

Tao of Shop Admin User Guide

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Engage

1. Create new post

To start, go to the **ENGAGE** tab, scroll down, and click on **NEW POST**.

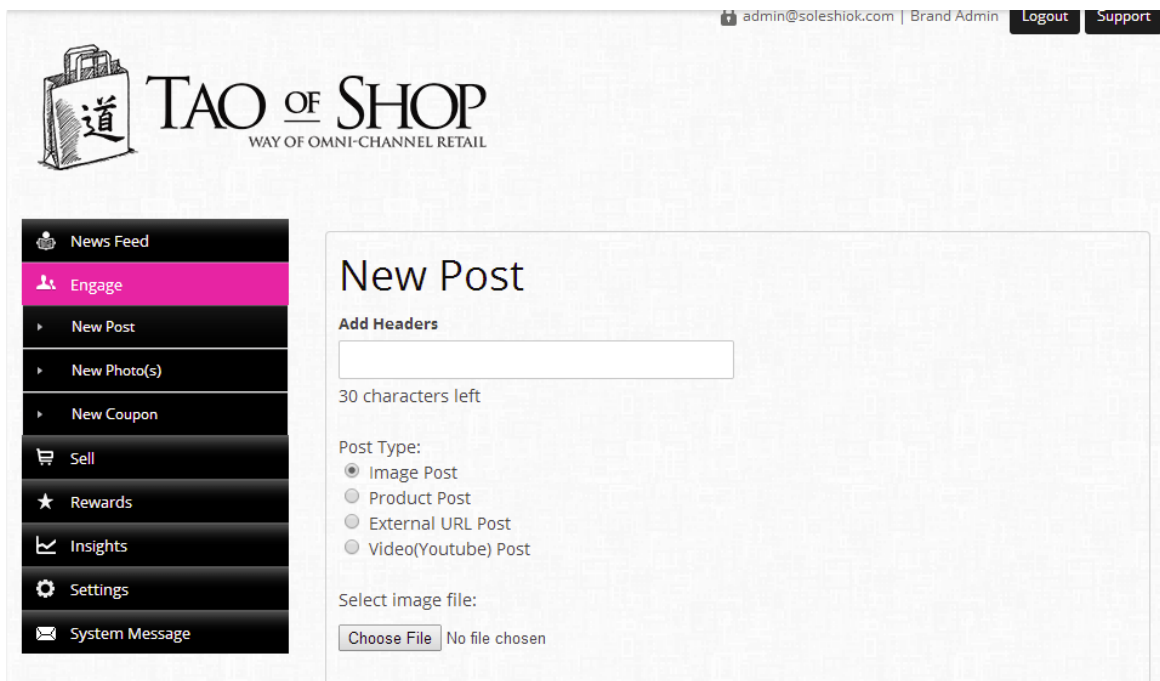
Let's start with the header. This refers to the title of the post. It is limited to a maximum of 30 characters, including spaces, so make sure you craft a header that is straight to the point.

There are 4 options available within a post; you can:

1. Attach an image file
2. Insert a product image and product link (*that links to the specific product in your Eshop*)
3. Attach an image file + external link
4. Embed a Youtube video file

These options would appear before the post description.

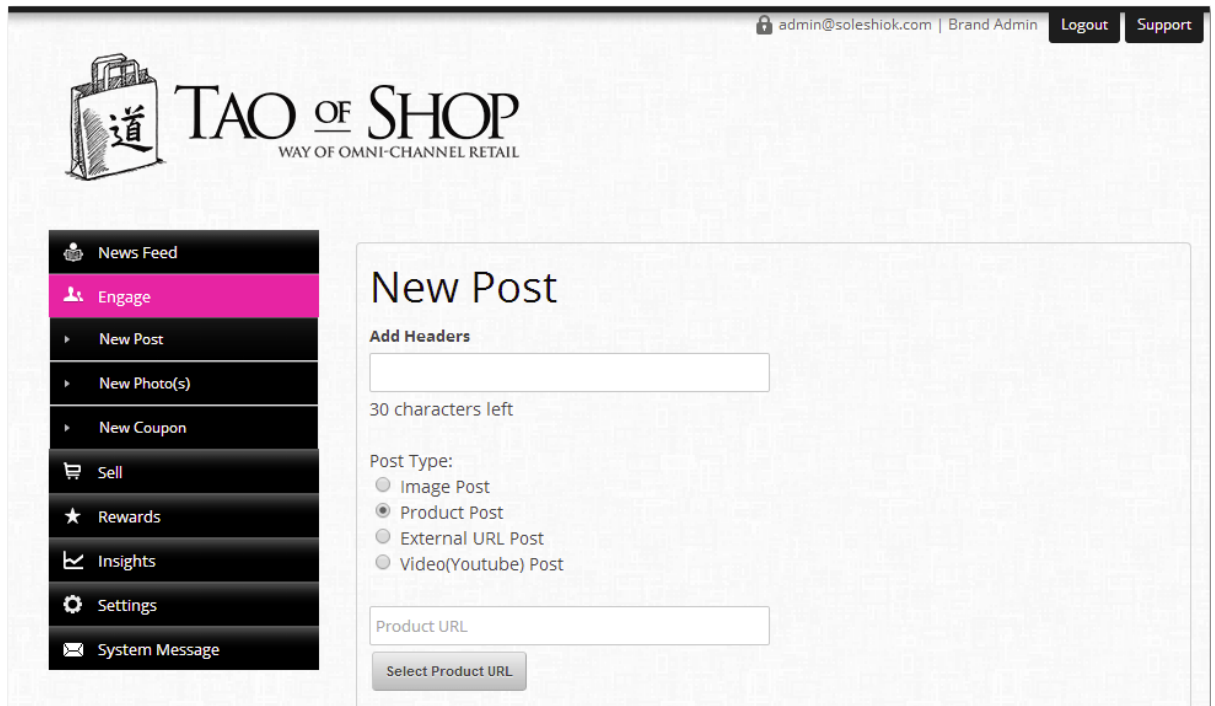
1. **IMAGE:** To attach an image, check the Image Post radio option > click on the CHOOSE FILE button. Next, select your preferred image that is saved in your computer.



The screenshot shows the 'New Post' form in the TAO OF SHOP admin interface. The top navigation bar includes the user email 'admin@soleshiok.com', the role 'Brand Admin', and 'Logout' and 'Support' buttons. The main header features the TAO OF SHOP logo and tagline 'WAY OF OMNI-CHANNEL RETAIL'. A left sidebar menu contains options: News Feed, Engage (highlighted), New Post, New Photo(s), New Coupon, Sell, Rewards, Insights, Settings, and System Message. The main content area is titled 'New Post' and includes an 'Add Headers' section with a text input field and a '30 characters left' indicator. Below this is the 'Post Type' section with four radio button options: Image Post (selected), Product Post, External URL Post, and Video(Youtube) Post. At the bottom, there is a 'Select image file:' section with a 'Choose File' button and the text 'No file chosen'.

2. **PRODUCT:** This option allows you to attach a product link within your Newsfeed content, which is great as a call-to-action. Users can now read your post, and click to go directly to the product in your Eshop. To attach a product link, check the Product Post radio

option > click on the Select PRODUCT URL button. Select from the list of products and proceed to the text description.



The screenshot shows the TAO OF SHOP admin interface. At the top right, there is a user profile for 'admin@soleshiok.com | Brand Admin' with 'Logout' and 'Support' links. The main header features the TAO OF SHOP logo and tagline 'WAY OF OMNI-CHANNEL RETAIL'. A left sidebar menu includes options like 'News Feed', 'Engage' (highlighted), 'New Post', 'New Photo(s)', 'New Coupon', 'Sell', 'Rewards', 'Insights', 'Settings', and 'System Message'. The main content area is titled 'New Post' and contains a form with the following elements: an 'Add Headers' text input field with a '30 characters left' indicator; a 'Post Type:' section with radio buttons for 'Image Post', 'Product Post' (selected), 'External URL Post', and 'Video(Youtube) Post'; and a 'Product URL' text input field with a 'Select Product URL' button below it.

3. **EXTERNAL LINK:** You would select this option if you wish to insert an external link with image within your post. Check the External URL radio option > click on the Select PRODUCT URL button. Select from the list of products and proceed to the text description.



- News Feed
- Engage
- New Post
- New Photo(s)
- New Coupon
- Sell
- Rewards
- Insights
- Settings
- System Message

New Post

Add Headers

30 characters left

Post Type:

- Image Post
- Product Post
- External URL Post
- Video(Youtube) Post

Select image file:

[Choose File](#) No file chosen

Enter External URL

4. **VIDEO:** If you plan to publish a Youtube video post, just check the VIDEO option, insert the Youtube video link and proceed to the description of your post.



- News Feed
- Engage
- New Post
- New Photo(s)
- New Coupon
- Sell
- Rewards
- Insights
- Settings
- System Message

New Post

Add Headers

30 characters left

Post Type:

- Image Post
- Product Post
- External URL Post
- Video(Youtube) Post

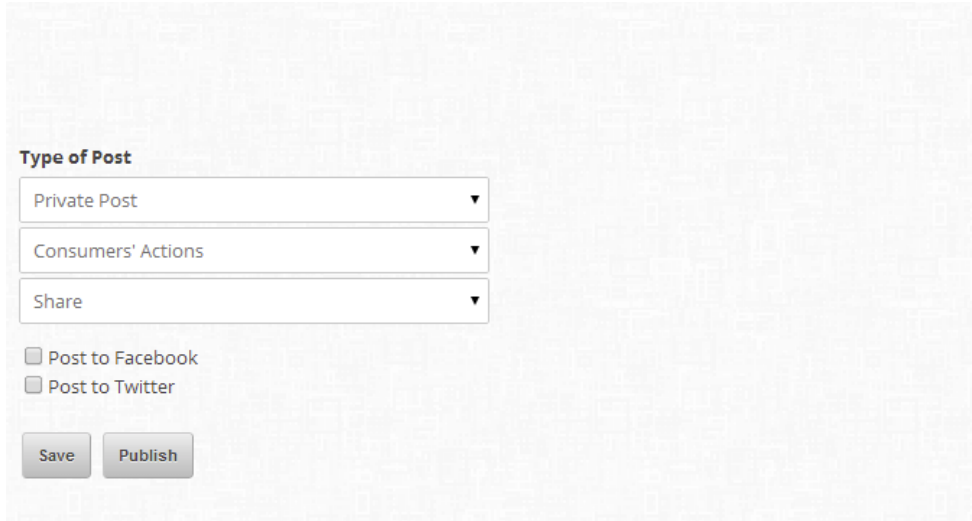
Enter Youtube URL

There is a limit of 1900 characters.

