Standard Operating Procedure (SOP): Website Navigation, Checkout, & Order Troubleshooting

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1. OBJECTIVE & SCOPE

This SOP details the customer-facing website navigation, shopping cart management, and checkout process for Goozone Marketplace.

CSRs need to know this workflow inside out. It is what lets you guide a confused customer, resolve a payment issue, troubleshoot a stock error, and verify a manual payment receipt (Paywise or bank transfer) without escalating.

2. ROLES & RESPONSIBILITIES

- **Customer Service Representatives (CSRs):**
  - Act as the primary contact for customers who experience difficulties while checking out.
  - Manually verify screenshots of Paywise or bank transfer payments before updating order status.
  - Relay website technical bugs or stock discrepancies to sellers or site administrators.
- **Sellers / Brand Managers:**
  - Responsible for maintaining accurate stock levels on their store pages to prevent “Not Enough Stock” blockages at checkout.
- **Delivery Drivers:**
  - Use the customer-provided phone numbers and shipping addresses to fulfill orders.
  - Update order statuses to “Delivered” via the driver app to complete the order lifecycle.

3. PREREQUISITES & TOOLS REQUIRED

- **Goozone Marketplace Frontend Website URL**.
- **Test Customer Account** (for CSR troubleshooting and training).
- **Driver App** (used by drivers to mark orders as delivered).

4. STEP-BY-STEP CUSTOMER JOURNEY (CSR GUIDE)

4.1. Product Browsing & Seller Store Selection

1. **General Browsing:** Customers visit the homepage, browse categories, search via the top search bar, or explore “New Arrivals”.
2. **Item Selection:** Click on a desired item and click **Add to Cart**.
3. **Visiting Individual Sellers:** On any product page, customers can click the **Visit Store** button to view the specific merchant’s storefront, reviews, and unique inventory (e.g. Do Brasil, Trending Woman).

4.2. Shopping Cart Management

1. Click the **Cart Icon** in the top header to slide open the cart panel.
2. **Modify Quantity:** Increase or decrease item quantities directly in the cart.
3. **Delete Items:** Click the **trash bin icon** next to an item to remove it.
4. Click the "X" button to close the cart drawer and continue shopping.

4.3. The Checkout Process

1. From the cart, click the checkout button to reach the secure Checkout page.
2. **Enter Shipping Information:**
    - Select **Country**, **State**, and **City** (e.g., Trinidad, Tobago, Barbados, etc.).
    - Enter **Postal Code** (or "also code") and full street address (e.g., "#56 Arouca Main Road").
    - **Phone Number:** Insist on a correct, active phone number. Without it the driver cannot reach them and we cannot call if something goes wrong.
3. **Billing vs. Shipping Address:** For corporate clients, toggle off "Billing address is the same as delivery address" and input separate billing details.
4. **Delivery Fee Selection:** The system will dynamically display delivery fees based on the selected location (e.g., Standard Delivery to Arouca is $40; Standard Delivery to Tobago is $45).

4.4. Payment Methods & Verification Workflows

Customers can choose from several payment options, each requiring a specific CSR follow-up workflow:

- **Cash on Delivery (COD):** No immediate payment verification needed. Order proceeds directly to confirmation.
- **Direct Credit/Debit Card (First Atlantic Commerce):** Customer inputs their credit card number, cardholder name, expiration month/year, and CVV. Payment is verified automatically by the gateway.
- **Paywise:**
    1. Customer selects Paywise and clicks the provided link.
    2. Customer enters the exact order amount and their name, agrees to terms, and clicks "Pay".
    3. **CSR Action:** The customer *must* take a screenshot of the completed Paywise transaction and send it to the CSR team via WhatsApp/Highlevel. Do not process the order until this screenshot is verified.
- **Bank Transfer (Republic Bank, RBC, or Scotia Bank):**
    1. Customer selects their preferred bank to reveal Goozone's specific banking details (Account Number, Account Type, Branch).
    2. Customer completes the transfer via their online banking app, takes a screenshot, and shares it with the CSR team.
    3. **CSR Action:** Cross-reference the transfer screenshot with bank notifications before moving the order to "Confirmed".

4.5. Post-Purchase Tracking & Dashboard

1. Upon order submission, the customer is redirected to a "Thank You" page stating: *"Your order has been placed and is waiting to be confirmed."*
2. Customers can log into their personal dashboard to check **Purchase History**.
3. The progress timeline will update visually as follows:
    - **Order Placed / Waiting to be Confirmed** (Default state).
    - **Processed** (Updated once CSR/Sydney verifies payment).
    - **Shipped / In Transit** (Updated when handed to the driver).

    - **Delivered** (Turns green once the delivery driver confirms drop-off via the driver app).
4. **Wish List (Favorites):** If a customer likes an item but does not have the current budget, they can click the "Wish List" (heart) icon to save it to their favorites dashboard for future checkout.
5. **Profile Customization:** Customers can navigate to their profile dashboard to update their user type (individual person vs. company), national ID, email, password, and profile image.

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5. KEY WORKFLOWS & FREQUENCIES

- **Ongoing (CSRs):** Guide customers through payment links (Paywise/Bank Transfers) and request transaction screenshots.
- **Ongoing (Drivers):** Confirm deliveries in real-time on the driver app to trigger automatic dashboard updates for customers.
- **Weekly (CSRs/Admin):** Audit the "Failed Orders" list on the dashboard and contact customers to assist with manual checkout.

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6. EXPECTED OUTCOMES & DELIVERABLES

- **Verified Payments:** Manual transactions (Paywise/Bank transfers) backed by verifiable customer screenshots before order dispatch.
- **Accurate Deliveries:** High-fidelity shipping and contact details (including valid phone numbers) on all processed receipts.
- **Transparent Tracking:** Real-time visibility for the customer regarding their order status, decreasing support tickets.

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7. ROADBLOCKS & TROUBLESHOOTING

Issue / Roadblock	Potential Cause	Action Plan / Solution
"Not Enough Stock" error when adding to cart	Seller inventory has dropped to 0 or was entered incorrectly in the database.	Inform the customer that we are checking stock. Contact the respective seller/brand manager (e.g. Joel, Kristen, Laura) and request they update their stock levels in the dashboard.
Customer selected Bank Transfer but did not receive banking info	Customer closed the checkout screen too quickly or skipped instructions.	Access the customer's order under "All Shop Orders" to verify the total. Retrieve the company bank details for their preferred bank (Republic, RBC, or Scotia) and send them manually via Highlevel.
Customer sent a Paywise receipt but checkout shows "Waiting to Confirm"	Paywise is a manual payment method; checkout status does not auto-update.	Verify the screenshot details (name, amount, date), then have Sydney or an authorized admin manually toggle the order status to "Processed" in the Marketplace Dashboard.
Delivery driver cannot locate the customer's address	Customer entered a typo, an incomplete address, or an inactive phone number.	Check the customer's order file, retrieve their phone number, and attempt to call them. If unreachable, search Highlevel for recent conversations to locate alternative contact info.