

How to get to your start-point?

To first reach the point where you can sign-in to ShopNearBuy the following must already have taken place.

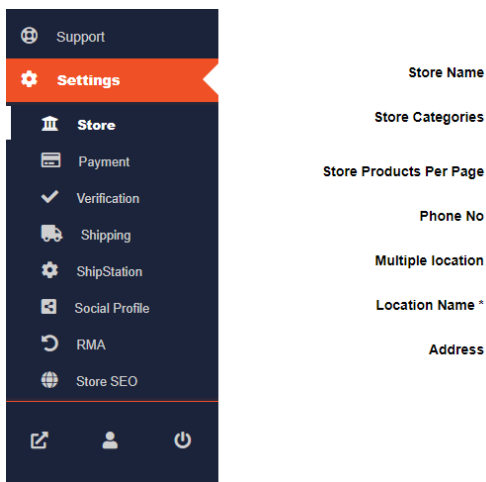
- (1) You (or someone on your behalf) have taken the option to **Add Your Shop** from the top right-hand side of the home page www.shopnearbuy.ie This is a once-off activity and you need to provide some details about you and your shop. When completed you shall then have a user id and a password for future use. This will allow you to sign-in at any stage to your account.
- (2) The email you provided in the above **Add Your Shop** option needs to have also been verified by you. If you have not seen this verification email you may want to check if it has been routed to your Spam email folder. Take the option on the email to verify the email address (this confirms that you are who you say you are).

Signing into ShopNearBuy

Go to the page www.shopnearbuy.ie and take the option on the top right hand side called "Sign in". On successful sign-in you will be presented with your own:

The screenshot shows the Retailer Dashboard interface. At the top left, there is a red 'Dashboard' button. Below it is a dark navigation sidebar with icons for Products, Orders, Request Quotes, Coupons, Reports, Delivery Time, Reviews, Return Request, Staff, Followers, Analytics, Announcements, and Tools. The main content area features a '75% Profile complete' progress bar and a prompt to 'Add a Payment method to gain 15% progress'. A summary table displays key metrics: Sales (€55.96), Earning (€0.00), Pageview (28), and Order (0). Below this is an 'Orders' table showing a total of 1 order. To the right, a 'Sales this Month' line chart tracks 'Sales total' and 'Number of orders' over time, showing a sharp drop from the first data point to zero for the remainder of the month.

And the menu continues below once you select “Settings” from the menu. It is within this “Settings” option that the initial important set-up is done



All the various activities you want to carry out are contained within this dashboard. It is made up of 3 broad sections:


- (1) Getting ready to accept orders (this is the initial preparation step)
- (2) Working with sales orders
- (3) reporting

The following box diagram identifies which section & option to take from the dashboard depending on which activity you wish to address.


Section	Topics covered	Section of the dashboard
1	Getting ready to accept orders <ul style="list-style-type: none"> • Setting up and changing your store → • Changing account (e.g. password) → • Connecting with Stripe → • Setting up delivery options and rates → • Setting up and changing your products → • Introducing coupons / vouchers → • Nominating other staff to also be users → 	Settings / Store Edit account (icon of person) Settings / Payment Settings / Shipping Products Coupons Staff
2	Working with orders → <ul style="list-style-type: none"> • Finding new orders • Processing the orders • Printing documents (invoices & packing slips) 	All within Orders


3	Reporting → <ul style="list-style-type: none"> • Sales (what you have sold) • Earnings (what you have earned from sales) 	All within Reports
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Notes:

 Stripe is the credit card processing system used by ShopNearBuy AND the means by which you shall be automatically paid.

 When new orders are received by your store you will also receive an email to alert you

 The majority of time you will likely be using section 2 above which means it will be the **Orders** section within the Dashboard which you will use most. To change prices on products or put products on hold you will then need to occasionally use Section 1 = The **Products** section (mostly in Edit mode – by selecting EDIT from the list of products where many aspects of your products can be edited).


 Earnings does NOT take into consideration the amount you as the retailer may need to pay the delivery company for the delivery service. The amount for delivery shown against an order is the amount you have decided to charge the customer for delivery (if any). This amount may not be the same as the amount you will need to pay the delivery company for the delivery service. The amounts paid to the delivery company are not part of the figures presented here and are outside of the site.