If you wish to attach a coupon to the post, select it from the dropdown list under ADD COUPON. These would be Coupons that you have pre-created.

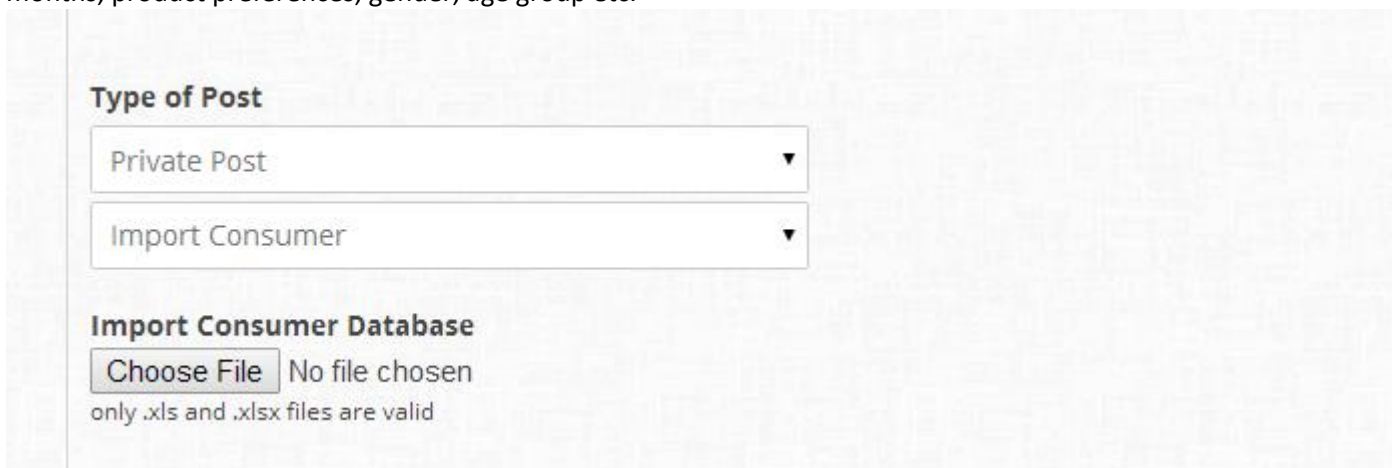
Next, let's proceed to indicate the POST TYPE, which is set at PUBLIC POST by default. If this post is meant to be seen by every member of your app, go ahead with this setting. Next, check your social media boxes if you plan to have this post published simultaneously to your Facebook and Twitter fan pages.

If not, select Private Post. You will then have the option to send this post as a private message based on your consumer's actions OR selected customer database. For example, if I want only members who have just shared a post to see this, I would then select SHARE.



The screenshot shows a form titled "Type of Post" with three dropdown menus. The first dropdown is set to "Private Post", the second to "Consumers' Actions", and the third to "Share". Below the dropdowns are two checkboxes: "Post to Facebook" and "Post to Twitter", both of which are unchecked. At the bottom of the form are two buttons: "Save" and "Publish".

You also have the option to send this out to a selected customer database by uploading the csv file here. For example, sending out promotional coupons to members based on their birthday months, product preferences, gender, age group etc.



The screenshot shows a form titled "Type of Post" with two dropdown menus. The first dropdown is set to "Private Post" and the second to "Import Consumer". Below the dropdowns is a section titled "Import Consumer Database" which includes a "Choose File" button, the text "No file chosen", and a note that "only .xls and .xlsx files are valid".

In this example, we will be publishing a PUBLIC post.

When it's been successfully published, you'll be able to see it on the top of the list here. Posts are listed based on timestamp and new posts will always appear on the top of the newsfeed.

2. Create new coupon

You can embed coupons into your public or private posts to help you drive more results than just generating buzz and views. Coupons are a strong call-to-action that helps drive traffic and sales to your eShop and physical stores.

Firstly, do note that you can't publish a coupon on its own. You will need to first create a coupon and then embed it when creating and publishing a post.

Step 1. From the side navigation panel, select **ENGAGE** and scroll down to **NEW COUPON**.



Fill in the fields, starting with the coupon title. There is a max of 35 characters. The idea is to describe the coupon as concise as possible. For example, instead of 'Massive discounts that will blow your mind!', try '20% discount in April!'

Step 2. Put the coupon description. Fill that up to a max of 300 characters.

Add Header

A short description about your coupon *

short description about your coupon? make it attractive!

Value

Type of Transaction

Num Times

Coupon for In-Store Redemptions only
 Coupon with Promo Code for Online Redemptions
 All of the above

WHEN is your coupon Valid?

Date / Time * Starts AM PM

*** Ends** AM PM

Next, update the coupon value. This refers to the discount of the coupon, which can be an absolute dollar amount or a percentage discount.

Do note that discounts are applied at the point of checkout, and applies to the whole shopping cart or transaction. You can set a minimum purchase value before the coupon is valid.

If you are planning to create coupons for free gift redemptions, simply place a "0" (zero) in the value. Do ensure that your staff is notified about these promotions, and put in place the necessary processes and inventory to facilitate the coupon redemption smoothly.

Step 3. Update transaction type. By default, this is set to a single transaction per user. If you do not want to limit that, you can always opt for 'Multiple transactions' and indicate the number of times here. This indicates the number of times the coupon can be used by the same user via the options in the list below. (in-store redemption, online redemption, or BOTH)

For example, if you indicate '1' under the number of times for BOTH in-store and online redemption, once a user has redeemed the coupon in either in-store OR online, he or she would not be able to redeem the coupon again.

Similarly, if you want your coupons to be redeemed only in-store, indicating under option 'Coupons for in-store redemption only' will allow your fans to redeem only at your outlets. Do ensure that the retail staff clicks on the "Redeem" button after scanning the coupon on the Store



Assist App. This action will confirm that the customer has used that coupon, and if you have limited the no. of redemptions, that same customer will not be able to use it again at any other outlets.

Step 4. Put expiry date. This is pretty straight forward. You will be required to fill in the Start Date/Time and End Date/Time. Click the Date field and a calendar will appear in a pop out window. To edit the dates, simply click on the date field again.

Step 5. Tag your coupon to the correct Coupon and Product category. This will give you a better overview in the Insights dashboard, on the most popular types of coupons redeemed.

Tags

Coupon Category
Product Category

>

Women's Shoes

Current Product Category is:
Women's Shoes

*assign tags to current tag
OPTIONS

WHAT'S in the fine print

Terms & Conditions

Applicable for 5 transactions per customer. All regular priced merchandise from the following brands: Born, Born Crown, Clarks, Dansko, Dr. Scholl's Collection, Dr. Weil by Orthaheel, Features, Frye, Hunter, Johnston and Murphy,

Ensure that you have a comprehensive set of Terms & Conditions to protect your brand and avoid confusion.

Submit Preview

Lastly, fill in the Terms and Conditions. With a limit of 300 characters, do make sure that your terms and conditions are crafted to fit that specific coupon. If you have a comprehensive set of terms and conditions that stretches beyond the character limitation, it would be a good practice to direct fans to the dedicated Terms and Conditions page on your website.

When completed, you may click on "PREVIEW" to preview and proof read the content. When ready, click "SUBMIT" to activate your coupon. Your customers will not see this coupon yet, it's only in the system. When you are ready for your customers to view or use it, create a post and embed it to be published.



Sole Shiok **\$20 discount coupon**

\$20 discount coupon up for grabs before 31st Dec. Hurry, get your beloved Sole Shiok shoes today!

Terms and Conditions: Applicable for 5 transactions per customer. All regular priced merchandise from the following brands: Born, Born Crown, Clarks, Dansko, Dr. Scholl's Collection, Dr. Weil by Orthaheel, Feetures, Frye, Hunter, Johnston and Murphy, Keen, Kork-Ease, K-Swiss, Mephisto, Merrell.

VALIDITY PERIOD: 1 Sep 2013 - 31 Dec 2014



TO **REDEEM** AT
OUTLETS OR ON-SITE
JUST SCAN THE **CODE**

To edit the coupon content, you can either find the coupon in “Newsfeed” on your dashboard according to the date you submitted the coupon, or simply click on ENGAGE > COUPONS, and scroll down to the coupon listing to find your desired coupon.

Any edits made after you have published the coupon, will be applied when customers click to download the coupon or view a previously downloaded coupon in the Coupon repository.

3. Edit coupon

IMPT: If you are making major changes to the coupon content, e.g. terms and conditions, redemption details, it is advisable to publish a post along with the new coupon attached so that fans that have previously downloaded the older version of the coupon are kept well in the loop.

Once created, a coupon cannot be deleted due to analytical tracking.

To edit your coupon details, go to **ENGAGE > NEW COUPON** and scroll to the bottom of the page where your list of published coupons are displayed.

Flash sale Coupon!	EDIT	DELETE
10% off online voucher	EDIT	DELETE
\$15 discount coupon	EDIT	DELETE
Free French Shoelaces	EDIT	DELETE
7% GST absorbed	EDIT	DELETE
\$12 Discount coupon	EDIT	DELETE
Noon Treats For Shoppers	EDIT	DELETE
Get \$5 off La Purla range now!	EDIT	DELETE
5% Discount Coupon!	EDIT	DELETE
Post CNY Coupon	EDIT	DELETE
Free SoleShiok Shoe Bag	EDIT	DELETE
Grand opening gifts!	EXPIRED	EDIT
5% off Online purchase	EXPIRED	EDIT
\$20 discount coupon	EDIT	DELETE

Once you've located the specific coupon, click on the **EDIT** option found on the right.

Edit Coupon

Add Header

A short description about your coupon *

short description about your coupon? make it attractive!

