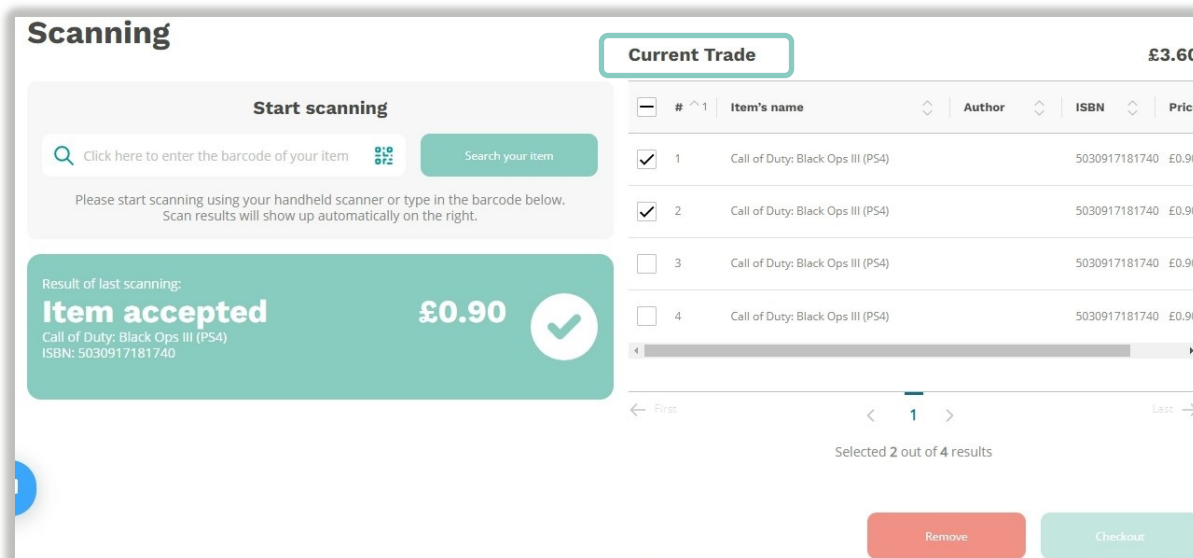
If your item is accepted, a green tick will appear at the bottom of the scanning section, showing 'item accepted' along with the offered price. If your item is rejected, a red cross will appear at the bottom of the scanning section, showing 'item rejected'.



After all your items have been added to your current trade, scroll down to the bottom of the page and click on the blue "Checkout" button to go to the next step of the trade.

3.2 Current Trade

This is where all scanned items will appear in a list view. The most recently scanned item will appear at the top of the list.



The arrows next to the header of each column will allow you to sort the items in your trade. The arrows for the "Items" column will sort the current trade alphabetically and the arrows for the "EAN" list will sort the current trade numerically.

To remove item(s) from your current trade, simply select the item(s) and scroll down to the bottom of the current trade section and click the "Remove" button.

Once you have added all the items that you want to trade and have reached a minimum of £20.00, you can click on the "Checkout" button, which is found at the bottom of the current trade section.

PLEASE NOTE: If you see an error message after clicking on the "Checkout" button which reads: "Trade Create Failed! - DPD Contact Not Set" this means DPD contact details are not set for the shop. The account owner or administrator has to enter DPD contact details for all Shopiago Trade-in locations.

To enter DPD contact details, please navigate to: Settings > Locations > Select a shop from all locations > Click the Actions button at the top-right of the page > click on Edit DPD contact > Add required information > and then, save the changes. Once you return to the "Current - trade" page, you should now be able to checkout. This will only need to be done once, not every time you complete a trade. These details can also be changed at any time.