Working with the Settings options

These “Settings” options are the various options which control how you want your on-line store to work. They are grouped into various sections

The options within **Store** section may change over time. You should review these as often as required and make any changes you feel are necessary.

This information is about you and your store.

 you may enter an address beside the map to allow matching with known addresses from the map. You may also move the PIN on the map to position your store correctly on the map.

 Don't forget to hit the Update Settings button at the bottom of the screen to update your site.

The **Payment** section is an important step which needs to be set-up during store set-up and before you accept any orders. This step will allow you to connect your store with Stripe (online payment processing). If you already have a Stripe account then you can use this account (by logging in with your Stripe credentials) to connect your existing Stripe account with ShopNearBuy and therefore automatically receive payments from ShopNearBuy.

If, however, you do not have an existing Stripe account then you will need to answer the various questions about you, your company (if applicable) and your bank details. This will have the effect of creating your own “mini” Stripe account to allow you receive automatic payments from ShopNearBuy.

Once set, these Stripe details are unlikely to change in the near future and you shall receive your payments automatically from Stripe.

The **Shipping** section allows you to define any delivery charges which you want to apply to your orders. E.g. a collection option (with or without a charge), a flat fee for delivery and any rules for free delivery based on a minimum order value. You may also define your shipping policies also here to inform customers about your delivery policies e.g. which days of the week you desptch orders, which delivery service you use etc.

ShopNearBuy can advise you how this section can be set-up depending on the delivery charges you wish to have applied to your orders.

Here's how you can set up the delivery charges:

The first decision is whether you want to apply the same rules for delivery to “everywhere” or whether you want to have different delivery rules for delivery in your local county or country. So you could have a different delivery charge policy for Ireland, EU and Rest of World.

- Products
- Orders
- Request Quotes
- Coupons
- Reports
- Delivery Time
- Reviews
- Return Request
- Staff

Store

A shipping zone is a geographic region where a certain set of shipping methods are offered. We will match a customer to a single zone using their shipping address and present the shipping methods within that zone to them.

If you want to use the previous shipping system then [Click Here](#)

Zone Name	Region(s)	Shipping Method
Locations not covered by your other zones	Everywhere	Flat Rate
Ireland	Ireland	Flat Rate, Free Shipping

Pick the zone for which you would like to “edit” the delivery charges. Within this edit you may then create a new method of shipping like the following:

Add Shipping Method

Choose the shipping method you wish to add. Only shipping methods which support zones are listed.

Flat Rate

- Select a Method -

Flat Rate

Local Pickup

Free Shipping

If there are already delivery charges set-up then you will see a screen as below:

Shipping Method Add your shipping method for appropriate zone

Method Title	Status	Description
Delivery charge <small>Edit Delete</small>	<input checked="" type="checkbox"/>	Delivery charge
Collection	<input checked="" type="checkbox"/>	Collection from Shop
Free Shipping	<input checked="" type="checkbox"/>	Lets you charge a rate for shipping

[+ Add Shipping Method](#)

[← Back to Zone List](#)

[Save Changes](#)

The delivery charge would be the amount you want to charge e.g. 10 courier charge for delivery anywhere in Ireland. The collection charge may be zero if you do not want to charge a customer to collect the order. The Free shipping option allows you to specify what the minimum order value is in order to qualify for free delivery.

Take the edit option to change or the delete option to remove the charge.

Edit Shipping Method

Title
Packaging & Postage

Cost
9.50

*Enter a cost (excl. tax) or sum, e.g. `10.00 * [qty]` . Use `[qty]` for the number of items, `[cost]` for the total cost of items, and `[fee percent='10' min_fee='20' max_fee='']` for percentage based fees.*