Value

Type of Transaction

Num Times

Coupon for In-Store Redemptions only
 Coupon with Promo Code for Online Redemptions
 All of the above

WHEN is your coupon Valid?

Date / Time * Starts * Ends

1 ▾ 00 ▾ AM PM 1 ▾ 00 ▾ AM PM

Tags

Coupon Category >

Product Category

*assign tags to current tag

OPTIONS

WHAT's in the fine print

Terms & Conditions

Ensure that you have a comprehensive set of Terms & Conditions to protect your brand and avoid confusion.

After making the changes, click **PREVIEW** to check your edits before you hit **SUBMIT**. The changes to the coupon would automatically reflect, including for members who have already downloaded the coupon prior to the edit.

4. Publishing a Private Post via Customer Import

This function is useful when you wish to update only selected groups of customers in your database. Instead of publishing the update on your brand Newsfeed (public view), you can use the option of Customer Import when settings the post as PRIVATE.

Before you start, you will need to have the customer database file downloaded and saved in your computer. You can download these files from INSIGHTS based on the type of data you require and the date range. For example, New Customers Advocates, etc.

Once downloaded, check that the files contain at least these 2 value columns with the value header intact:

- 1) ID
- 2) Email

Here are the steps:

- 1) Create the 1st part of the Post as per normal - header, image, description, coupon(if any)
- 2) Next under Post type, select 'Private Post' from the dropdown
- 3) In the next Dropdown, select 'Customer Import'
- 4) Click on **CHOOSE FILE** and attach the file required (pls see sample file attached - key columns required : id, email with value header)
- 5) Proceed to click PUBLISH



The screenshot shows a form titled 'Type of Post'. It has two dropdown menus. The first dropdown is set to 'Private Post'. The second dropdown is set to 'Import Consumer'. Below these is a section titled 'Import Consumer Database' with a 'Choose File' button and the text 'No file chosen' and 'only .xls and .xlsx files are valid'. There are two checkboxes: 'Post to Facebook' and 'Post to Twitter', both of which are unchecked. At the bottom are 'Save' and 'Publish' buttons.

Notes:

- The excel data that you download from **Insights** can be used for this purpose as long as the **ID and Email** forms part of the data in the file. The value header must be intact.
- If you have more than 1 account created from the same phone, you will receive more than 1 of the same push notification. So don't be alarmed.

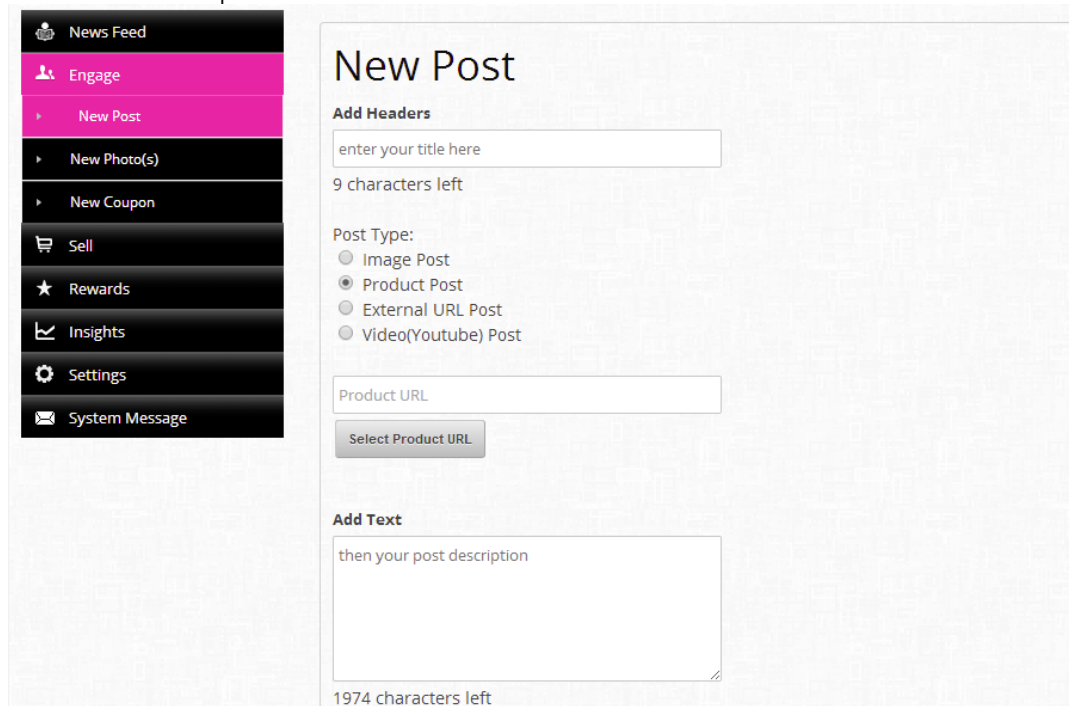
id	email
17658	bobo@gmail.com
17560	janet123@netconn.com
32142	xyz@gmail.com
254313	abc@gmail.com

5. Adding Product Links within Posts

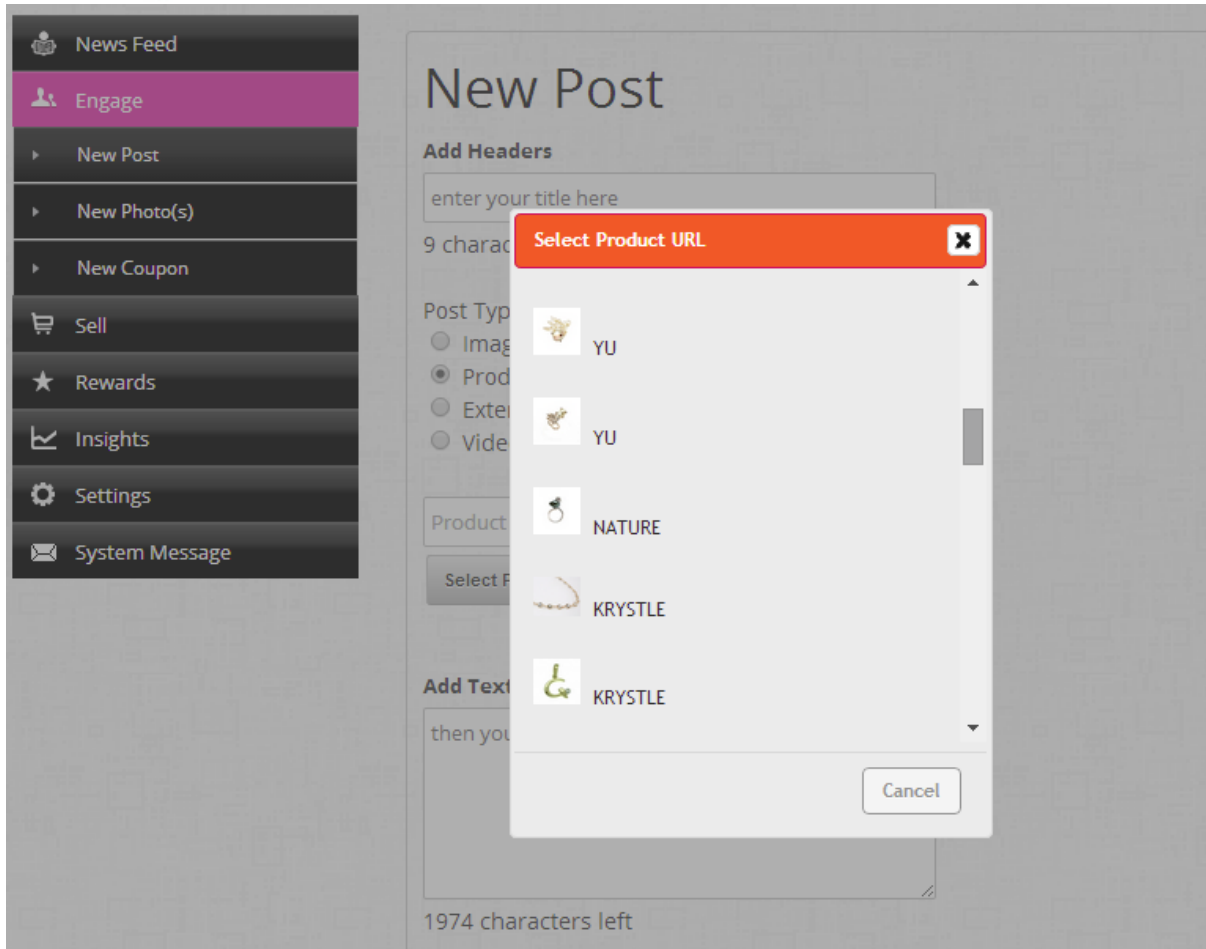
You can insert your eShop product link within a post. This is great for posts that shares news about a specific product update and features, while providing a direct call-to-action link to this product.

When consumers read something appealing about a product, they can now click to go directly to this product, and make a purchase.