4.0 Checkout


Once you have clicked on the "Checkout" button, you should see a screen like this:


The screenshot shows the 'Checkout' page for a trade-in. The top navigation bar includes 'Trade-in', 'Settings', a search bar, and the Shopiago logo. The main content area is titled 'Trade-in Checkout' and is organized into several sections:

- Trade Summary:** Shows 'Items: 42' and 'Value: £21.60'.
- Address:** Lists 'Country: United Kingdom', 'County: West Midlands', 'Town: Coventry', 'Address: 150 Wilson Road', and 'Postal Code: CV10 7PJ'.
- Promotional Code:** Features an input field with the placeholder 'Please insert promo code' and an 'Add' button.
- Pallet Collection:** A toggle switch is currently turned off.
- Packing Guidelines:** Includes instructions: 'Stack boxes neatly', 'Place books in a row', and 'Place a label on each box'.
- Packages:** A dropdown menu shows '1' package selected.
- Shipment Date:** An input field shows '20/7/2022' with a calendar icon.

At the bottom, there is a green 'Complete and Print' button and a red 'Cancel' button. A red notification icon is present in the bottom left corner.

 The top left side of the screen is the "Trade Summary" - this displays a summary of the total number of items in the trade and the total trade value (The item value will only appear depending on the user privileges).

 The Address section on the top centre of the page displays the "collection address" - this is set as default and cannot be modified during checkout. If the address is incorrect, please contact the account owner or administrator for any adjustments.

 The right-hand corner is the "Promotional Code" area, where you can enter and apply a promotional code you may have received from Shopiago. When you click on the promotional code field, enter the code and click on the "Add" button to apply the code.

When you scroll down the checkout page, you will see the last section of the checkout process which looks like this:

Pallet Collection

Packing Guidelines
Stack boxes neatly
Place books in a row
Place a label on each box

Packages
Please select the correct amount of packages you have used.
1

Shipment Date
14/1/2022

Please ensure a label is stuck onto each box and that all items have been packed securely. Once this is done please complete the order.

Complete and Print Cancel

🔍 If you are sending “Packages”, you will need to set the correct number of packages that are being booked for collection by using the arrows to add or by entering the number into the “Packages” field. (Please keep in mind that this is the total number of package(s)/box(es) that the courier will be expecting to collect, not the number of individual items in the trade.) Be sure to stack boxes neatly and have the trade ID clearly written and attached to each box.

🔍 On the right-hand side of the page is the shipment date. You are required to set the actual date you intend to handoff the package(s) to the courier by using the date selector and work your way through this process.

🔍 If you are sending Pallets, you will need to turn the ‘Pallet collection’ toggle switch to the right. For customers based in the Republic of Ireland, the “Pallet collection” option will be turned on automatically. You will need to set the correct number of pallet(s) that are being booked for collection by using the arrow or by entering the correct number into the pallets field. (Please note: this is the total number of pallet(s) the courier is expected to collect, and not the number of individual items in the trade). Also, ensure that the items are placed in a row and have the trade ID clearly written and attached to each box.

Pallet Collection

Packing Guidelines
Stack boxes neatly
Place books in a row
Place a label on each box

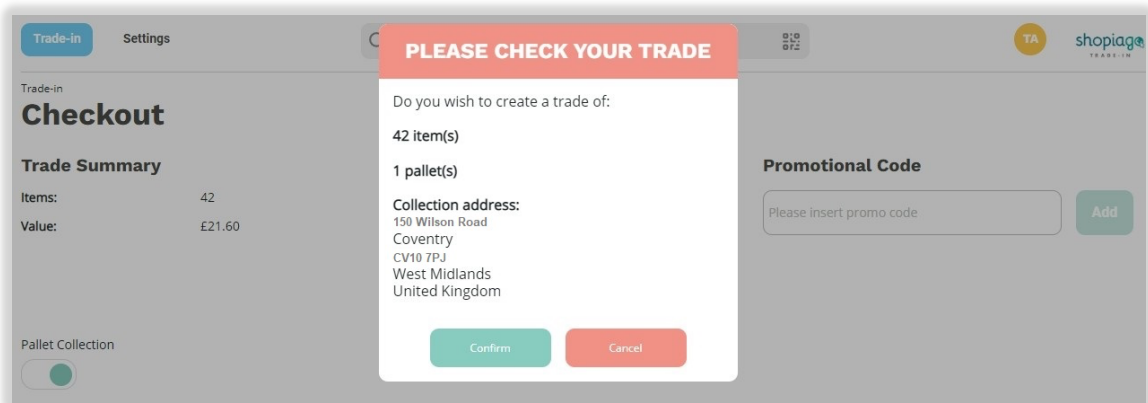
Pallets
Please select the correct amount of pallets you have used.
1

