Standard Operating Procedure (SOP): Goozone Marketplace Dashboard Management

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Approved By: Platform Admin

1. OBJECTIVE & SCOPE

This SOP is a non-technical guide to navigating and managing the Goozone Marketplace Dashboard. Following it keeps orders processed correctly, products and categories structured, deliveries scheduled on time, and the platform maintained.

This SOP applies to all operations personnel, including Customer Service Representatives (CSRs), delivery dispatchers, data entry specialists, and seller brand managers.

2. ROLES & RESPONSIBILITIES

Access permissions vary by role. If you need a section that is not visible on your dashboard, request permissions from the system administrator.

- **Delivery Dispatcher / Operations Supervisor (e.g., Sydney):**
  - Monitors driver dashboard, order metrics, and driver performance.
  - Reviews daily delivery schedules to assign and dispatch drivers.
- **Online Customer Service Representatives (CSRs) (e.g., Sasha, Rosanna):**
  - Manages the Delivery Schedule by dragging and dropping order cards to requested dates.
  - Requests updates to shipping zones, cities, and rates based on customer locations.
- **Data Entry Specialist (e.g., Joel):**
  - Manages global website configuration (headers, footers, pages, banners, primary branding colors, and icons).
- **Seller Brand Managers (e.g., Joel, Kristen, Laura):**
  - Manage specific store settings (e.g., Do Brasil, Trending Woman, Uptrend) via their respective Seller Dashboards.
  - Create and manage coupons and discount codes for their specific brands.

3. PREREQUISITES & TOOLS REQUIRED

- **Goozone Marketplace Dashboard URL** (with personal login credentials).
- **ERP Administration Dashboard URL:** `[brandname]/admin/login` (for category and attribute creation).
- **Highlevel Platform Account:** Used instead of the dashboard's native email marketing and newsletters for superior functionality.

4. STEP-BY-STEP PROCEDURES

4.1. Monitoring Platform Analytics (Dispatcher/Supervisor)

1. Log into the Goozone Marketplace Dashboard.

2. Review the **Main Dashboard** for basic metrics: orders placed, confirmed, delivered, and top performing brands.
3. Access the **Driver Dashboard** to review driver-specific performance:
    - Select the reporting timeframe (e.g., “Last 30 Days”).
    - Compare “Completed” vs. “Incomplete” orders to flag and resolve discrepancies.
    - Check total orders delivered by driver and individual performance averages.

4.2. Order & Customer Management (CSRs & Dispatcher)

1. Navigate to the **Orders** tab and select **All Shop Orders**.
2. To view, print, or download a sales receipt, click the options next to the order and download the PDF.
3. Monitor the **Failed Orders** section to follow up with customers who had checkout issues.
4. Navigate to the **Customers** tab to view the central directory of all registered buyers.

4.3. Product, Brand, & Category Management (Data Entry/Admin)

1. Navigate to the **Products** section to see:
    - **In-house Products:** Dedicated to *Hello Kids* (the primary core store migrated during marketplace creation).
    - **Digital Products:** Digital-only items (currently inactive).
    - **Seller Products:** Physical or digital products uploaded by external sellers (e.g., Do Brasil, Uptrend, Trending Woman).
2. **Managing Categories:**
    - Go to the **Categories** tab to edit existing category names or toggle their “Featured” status.
    - *To create a brand-new category:* You cannot do this on the Marketplace Dashboard. You must log into the **ERP** at `[brandname]/admin/login` and create the category there.
3. **Managing Attributes:**
    - You can view attributes on the Marketplace Dashboard but cannot create them there.
    - *To create new attributes:* Log into the **ERP**, navigate to **Settings**, and add them there.
4. **Managing Brands:**
    - Navigate to the **Brands** tab to create or edit brand profiles directly from the dashboard.

4.4. Managing Sellers & Packages (Admin)

1. Navigate to the **Sellers** tab to view registered merchants.
    - *Note:* Sellers highlighted in **yellow** have not been fully approved yet because they have either not completed setup or have not purchased a seller package.
2. Navigate to **Seller Packages** to create subscription and registration packages for onboarded sellers.

4.5. Marketing & Coupons (CSRs/Brand Managers)

1. **Email Marketing & Newsletters:**
    - *Do not* use the native dashboard newsletter tool. It does not have the functionality we need.
    - Instead, go to the **Subscribers** tab, download the list of subscriber emails, and import them into **Highlevel** to execute email marketing campaigns.
2. **Creating Coupons:**
    - *Hello Kids Coupons:* Create these directly in the Marketplace Dashboard under **Coupons**.
    - *Other Brand Coupons (Do Brasil, Uptrend, Trending Woman):* These cannot be created from the main dashboard. Brand managers (Joel, Kristen, Laura) must log into their individual **Seller Dashboards** to create and manage their brand-specific

discount codes.