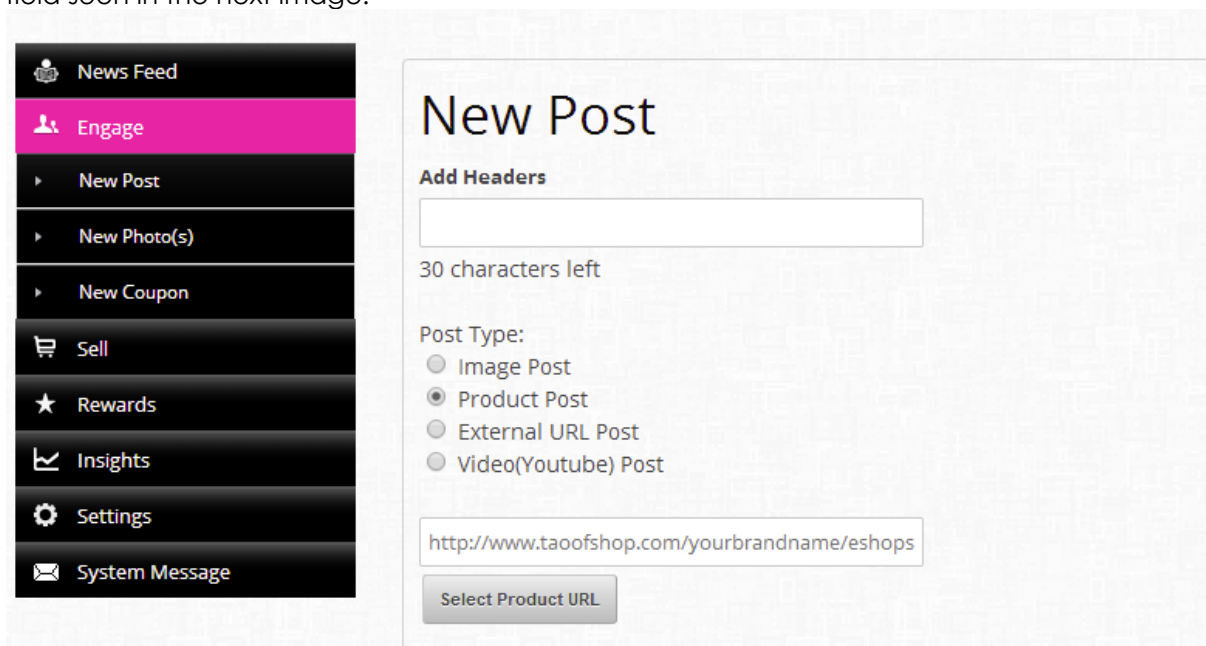
To start, go to the **ENGAGE** tab, scroll down, and click on **NEW POST**. After filling the post header (title), you will see 4 options available within a post. Select the 2nd option **Product Post**.



You can then proceed to click on the **SELECT PRODUCT URL** button which will open up a pop out window displaying the list of your eShop product titles.



Select the specific product title. This will automatically be displayed in the product link field seen in the next image.



If you change your mind about the product choice, simply click the **SELECT PRODUCT URL** option again. If not, continue with the post creation and click Publish. Here's how a sample post would appear on your newsfeed.


Fall In Love With Softspots

Wed, May 28, 2014

Fall in love with the mix of style and comfort provided by the Softspots Sophia pump.

This women's mary jane has a suede, leather or metallic leather upper; an adjustable strap ensures a snug fit.

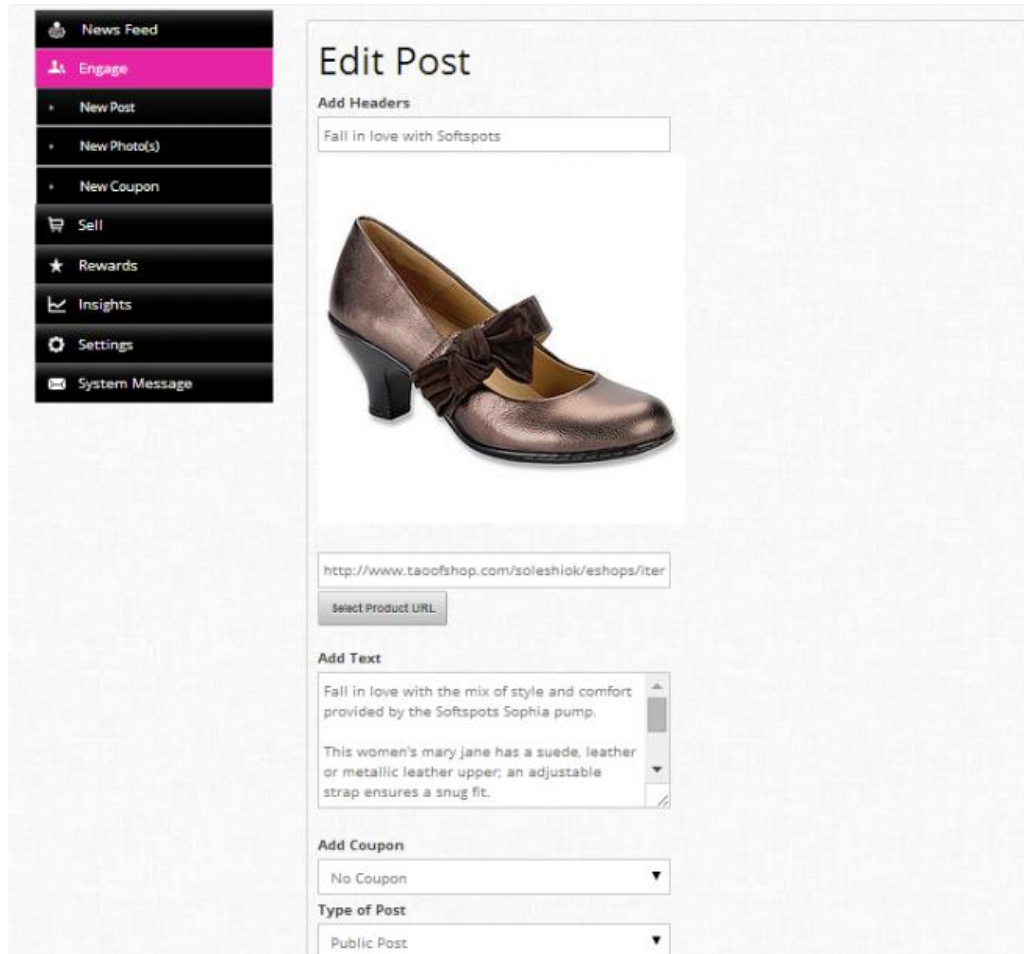
The signature Softspots Pillowtop footbed provides plush support, while the Softspots Sophia dress shoe is finished with a durable rubber sole for a stable stride.



[Go to Product Page](#)

[URL/QR Code](#) [Edit](#) [Delete](#)

Click the **EDIT** option if you wish to make any adjustments.



Sell

1. Create Product Category

If you've just started your Ecommerce module on Tao of Shop, the first thing you would need to create is the product categories and subcategories.

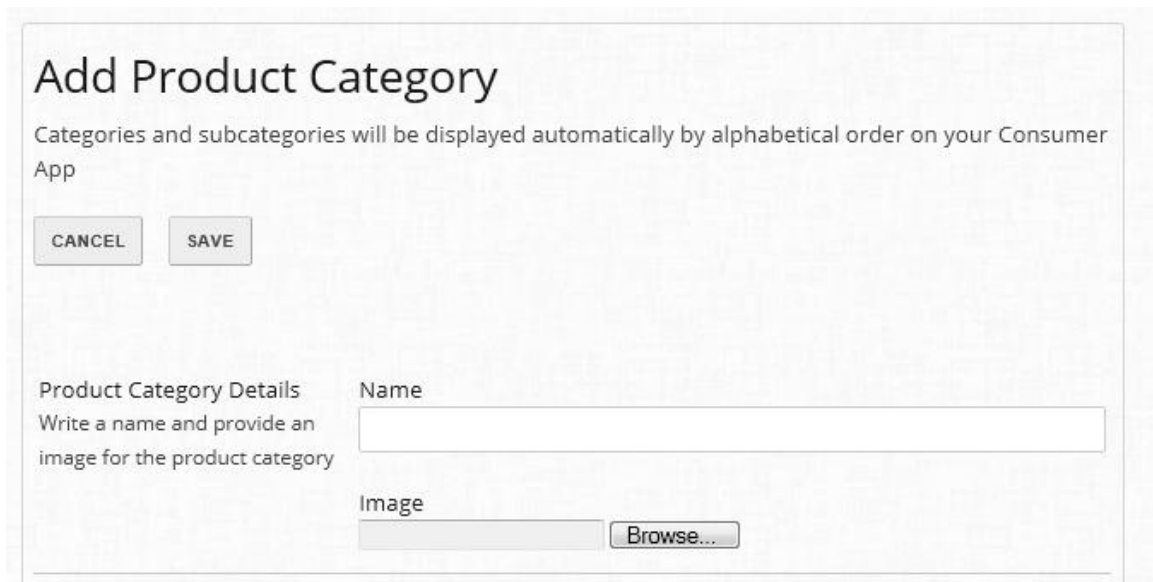
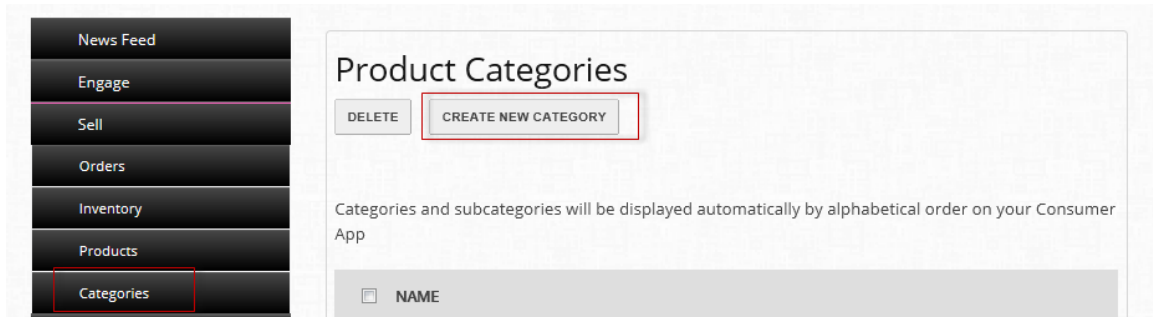
It would be ideal to list down all your categories and subcategories before you start, to boost efficiency when you start creating them in the dashboard.

Note: Created categories and subcategories will automatically be displayed in alphabetical order on your consumer app.

In Tao Of Shop, there are a minimum of 3 tiers - **Category > Subcategory > Product**. Thus, before a product can be tagged & displayed on your mobile app and consumer website, be sure that you've created both the Categories & Subcategories.