Shipment Date
14/1/2022

Please ensure a label is stuck onto each box and that all items have been packed securely. Once this is done please complete the order.

Complete and Print Cancel

👉 Once everything is done, click on the “Complete and Print” button! A pop-up screen will appear asking you to confirm the trade.



By finalising the trade, a PDF manifest will automatically be downloaded to your PC for your reference, containing the trade information. You will then be redirected to the trade details page.

If you have a printer, you can print the manifest and place it in the box if you wish, but this is not required as DPD will produce the labels needed for collection. Alternatively, clearly writing the trade ID on a piece of paper and attaching it to the outside of every box will be sufficient. (e.g., ZPGB_XXXX_XXXXXX).

4.1 Trade details page

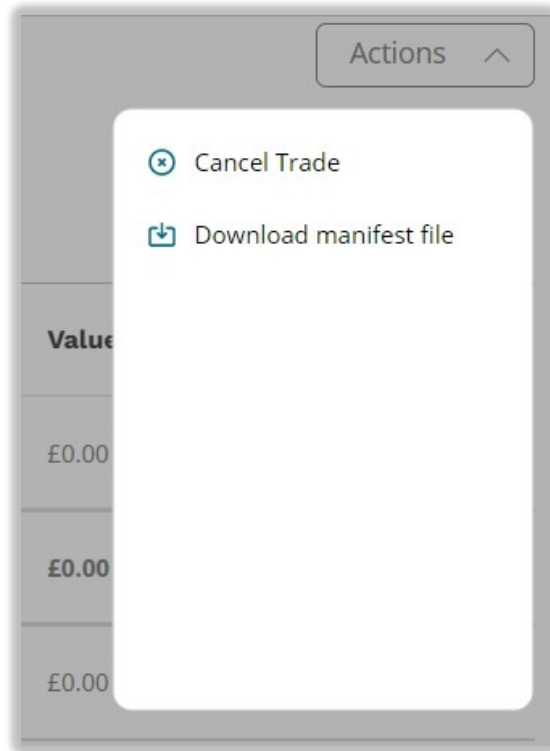
👉 Once the trade is submitted, you will be redirected to the trade details page where you will see all the information relating to the trade. For example, the submission date, trade status, trade total values, etc.

The screenshot shows the 'Trade details' page for a submitted trade. The trade ID is ZPGB_0222_00649, the status is 'Submitted', there is 1 package, and the date is 6/7/2022 10:02. The page features a table with columns for 'Scanned', 'Scanned price', 'Accepted', and 'Value'. The table lists items like 'Book' and 'Game' with their respective counts and prices. A 'Trade Total' row shows a total value of £0.00. A red notification bubble is visible in the bottom left corner.

	Scanned	Scanned price	Accepted	Value
Book	7	£6.20	0	£0.00
Game	35	£15.40	0	£0.00
Items Total	42	£21.60	0	£0.00
Promotional Code			0	£0.00
Trade Total				£0.00

👉 On this page, you can “cancel” a trade by clicking the “Actions” button at the top-right corner of the page and then select “Cancel trade”.

👉 You can also re- download the manifest file by clicking the ‘Download manifest file’.



5.0 Trades

The Trades page allows you to view all trade activities on the account. You can use the filter options above the trade table to widen or narrow the information that you want to see. The trade table columns can be filtered by:

👉 Shop from which the trade came from.