4.6. Driver Setup & Delivery Scheduling (CSRs & Sydney)

1. **Driver Management:**
   - Navigate to the **Drivers** tab to view the driver registry, toggle driver availability (on/off), and review driver payment, maintenance, or bonus histories.
2. **Scheduling Deliveries (CSR workflow):**
   - Navigate to the **Delivery Schedule** tab.
   - When an order is confirmed, drag and drop the order card into the appropriate date card requested by the customer.
3. **Dispatching Deliveries (Dispatcher/Sydney workflow):**
   - Navigate to the **Delivery Schedule** tab.
   - Select the current day to review all scheduled deliveries and assign orders to active drivers.

4.7. Shipping Settings & Zone Updates (CSRs/Data Entry)

1. **Adding New Coverage Areas:**
   - If a CSR identifies a city or country not currently supported, navigate to the **Location** tab first.
   - Add the new country, state, or city to the database.
2. **Editing Shipping Zones & Rates:**
   - Navigate to **Settings** > **Shop Settings** > **Shipping Information/Shipping Zones**.
   - Locate the relevant shipping zone and click **Edit**.
   - Add the newly created cities to the zone or adjust the shipping pricing as requested.

4.8. Website Design and Global Settings (Joel / Data Entry)

1. Navigate to **Website Setup** to manage global parameters.
2. Update the site header, footer, banners, and static pages.
3. Adjust site aesthetics under appearance settings (e.g., changing primary colors, uploading favicons, or updating brand logos).

4.9. Staff Notifications & Language Toggle

1. Navigate to the **Staff** tab to view active backend users.
2. Click on a staff member's profile to manage their email notification preferences:
   - Toggle **New Order Email** on if they need to be alerted of new transactions.
   - Toggle **New User Email** on for registrations.
3. To switch your dashboard language between English and Spanish, use the language toggle in the upper right-hand corner of the profile section.

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5. KEY WORKFLOWS & FREQUENCIES

- **Daily (CSRs):** Manage the Delivery Schedule (drag and drop order cards based on bookings).
- **Daily (Sydney/Dispatcher):** Check the Delivery Schedule for the day's orders, assign drivers, and check completed vs. incomplete order statistics.
- **As Needed (Sellers/Brand Managers):** Create coupons in respective dashboards.
- **As Needed (CSRs/Data Entry):** Update shipping zones and rates, or add new cities/locations to the database.

- **As Needed (Joel/Data Entry):** Update banners, site styling, and static pages.

6. EXPECTED OUTCOMES & DELIVERABLES

- **Clean Delivery Calendar:** Real-time, drag-and-drop schedule reflecting accurate customer delivery dates.
- **Accurate Billing & Shipping:** Shipping rates and cities updated dynamically to prevent pricing errors at checkout.
- **Synced Inventory and Categories:** Products and categories aligned with ERP settings.
- **Segregated Coupon Tracking:** Brand-specific coupons isolated to avoid unauthorized cross-store discounts.

7. ROADBLOCKS & TROUBLESHOOTING

Issue / Roadblock	Potential Cause	Action Plan / Solution
Cannot find the option to add a new product category or attribute	Marketplace Dashboard only supports editing existing category names or toggling featured status.	Log into the **ERP** admin portal (`[brandname]/admin/login`) and create the categories/attributes under ERP Settings.
Coupon code doesn't work for Do Brasil/Uptrend/Trending Woman	The coupon was mistakenly created in the Marketplace Dashboard instead of the brand-specific dashboard.	Log out of the main dashboard, log into the specific brand's Seller Dashboard, and create the coupon there.
Completed vs. Incomplete order discrepancy	Logistical issues, incorrect driver app reporting, or payment processing errors.	Sydney/Dispatcher must review the driver dashboard for the period, contact the assigned drivers, and reconcile order statuses.
A newly requested city cannot be added to a shipping zone	The city has not been created in the main location database yet.	Navigate to the **Location** tab first, create the country, state, and city, then return to **Shipping Zones** to add and price it.
Missing access permissions to certain tabs or tools	Staff roles are restricted to ensure security and task segregation.	Send a formal request to the tech support team at **admin@goozone.com** with details of your required duties.