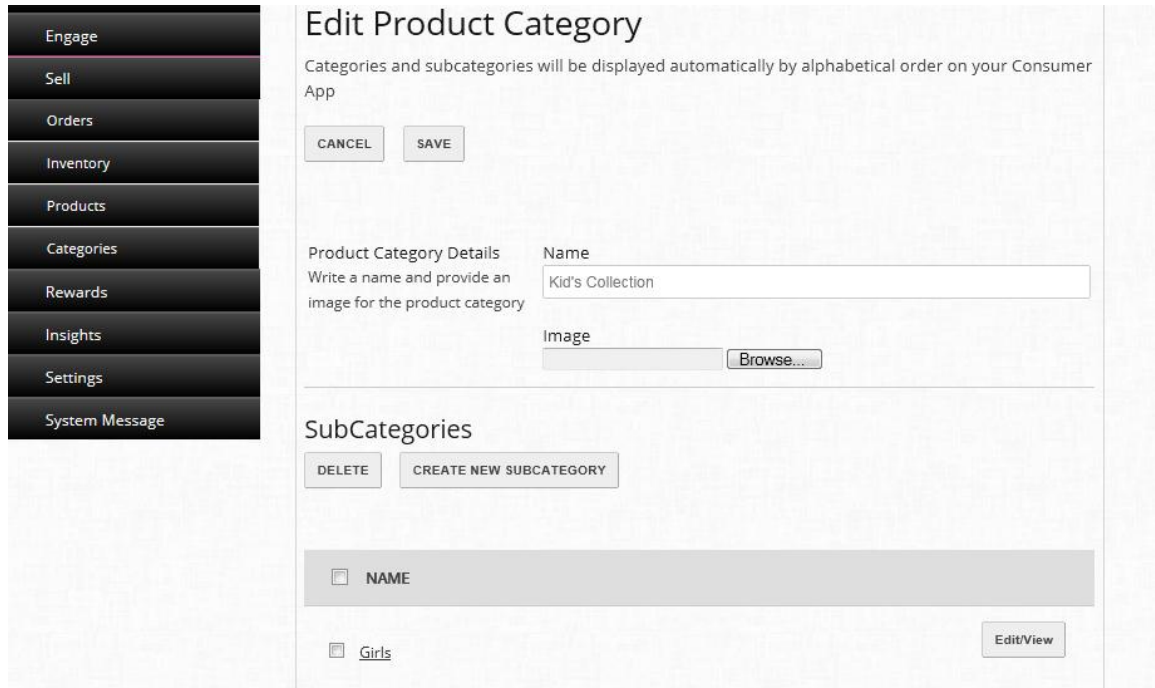
To start, select **SELL > Categories** from the admin panel.

Next, select **CREATE NEW CATEGORY**. You will be prompted to input the name and image (optional) for the new category.



Once you're done, click **SAVE**.

Subcategories are created in the same way. To start, click on **EDIT/VIEW** from the created category. This will open up the option page to add your new subcategories. Let's go with sneakers.



Engage
Sell
Orders
Inventory
Products
Categories
Rewards
Insights
Settings
System Message

Edit Product Category

Categories and subcategories will be displayed automatically by alphabetical order on your Consumer App

Product Category Details
Write a name and provide an image for the product category

Name:

Image:

SubCategories

<input type="checkbox"/>	NAME	<input type="button" value="Edit/View"/>
<input type="checkbox"/>	Girls	<input type="button" value="Edit/View"/>

Remember to hit the SAVE button.

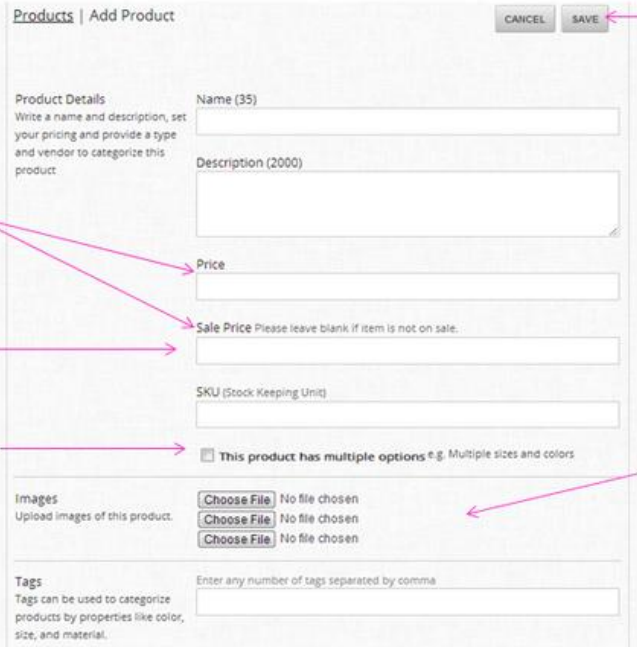
The category and subcategory names can be revised at any time via the EDIT button.

2. Upload New Products

First, go to SELL, scroll down to PRODUCTS and click ADD PRODUCT.

Type the product name and description. You'll see a dynamic character counter above the text box.

CREATE NEW PRODUCT (1)



Products | Add Product

Product Details
Write a name and description, set your pricing and provide a type and vendor to categorize this product.

Name (35)

Description (2000)

Price

Sale Price Please leave blank if item is not on sale.

SKU (Stock Keeping Unit)

This product has multiple options e.g. Multiple sizes and colors

Images
Upload images of this product.

No file chosen
 No file chosen
 No file chosen

Tags
Tags can be used to categorize products by properties like color, size, and material.

Enter any number of tags separated by comma

Always remember to hit the 'save' button

Please input numerical data only

Leave SALE field blank if there is no promotional price for this product

Check this box to add product variants

Upload a max of 3 images. You can indicate which image is to be the featured (larger) image to appear via a radio button

Next, add the price. Our prices are set at Singapore dollars by default. If there's a discounted price, go ahead and enter that under SALE PRICE. Otherwise, you can leave that blank. Do not enter ZERO as that would mean that your product is free.

Next, the SKU, which is your Stock Keeping Unit number. Fill that in and proceed to the Quantity option. If your product comes in more than one variant, for example different sizes or colours, check the box here. This opens up the page to add your variant.

You can upload one to a maximum of 3 images.

Next, we come to tags. Tags can be used to categorize products by properties like color, size, and material etc. Enter Tags separated by a comma.

Check the category boxes. You can select multiple boxes where relevant.

Check the NEW ARRIVALS box if you want to promote your new product under the New ARRIVALs page.

Under SEO, you can craft your own description. You can also click here to see what is required for each of the 3 fields. Alternatively, our system will automatically pull the product title and description once you've saved the product creation.

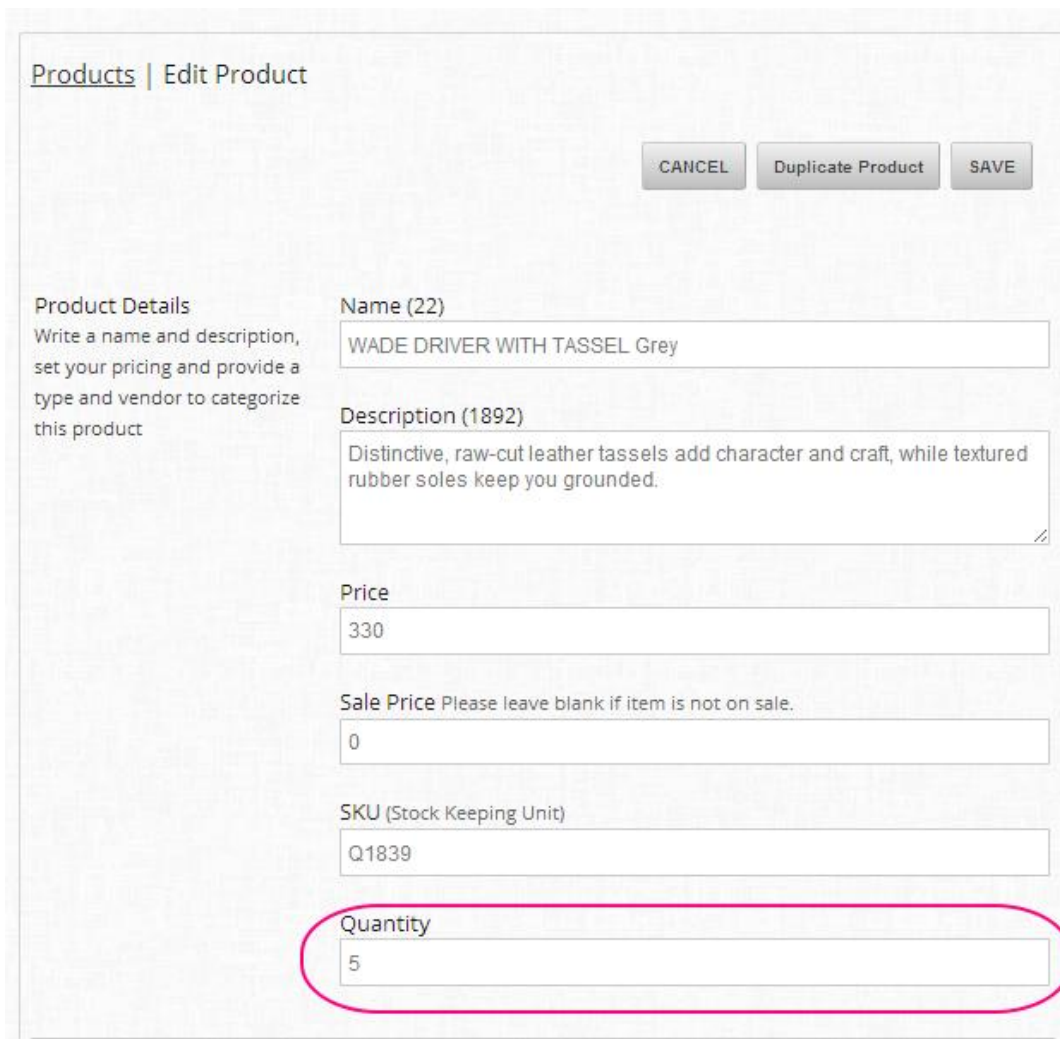
When you've checked all the fields, click SAVE. Click PRODUCTS, and you would now see the newly uploaded product here.

3. Product Variants

In the Product Creation process, there are 2 options to indicate the quantity of the product. One is the **QUANTITY** option. This is used for products that come in a single variant.

For all others, you should select the option of indicating a **product variant**. For example, if you wish to list the availability of your new winter wear in sizes, colours or material etc.

This is a sample view of a product with no variant. In this instance, you just need to enter the **QUANTITY** in the field.



[Products](#) | [Edit Product](#)

Product Details
Write a name and description, set your pricing and provide a type and vendor to categorize this product

Name (22)

Description (1892)

Price

Sale Price Please leave blank if item is not on sale.