👉 Trade ID.

👉 Trade status.

👉 Submitted date

👉 Paid date

👉 User who created the trade.

👉 You can also enhance your information search by using the add more options.

Once you have found the data or trade you are looking for, you can sort it with the arrows that appear on each side of the column headers, then click on the 'Action' button at the top right of the page to "Export Report" as a CSV file.







Trade-in

Trades

Shop Trade ID Trade Status Submitted Date Paid Date Users + Add more options

Trade ID	Shop	User	Status	Number of Items	Price	Created
ZPGB_0622_00393	Jo's Juice Bar	Jo's Juice Bar	Active basket	25	£12.94	13/6/2022
ZPGB_0422_00181	Kama's Crochet Sanctuary	Kama Shop Manager New	Active basket	0	£0.00	7/4/2022
ZPGB_0622_00823	Leanne's Coffee Parlour	Leanne's Coffee Parlour	Active basket	8	£20.45	24/6/2022
ZPGB_0222_00626	Kristy's Kazoo Kabin	William	Active basket	0	£0.00	24/2/2022
ZPGB_0622_00767	Leanne's Coffee Parlour	Leanne's Coffee Parlour	Cancelled	10	£0.00	23/6/2022
ZPGB_0622_00710	Mel's Doggie Day Care	Mel's Doggie Day Care	Submitted	14	£27.79	22/6/2022

To see other information on the trade table, use the page scroller at the bottom of the trade table and scroll right. You should now be able to see:

-  The trade status.
-  The number of items.
-  The trade price for those items.
-  The total number of book/media items in the trade.
-  The date the trade was created
-  The submitted and paid dates.

If, for any reason, you want to cancel the trade, hover your mouse around the item, then move your mouse pointer to the right and click on the appearing arrow. On the next screen, click on the 'Actions' button (top-right) and select 'Cancel Trade' from the pop-up screen.

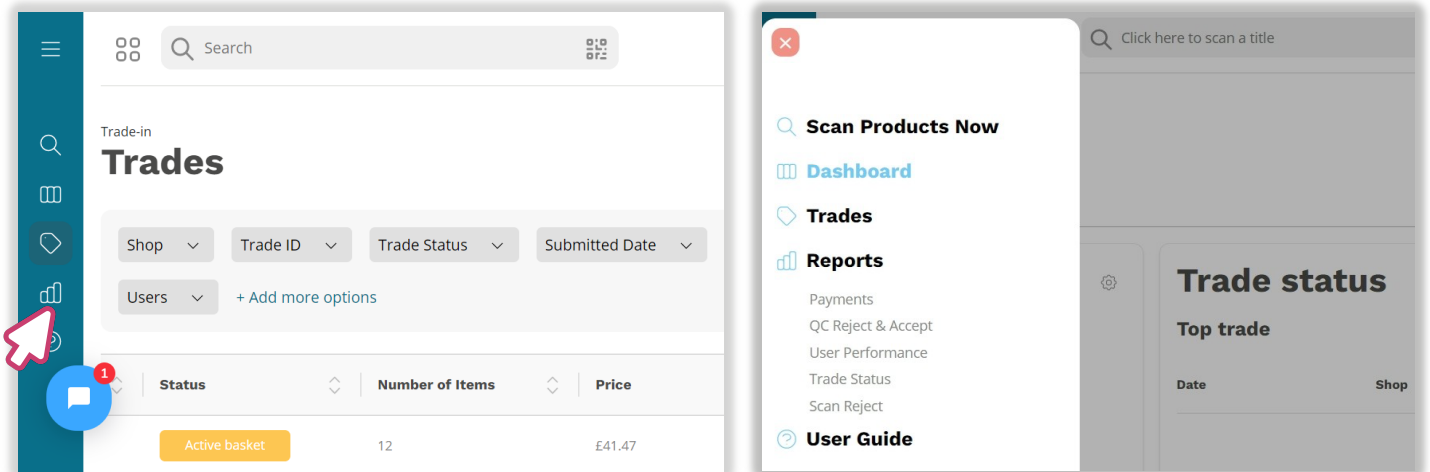
Submitted Date Paid Date Users + Add more options