Tax Status
Taxable

Description
Lets you charge a rate for shipping

Save Settings

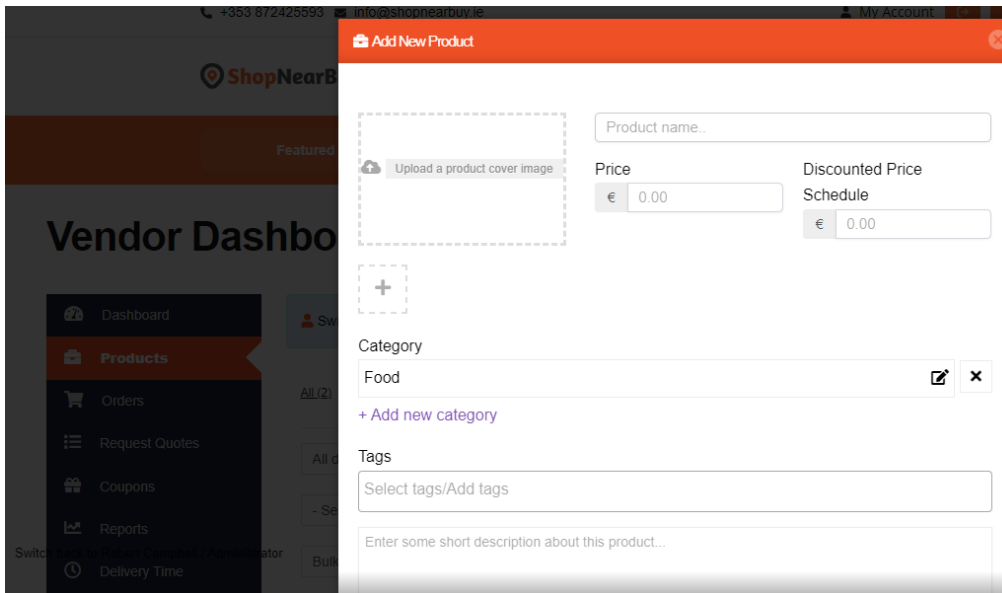
In the above example the flat rate charge of 9.50 is being created for Packaging & postage which includes VAT/tax.

💡 Where VAT is taxable (so tax status above needs to be “taxable”) then you need to enter the values as follows: If you want the delivery charge to be €10 including VAT at 23% then enter a figure of 8.13. The tax will then be applied at 23% with a total delivery charge of €10. This breakdown will be needed for VAT calculations.

💡 Don't forget to hit the Save Settings button at the bottom of the screen to update your site.

Example of day-to-day use – adding or changing products.

Within **Products** you can add new products that you sell or change the details about any existing products.



Here are some useful tips about products:

💡 you will need an image of the product to attach to the product so it is displayed on the store. You may already have some images which are used by you somewhere else. Try and locate these so they can be used again here.

💡 Assigning a category may help consumers find your product. If none of the existing categories are suitable you may add your own category here.

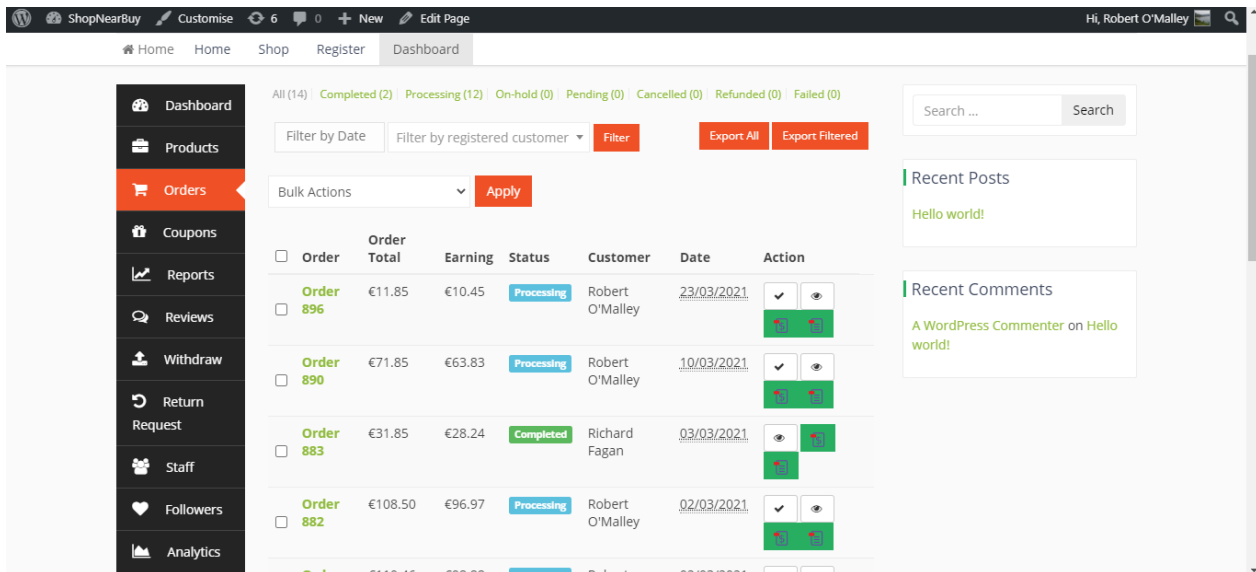
💡 Tags are also very useful. E.g. if you were selling fish products the descriptions of the products may refer to the type of fish (smoked salmon, peppered herring) but perhaps no mention of the word fish. By attaching a tag of “fish” if a consumer uses the word “fish” as part of their search then your products will now be found in that search.