SKU (Stock Keeping Unit)

Quantity

Note:

- Once the product is created via this option, you cannot change it to display variants. Vice versa.
- Variants are limited to 1 per product. i.e. variant groups like SIZE and COLOUR should not be created within the same product.
- Due to data tracking, created variants cannot be deleted. You can edit the variant names where necessary. For Inventory levels that reaches zero, the specific variant would not appear as an available option to your consumers.

For example, if you're uploading products of your clothing store, Product A should list SIZE - S,M,L with the corresponding quantity. Product B would be a similar product but of a different COLOUR available with SIZE as the same variant group.

Here's an example of one of our Enterprise users's website.



2-way Singlet/top (green)

Expand your wardrobe with this multi-way top, wearing it sleeveless, sleeved or cropped. The light weight jersey makes this top suited for the

SGD \$ 39.00



2-way Singlet/top (yellow)

Expand your wardrobe with this multi-way top, wearing it sleeveless, sleeved or cropped. The light weight jersey makes this top suited for the

SGD \$ 39.00



2-way Singlet/top (blue)

Expand your wardrobe with this multi-way top, wearing it sleeveless, sleeved or cropped. The light weight jersey makes this top suited for the

SGD \$ 39.00

Back to Products

2-WAY SINGLET/TOP (GREEN) SGD \$ 39.00
SKU: T001GN

Description

Expand your wardrobe with this multi-way top, wearing it sleeveless, sleeved or cropped. The light weight jersey makes this top suited for the tropical weather of Singapore.

M

1

When you

do have a product with variants, indicate that by checking the box '**THIS PRODUCT HAS MULTIPLE OPTIONS**'. You'll then see the option to select from a list of dropdown variant options.

Price

Sale Price Please leave blank if item is not on sale.

SKU (Stock Keeping Unit)

This product has multiple options e.g. Multiple sizes and colors

Select Product Options

OPTION	VARIANTS
--------	----------

SKU (Stock Keeping Unit)
Test SKU

This product has multiple options e.g. Multiple sizes and colors

Select Product Options

OPTION	VARIANTS
Size	
Select an option *****	
Title	
Size	
Color	
Material	
Style	
Date	

Create new option...	

No file chosen
 No file chosen
 No file chosen

Let's try the SIZE option. Click on SIZE and a pop out window will prompt you to enter the name of the variant type (SMALL, S, etc.) and the quantity available.

SKU (Stock Keeping Unit)

This product has multiple options e.g. Multiple sizes and colors

Select Product Options

OPTION	VARIANTS
Size	
Select an option *****	
Title	
Size	
Color	
Material	
Style	
Date	

Create new option...	

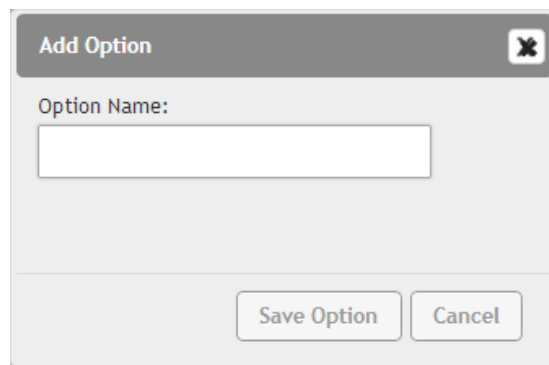
Add Variant [X]

Variant Name:

Variant Quantity:

Tags can be used to categorize products by properties like color, size, and material.

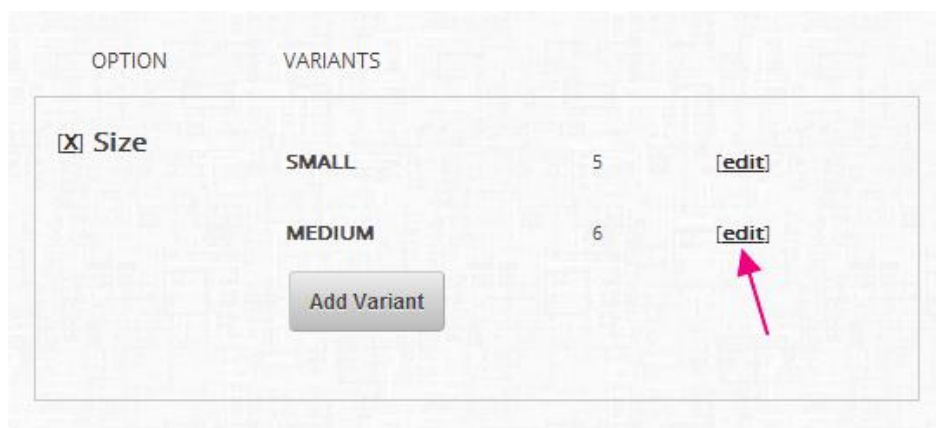
If you want to create a new option name (that's not available in the list), you can always go to the dropdown list and select **CREATE NEW OPTION**.



The image shows a dialog box titled "Add Option" with a close button (X) in the top right corner. Below the title bar, there is a label "Option Name:" followed by a text input field. At the bottom of the dialog, there are two buttons: "Save Option" and "Cancel".

Remember to click **SAVE OPTION**.

Edits can easily be made by clicking on the options next to the created variants. Make sure to check that the details are entered correctly before you exit.



OPTION	VARIANTS
<input checked="" type="checkbox"/> Size	
	SMALL 5 [edit]
	MEDIUM 6 [edit]
	Add Variant

A pink arrow points to the "[edit]" link for the MEDIUM variant.

4. Manage Orders

From the side navigation panel, go to SELL, scroll down to ORDERS. Open up the Orders page. On the left hand side, you'll find the option to filter and sort the orders. The right hand side displays the date range option, and your gross takings.

- News Feed
- Engage
- Sell
- Orders
- Inventory
- Products
- Categories
- Rewards
- Insights
- Settings
- System Message

View by Status

Select ▼

to:

Sort By

Select ▼

Gross Takings: **\$2512.00**

[Export Orders](#)

[Export Store Asst Invoice](#)

Orders

Orders Data displayed is based on a 14 - day period. Please use Date Range function to check specific data.
Jun 11, 2014 - Jun 25, 2014

ORDER	ORDER DATE	CUSTOMER NAME	ORDER STATUS	FULFILLMENT DATE	DELIVERY ADDRESS	REMARKS	TOTAL
# 76855	24/06/2014		PAID ▼	24-06-2014	Katipunan, Quezon City, Philippines 1105	Test remarks	\$5 437.40
# 76851	24/06/2014		PAID ▼	24-06-2014	Katipunan, Quezon City, Philippines 1105	This is my rema...	\$5 184.50

The default display is based on ALL ORDERS, but you can easily view by Orders status here. There's Pending, Paid, Delivered, Collected, and of course ALL ORDERS. You can also sort by Fulfillment date and Total cost. Fulfillment Date is activated for brands that require specific dates at the point of purchase. If you require this function, do let us know before your account is set up.

You'll notice that the Orders Data displayed is based on a 14 - day period. If you want to check specific data, you can always use the Date Range function here.

The EXPORT data function here allows you to easily download the data in excel format. The Order status can be adjusted under this column. For example, if your customer has just collected the items from your outlet, you can then click and select COLLECTED from the dropdown list.

View by Status

Select ▼

to:

Sort By

Select ▼

Gross Takings: **\$2512.00**

[Export Orders](#)

[Export Store Asst Invoice](#)

Orders

Orders Data displayed is based on a 14 - day period. Please use Date Range function to check specific data.
Jun 11, 2014 - Jun 25, 2014



Now if you want to check the specific order details, just click on the Order number link. You can see the date of order, product details, and customer's details and if your customers have left a comment, you can see that under Remarks.

ORDER	ORDER DATE	CUSTOMER NAME	ORDER STATUS	FULFILLMENT DATE	DELIVERY ADDRESS	REMARKS	TOTAL
# 76376	20/06/2014	TrialUser	PENDING	20-06-2014	123 Queens Lane, Singapore 1322332	I have a \$12 di...	S\$ 310.00
# 76373	20/06/2014	TrialUser	PAID	20-06-2014	123 Queens Lane, Singapore 1322332	Please call bef...	S\$ 549.00

BACK June 20, 2014 04:31 AM

Order #76378

Product	Variant	SKU	Price	Quantity	Total
Softspots Sophia	Kids stretchable (4-7)	SS124	S\$205.00	1	S\$205.00

Shipping (Standard Shipping):	S\$0.00
Discount:	S\$2.00
Tax:	S\$0.00
Total:	S\$203.00

Customer Name: **TrialUser**
Email Address: **Trial@taoofshop.com**
Telephone number: **Billing No: 91384938/64430284 ; Shipping No: 91384938/62039384**

Shipping Address:	Billing Address:
Name: TrialUser	Name: TrialUser
Address 1: Pines Ave	Address 1: 123 Queens Lane
Address 2:	Address 2:

Once you're ready to exit, just click the BACK button here.

5. Manage Inventory

A couple of things you can do here to help zoom in to selected groups of products in your inventory.