Price	Created Date	Submitted Date	Paid Date
£0.00	9/2/2022 08:21	14/2/2022 08:13	
£0.00	1/2/2022 14:52	1/2/2022 15:03	
£0.00	26/1/2022 08:13	26/1/2022 08:51	
£0.00	25/1/2022 12:21	25/1/2022 15:28	

6.0 Reports

The Trade Reports provide various features that can be used for analysing user performance, payments, trade status etc. The report tool also provides a visual representation to help you identify current data and monitor trade progress across all shops. The report features will only appear depending on the user privileges.

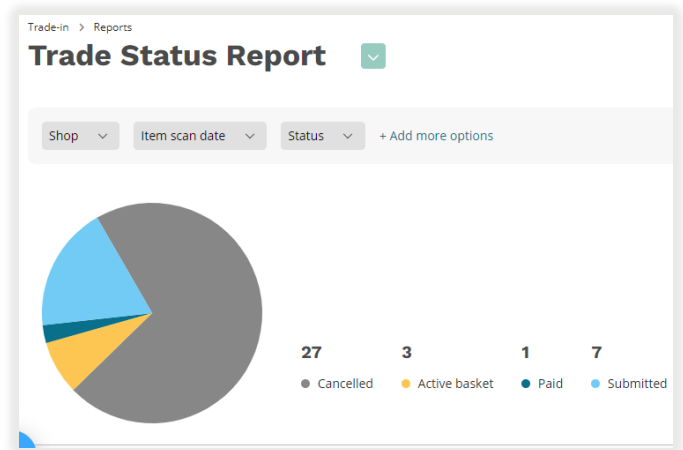
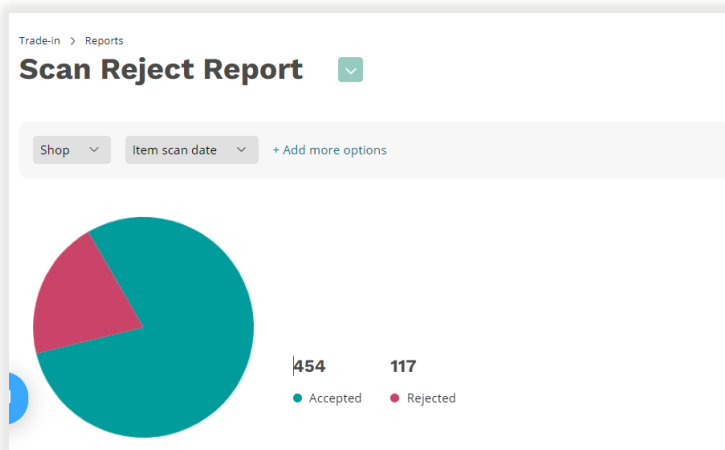
Once you click on the 'Reports' icon on the Dashboard left-hand menu, it will open a pop-up menu where you can select the type of report you are looking for.



The reports available are designed to be easy to use. However, it is important to note the distinction between the **QC Reject & Accept report** (The number of items accepted into a trade but failed quality control checks when received into the Warehouse) and the **Scan Reject report** (the number of items which are rejected from being added to a trade).

The pie chart presented in the scan reject and trade status report areas displays visual data as a percentage in each category along with the total counts of trade activities across all shops on the account.