💡 You may decide whether you require inventory management and therefore (1) know what the current stock position is and (2) not sell any product where there is insufficient stock. Switching this OFF means that all orders will be taken irrespective of stock position and it will be up to you as retailer to find the stock within the required delivery time.

💡 Don't forget to hit the Save Settings button at the bottom of the screen to update your site.

Example of day-to-day use – finding a new order and despatching it.

You will receive an email for every new order received. Whenever you wish to despatch this order or simply view the orders received you should log-in, go the Vendor Dashboard and select “Orders”



A list of all orders is displayed showing the latest order first. There are 2 broad options open to you to work with orders.

Option 1 – select one (or more) orders and also select one of the Bulk Actions e.g. “change status to completed”. This will immediately change the status on all orders selected to be now “completed”.

Alternatively use the ✓ option to also indicate that the order status should now be changed to “completed”

From this list you may also print or download (saving to one of your selected folders) the invoice and/or packing slip for this order. You may wish to include these documents with the despatched order.

You may use the filter options so that the list of orders matches the filter you require e.g. for a certain date or for a certain customer.

Option 2 Click into the green **order number** to access the order details

The screenshot shows the 'Orders' section of the dashboard. The left sidebar contains navigation options: Dashboard, Products, Orders (highlighted), Coupons, Reports, Reviews, Withdraw, and Return Request. The main content area is titled 'Orders' and shows 'Order#896 - Order Items'.

Item	Cost	Qty	Total	VAT
Ham Hocks	€8.13	1	€8.13	€1.87
Woo Click & Collect			€1.50	€0.34
	Discount [?]:		€0.00	
	Shipping [?]:		€1.50	
	VAT:		€2.22	
	Order Total:		€11.85	
	Refunded:		-€0.00	

The 'General Details' section shows:

- Order Status: **Processing** (with an 'Edit' button)
- Order Date: 23/03/2021, 11:58
- Earning From Order: **€10.45**
- Customer: Robert O'Malley
- Email: robert@minolatechnology.com
- Phone: 086 1234567
- Customer IP: 86.45.171.57

On the right, there is a search bar and two sections: 'Recent Posts' with 'Hello world!' and 'Recent Comments' with 'A WordPress Commenter on Hello world!'.



Remember the customer will have selected what collection or delivery service they required when they entered their order. That service and the related charge will be shown when you access the order details.

Within the order details there are a number of options open to you:

- (1) go to the Order status and take the green Edit button. The order status will be shown as “processing” when the order has been created and you may now change that status in line with your processing the order for delivery.
- (2) You may add a note to the order and mark it either for the customer to view or for your own internal purposes.
- (3) You may also add a tracking number if your delivery company has provided you with any.



When you make certain changes to the order e.g. changing the status to completed or adding a non-private note or adding tracking details an update email notification will be automatically sent to your customer.

- (4) You may also view and change any product/item information by clicking into the product item name in green. One example of this may be where you wish to indicate that you no longer have any stock – so you need to scroll down to Inventory/Stock status and select a stock status of “out of stock”.



This will have the effect that the product/item will not be allowed to be ordered.



How to use the order status: One suggested approach is to use the “completed” status to indicate that you have completed the picking & preparation of that order and that it is ready for either collection or delivery. Therefore, when you use this Orders list you may select the “processing” filter at the very top of the screen which will result in the list of orders being confined to ONLY those which have not yet been completed. This list will then represent the list of orders which require your action.