- 1) You can do a product search by keying the name in the search field here.
- 2) Or filter according to AVAILABILITY
- 3) Or sort according to the SKU, Product name or Quantity

The screenshot shows the 'Inventory' management interface. On the left is a sidebar menu with options: News Feed, Engage, Sell, Orders, Inventory (highlighted), Products, Categories, Rewards, Insights, Settings, and System Message. The main content area is titled 'Inventory' and includes a 'DELETE' button, a search input field, a 'Search' button, a 'Filter:' dropdown menu, and a 'Sort:' dropdown menu. Below this is a table of product variants:

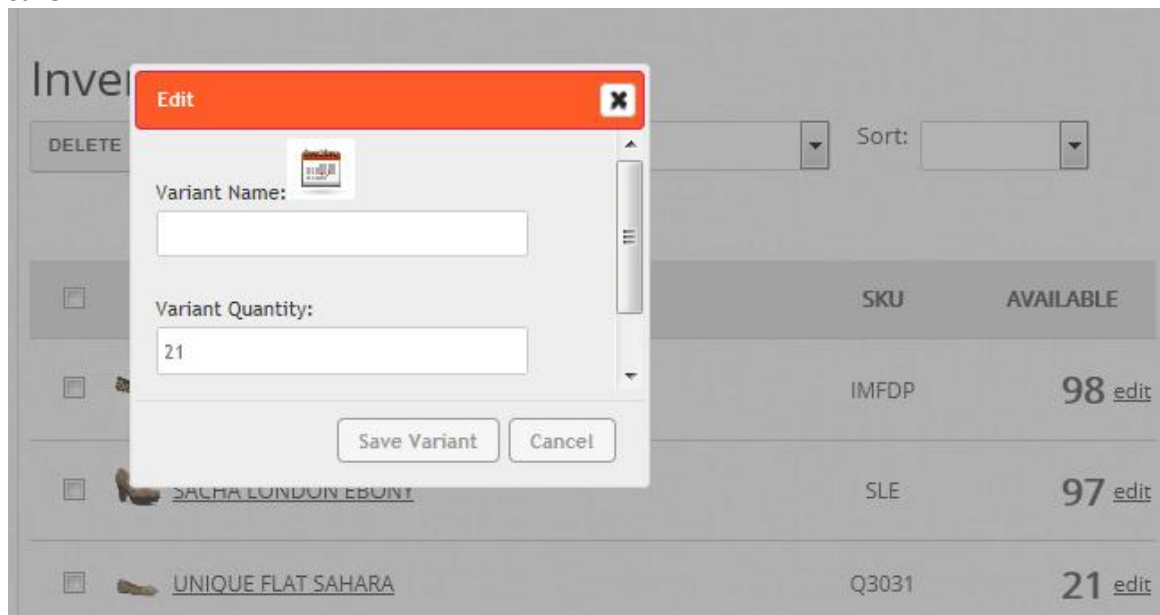
<input type="checkbox"/>	PRODUCT VARIANT	SKU	AVAILABLE
<input type="checkbox"/>	CALIE - 10	Calie	8 edit
<input type="checkbox"/>	CALIE - 9	Calie	5 edit
<input type="checkbox"/>	CALIE - 8	Calie	5 edit
<input type="checkbox"/>	CALIE - 7	Calie	5 edit

What if you can't recall the full name? It doesn't matter, coz you can just key in a couple of letters, and the backend will do the rest. Let's try the Sahara example again. I'll clear the search word, key in 'SA', and there it is.

This screenshot shows the 'Inventory' page with the search input field containing 'sa'. The search results are displayed in a table:

<input type="checkbox"/>	PRODUCT VARIANT	SKU	AVAILABLE
<input type="checkbox"/>	ISAAC MIZRAHI FLATS - DOGGY PRINTS	IMFDP	98 edit
<input type="checkbox"/>	SACHA LONDON EBONY	SLE	97 edit
<input type="checkbox"/>	UNIQUE FLAT SAHARA	Q3031	21 edit

If you just want to edit the inventory level, just click on EDIT here. You can ignore the variant name here since we're not going to make any changes to this. Change the Variant Quantity, and save.



The new quantity will reflect immediately and you're good to proceed with the rest of the products.

If you wish to make adjustment to the product details, like name, description, etc., just click on the product link to open up the specific product page.

Remember to hit SAVE when you're done.

Reward

1. Create Redemption Items

Go to REWARDS and select REDEMPTION.

You will be able to set:

- 1) Expiry date of the redemption items,
- 2) Image of product (which is for internal reference)
- 3) Name of the redemption item
- 4) Points required to redeem
- 5) Quantity of the item you have for redemption. (Once the cap is reached, the user will not be able to redeem any more of this product. This quantity can be adjusted by the Admin at any time)

- News Feed
- Engage
- Sell
- Rewards
- Advocacy Points
- Seniority
- Redemption
- Insights
- Settings
- System Message

Redemption Items

Image Path

Status

Visible

Hidden

Fill in the fields and click Publish.

Once your Redemption items are successfully published, you will see the list of items when you scroll down the page, as seen in the example below. Once the item is past its expiry date, it would be indicated as INACTIVE under the status tab and your members will not see this as part of the list of redemption items.

Redemption Items					10 items
					Sort by: Score Events Action
Name	Points	Quantity	Expiry	Status	
X <input type="button" value="Mystery gift"/>	1	50	27/02/2014	INACTIVE	
X <input type="button" value="Fratelli Rossiti shoe polish set"/>	20	1000	31/12/2014	ACTIVE	
X <input type="button" value="Crossband multi coloured shoe laces"/>	10	100	28/11/2014	ACTIVE	

Clicking on the X icon will delete your entry.

To make adjustments to your Redemption item, click on the title instead. This opens up the entry which you can then proceed with making the edits. Once ready, click PUBLISH.

Engage

Sell

Rewards

Advocacy Points

Seniority

Redemption

Insights


Settings

System Message

Edit Redemption

28/11/2014

Image Path



Delete Image

Crossband multi coloured shoe laces

Status

Visible

Hidden

Now that you have set up your Redemption list, be sure to create a new post and announce that to your members via the Newsfeed!

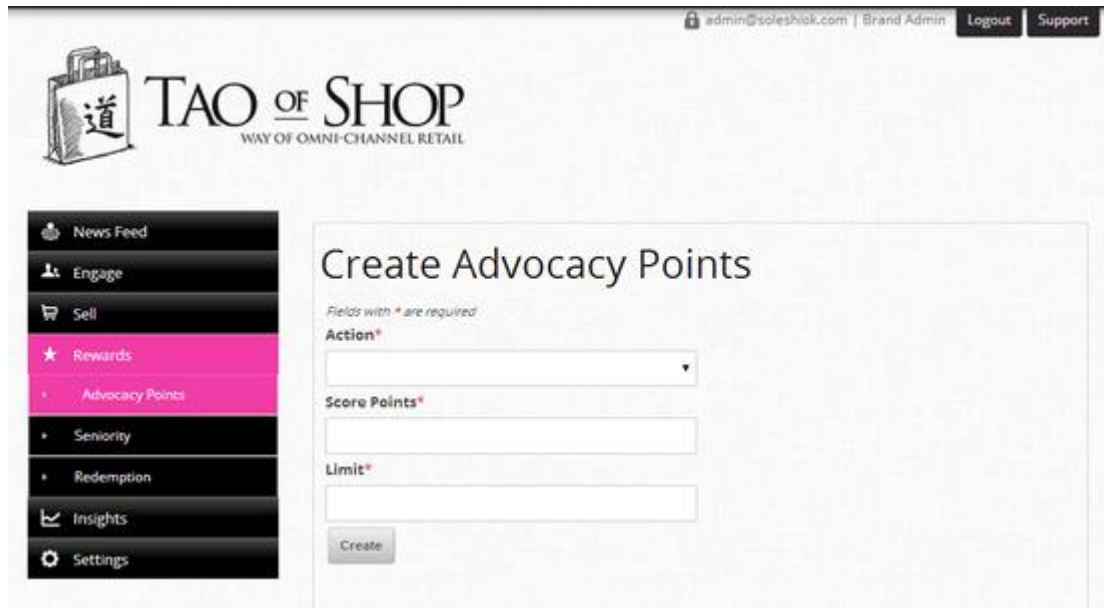
2. Create Advocacy Points

This is great for encouraging members to share their love for your brand as well as to reward them for being a fan.

To begin, click on Rewards and scroll down to Advocacy Points.

The list of actions is:

- Registration
- Share
- Checkin
- Location checkin
- Manual checkin



Select the action from the drop-down list and indicate the Score points (the number of points awarded for this action) and limit.

The limit is a cap on the total actions per day by each member). For example, if you want to award 100 points for each check-in, and limit that to 2 times a day for each member (in case they start walking in and out for your outlets repeatedly for no rhyme or reason!), indicate '2' in the limit field.



Click on 'Create' and you'll be able to see your newly created Advocacy action in the list below.

Advocacy Points

Advocacy Points

6 items

	Action	Score Points	Limit
X	Purchase	10	10
X	Share	2	10
X	Check in	3	10
X	Manual Check in	10	10
X	Location Based	1	10
X	Registration	10	1

To edit your points or change the limit setting, click on the action and make your edits. Remember to save your edits!

While Rewards points can be changed at any time via the dashboard, it is advisable to finalise the Rewards Points system with your marketing team before you launch the loyalty program. If the points are changed in the course of the program, it will in turn affect the points previously collected by your members, which may result in confusion.

3. Create Seniority Badges

As the reward points accumulate, you would want members to have a sense of differentiation. Having a seniority badge does just that.

Seniority points displayed on your member's virtual card is cumulative and a reflection of the total points they have gathered from the time they register to your app.

This is separate from the redemption points available for your members to redeem for gifts.

To create your Seniority badges, click on **Rewards > Seniority**



TAO OF SHOP
WAY OF OMNI-CHANNEL RETAIL

- News Feed
- Engage
- Sell
- Rewards**
- Advocacy Points
- Seniority
- Redemption
- Insights
- Settings
- System Message

Create Seniority Badges

*Fields with * are required*

Seniority Badge Name*

Score*

Create

- Name your badges (this should be something that is easy to understand and for your members to identify with. If you could relate that to your brand, better still!)
- Indicate the Score (this is the total points required to reach this seniority status)

Click 'Create' and you should be able to view your newly created badges like the example below:

Seniority Badges

Seniority Badges

4 items

Sort by: [Seniority Badge Name](#) [Points](#)

	Seniority Badge Name	Points
X	Gold	30
X	Silver	15
X	Bronze	5
X	Newcomer	0

To make any edits, click on the desired badge name and proceed with your changes. Remember to save your edits!

As with Reward Points, while you can edit it at any time, it is recommended to finalise the points before you announce your program to the members.

4. Create Seniority Badges

To start, click on **Rewards > Seniority**

To make any changes, click on the desired badge name and proceed with your changes.

Seniority Badges

Seniority Badges

4 items

Sort by: [Seniority Badge Name](#) [Points](#)

	Seniority Badge Name	Points
<input checked="" type="checkbox"/>	Gold	30
<input type="checkbox"/>	Silver	15
<input type="checkbox"/>	Bronze	5
<input type="checkbox"/>	Newcomer	0

You can change the

- badge name
- points allocated

Remember to **SAVE** your edits!