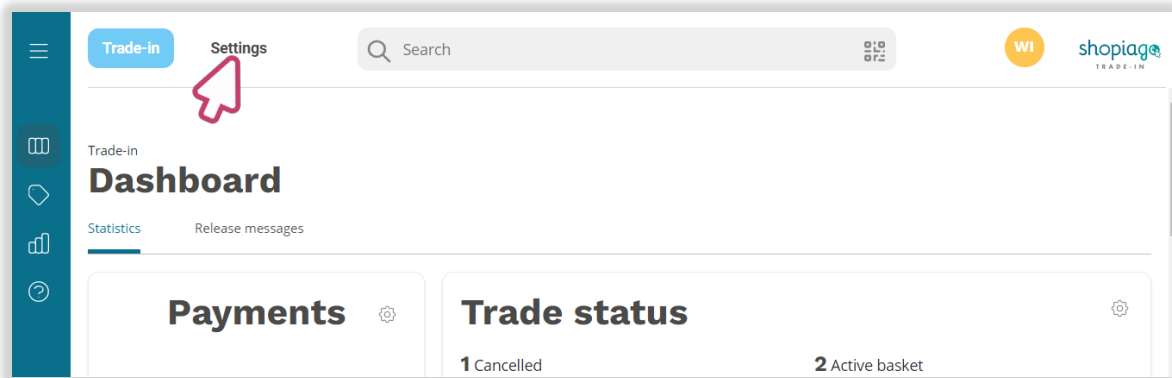
Each of the reports can be filtered by shop and by date range. They can all also be exported for reconciliation purposes.





7.0 Accessing account settings

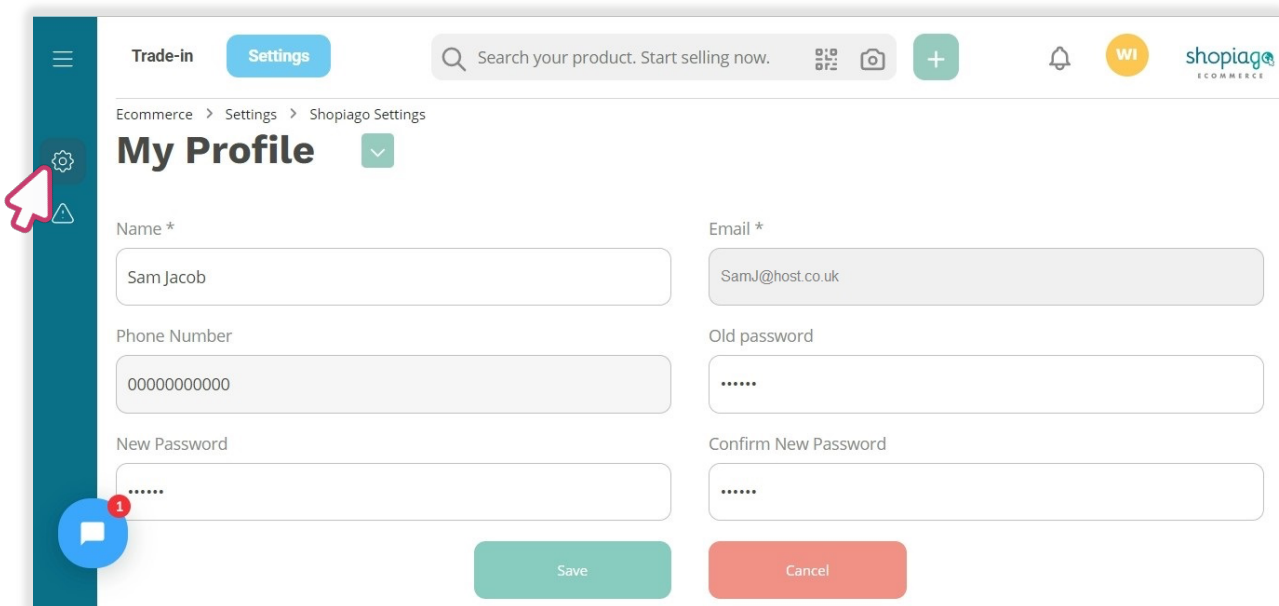
The settings button found at the top left-hand side of the Dashboard can be used to add, update and manage the account information. However, the features that appear within the settings menu will depend on the user's privileges.