Insights

Using customer insights and data to personalize marketing and sales is key as there is no one-size-fit-all strategy. Rather than shooting in the dark, gain valuable insights from your data to develop campaigns that are well-targeted to your customers' interest.

When you log into the Dashboard, go to **INSIGHTS > ONLINE**. You'll see the options to see the data for **OVERVIEW, WHO, WHAT, WHERE**.



- News Feed
- Engage
- Sell
- Rewards
- Insights
- Online
- Settings

- Overview
- Who
- What
- Where

Filter: All from to to Update

7% GST absorbed

SoleShiok

drawing near and we are absorbing GST for this month's
miss out on this special promotion.

Conditions:
codes, coupon codes and gift certificates may not be used on
previous orders and may not be redeemed for cash. Some discounts may only be
applied to sale-priced items (regular-priced items may be excluded). Refer to the
terms and conditions of each offer for specific information.

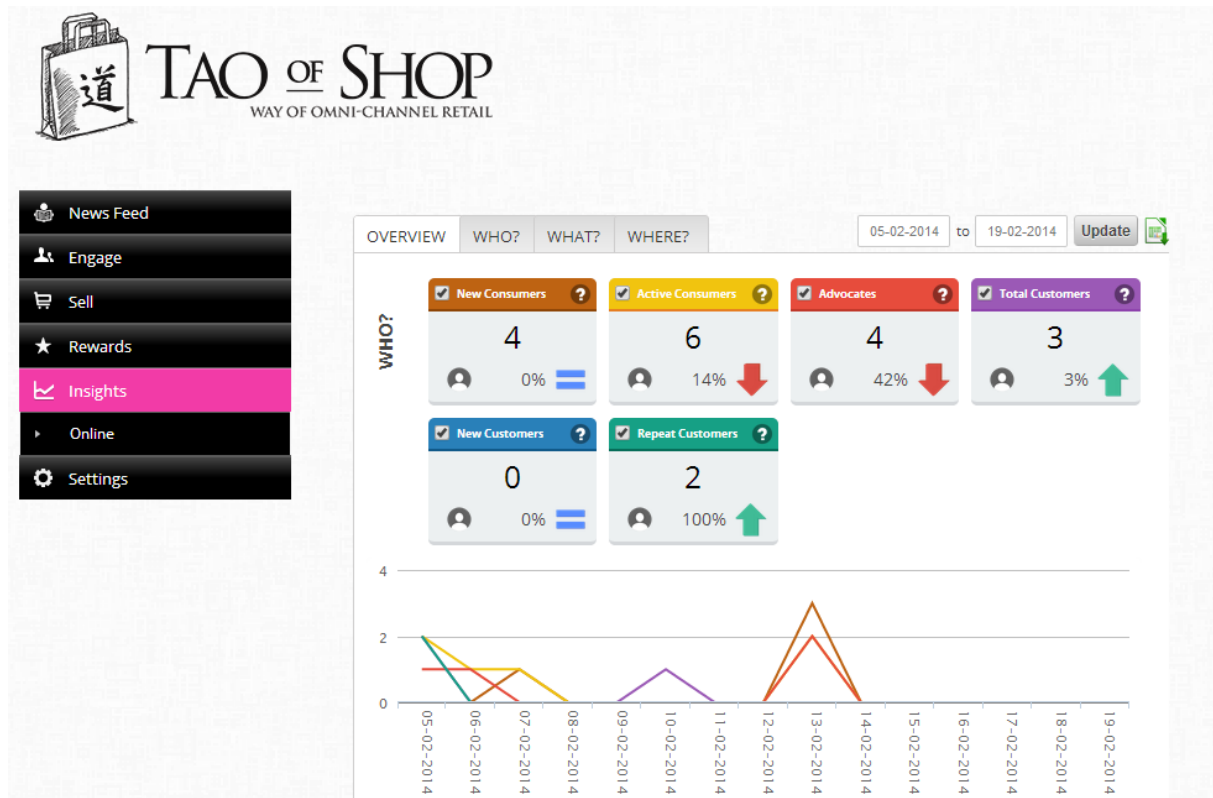
VALIDITY: 01 Nov 2014 - 31 Dec 2014

**TO REDEEM AT OUTLETS
OR ON SITE**

In this article, we will be talking about **OVERVIEW** in more detail.

OVERVIEW is a summation of :

1. **WHO** your customers are
2. **WHAT** they are viewing, downloading and buying
3. **WHERE** the touch points are



On the **OVERVIEW** page, you can download consolidated data files in csv format by clicking the green **EXCEL** icon on the top right hand corner. You can of course, indicate the date range of the data you wish to view, or use the default current 14 day range. Once downloaded, you'll see the following details in the screenshot sample below.

In the first sheet tab, you will see the data for **WHO**, displaying in respective columns

- Date
- New Consumers
- Active Consumers
- Advocates
- Total Customers
- New Customers
- Repeat Customers



	A	B	C	D	E	F	G
1	Date	New Consumers	Active Consumers	Advocates	Total Customers	New Customers	Repeat Customers
2	24-09-2013	10	22	11	55	11	2
3	25-09-2013	1	2	22	36	13	21
4	26-09-2013	3	3	32	12	0	12
5	27-09-2013	1	1	42	0	1	0
6	28-09-2013	25	1	25	9	3	33
7	29-09-2013	33	3	4	3	22	1
8	30-09-2013	1	32	2	1	2	0
9	01-10-2013	0	0	32	1	33	2
10	02-10-2013	2	2	2	2	2	2
11	03-10-2013	13	1	21	0	21	23
12	04-10-2013	32	0	34	12	2	12
13	05-10-2013	1	1	43	33	21	3
14	06-10-2013	25	2	10	1	23	55
15	07-10-2013	22	22	10	4	4	4
16	08-10-2013	25	24	25	8	8	22
17	09-10-2013	4	4	42	1	1	24
18	10-10-2013	1	1	11	3	2	25
19	11-10-2013	23	0	33	1	21	4
20	12-10-2013	25	0	22	25	23	11
21	13-10-2013	53	1	56	5	4	32
22	14-10-2013	6	3	21	1	23	2
23	15-10-2013	3	23	10	3	3	32
24	16-10-2013	24	12	21	4	4	23
25	17-10-2013	4	12	13	3	9	6

Under **WHAT**, you can find the following data :

- Date
- Views
- Shares
- Leads
- Conversion
- Advocacy
- Sales

	A	B	C	D	E	F	G
1	Date	Views	Shares	Leads	Conversion	Advocacy	Sales
2	24-09-2013	12	23	54	23	21	37
3	25-09-2013	13	23	41	23	33	42
4	26-09-2013	15	12	17	54	19	44
5	27-09-2013	42	13	3	41	9	12
6	28-09-2013	44	15	37	17	22	32
7	29-09-2013	42	42	17	3	33	4
8	30-09-2013	44	44	32	42	32	21
9	01-10-2013	55	42	1	44	13	3
10	02-10-2013	13	44	22	55	12	21
11	03-10-2013	42	55	37	12	13	37
12	04-10-2013	75	13	17	13	15	17
13	05-10-2013	88	55	32	20	65	143
14	06-10-2013	78	66	55	34	77	123
15	07-10-2013	99	85	56	45	85	312
16	08-10-2013	101	90	70	61	90	245
17	09-10-2013	44	17	15	19	19	44
18	10-10-2013	55	54	13	21	20	12
19	11-10-2013	44	41	42	22	21	34
20	12-10-2013	55	37	75	1	21	2
21	13-10-2013	10	17	1	37	22	22
22	14-10-2013	42	32	19	17	22	41
23	15-10-2013	44	4	19	32	22	17
24	16-10-2013	33	32	19	0	24	32
25	17-10-2013	22	12	12	33	24	4

And in the third sheet tab, you'll find the data related to **WHERE** :

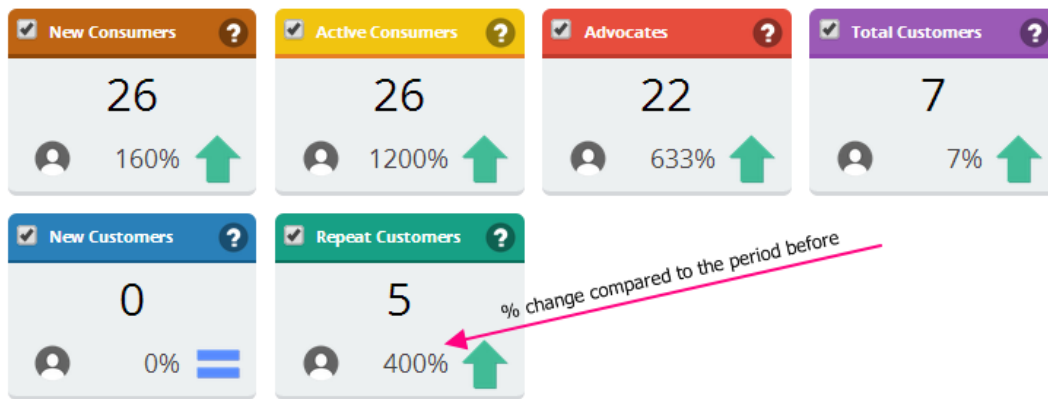
- Date
- All Channels
- Website
- Mobile App
- Mobile Web
- Facebook
- Twitter

All Channels would be a summation of the data from the rest of the columns.

If you wish to download specific data, click on the **round 'human' icon** under each segment instead. For example, under the **OVERVIEW > New Consumers** segment, clicking on the round icon next to the % data will automatically download the data pertaining specifically to **New Consumers**.

Remember to select the correct Date Range first and click UPDATE. However, when you navigate between the different segments and wish to view data based on the previous stated date range, you need not indicate that in the date fields again.

Notice the % value and arrow icon in each table segment? This is an indication of the changes in number based on a comparison with the previous date range. The direction of the arrow would correspond with a negative or positive value of the % change.



For example, if your date range is 10-20th Jan, the % change would be calculated based on previous date range of 1-10th Jan.

This provides your marketing team an excellent insight to past and current acquisition and sales performance, especially during promotional peaks, usually seen during new product launches or festive sales etc.