 To edit your account settings, click on the 'Settings' button at the top left-hand side of the Dashboard.



 You will now have access to edit your "Profile", where you can edit your personal details like your name, email address, and phone number. Remember to click the "Save" button once changes are made.

 You can then click on the Settings icon in the left-hand menu to access "Account Settings," "Bank Account," "Location," "Users," etc.

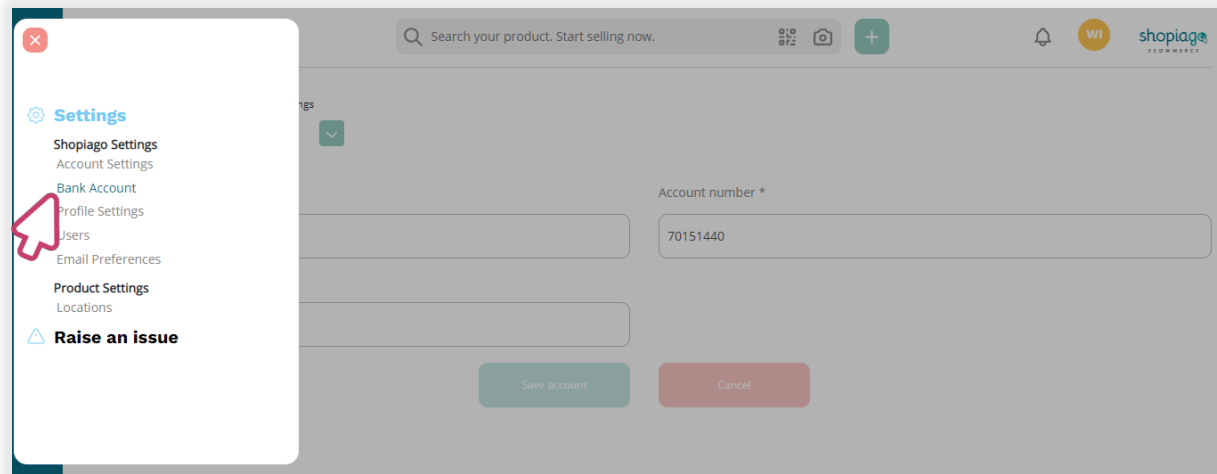


Adding Bank account information

Only the Account owner or Admin user can add or update the bank account information.






Shopiago Trade-in will only use one bank account for the entirety of your charity/organisation, so it is imperative that these details are correctly entered.

To add or update the bank details, click on the 'Bank Account' in the settings drop-down menu, then add or update the bank details, and click 'Save' on the next screen.





Users

You can use the "Users" tab on the settings menu to:

-  Add new users to the account.
-  Modify user details.
-  Manage existing users' role and privileges.
-  Inactivate the user (without deleting the user).
-  Delete the user from the account.

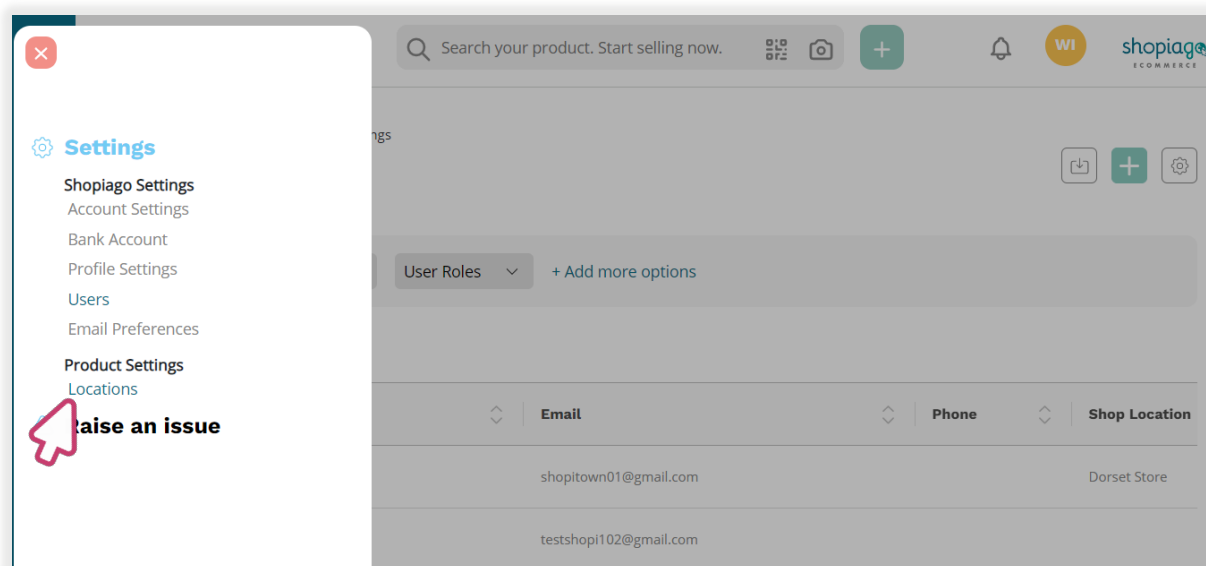
A full table of permissions is also included on the "Users" page:

A screenshot of the Shopiago 'Users' page. The page has a breadcrumb trail 'Ecommerce > Settings > Shopiago Settings'. The title 'Users' is followed by a dropdown arrow. There are three icons: a share icon, a plus icon, and a settings icon. Below the title, there are filter dropdowns for 'Email', 'User Group', and 'User Roles', along with a '+ Add more options' link. The main content area shows two tabs: 'Users' (selected) and 'Invited members'. Below the tabs is a table with columns: 'Active' (checkbox), 'Name', 'Email', 'Phone', 'Shop Location', and 'User Group'.






Active	Name	Email	Phone	Shop Location	User Group
<input type="checkbox"/>	 Myname	Myname@org.uk		DéKezdKiborulni	User
<input type="checkbox"/>	 Myname	Myname@org.uk	32		User

Adding a location is an important step once your account is created. For collections to happen, you must tell us where to collect from. Only the account owner or administrator has the privilege to add locations to a Shopiago Trade-in account. You can have one or more locations depending on your operations.

From the Settings menu, under “Product Settings”, you will find “Locations”.



Here you can:

-  Add new shop locations.
-  Update details of existing shops.
-  Enable e-commerce module.
-  Disable shops (without deleting them).
-  Set DPD contact details.

Please note: The “Add New Location” and “Grid Settings” icons will be visible on the page. The “Actions” button will only appear once you’ve selected one or more shop’s location on the locations page.

DPD contact information is required before starting to scan items to trade. If you have multiple locations, then you will have to add DPD contact information for each shop location, otherwise checkout after scanning will not be possible. A contact name and email address are a requirement in order to submit a trade.

Once you have selected a shop location, click on the 'Actions' button in the upper right-hand corner of the page.

Click on 'Edit DPD contact' and enter the required contact information on the next screen.

Ecommerce > Settings > Product Settings

Locations

Location type + Add more options

Enabled	Default	Name	Ecommerce	Trade-in	Collection
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	London Trade-in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Trade-in Location	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Dorset Store	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- Set to Default
- Disable
- Product settings
- Modify
- Edit DPD contact**
- Delete

Now click on the 'Save contact' button.

DPD Contact

Contact name *

Contact email *

Contact phone *

Always remember to keep the DPD contact details up to date, to avoid the possibility of failed collections.

Who to contact:

If you need any further support, please contact our team by emailing trade-in@shopiago.com .

For system related concerns and to report bugs or faults, please raise a ticket using our Service Desk:

<https://worldofbuzz.atlassian.net/servicedesk/customer/portal/2>

