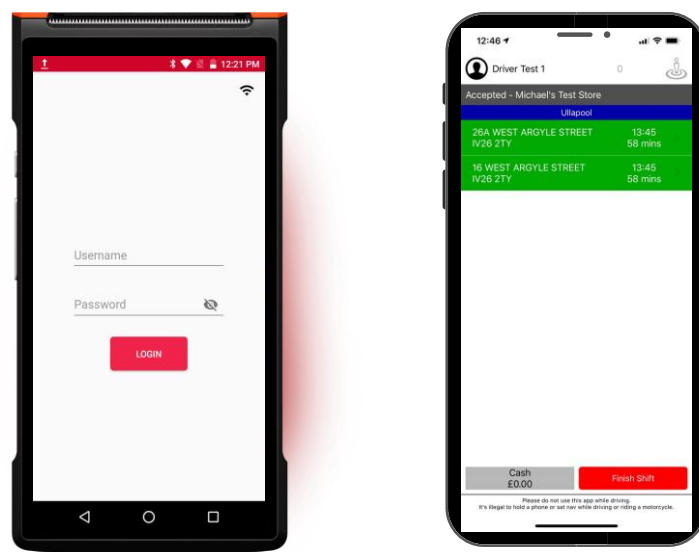


snappyshopper

Local store to door

In-Store Tablet & Driver App Guide



Version 8.6.0

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Section 1 – How to Login to the Tablet

When the tablet is powered on you should be presented with the login box (See Fig 1.1.2). See Fig 1.1.1 if the login box does not appear.

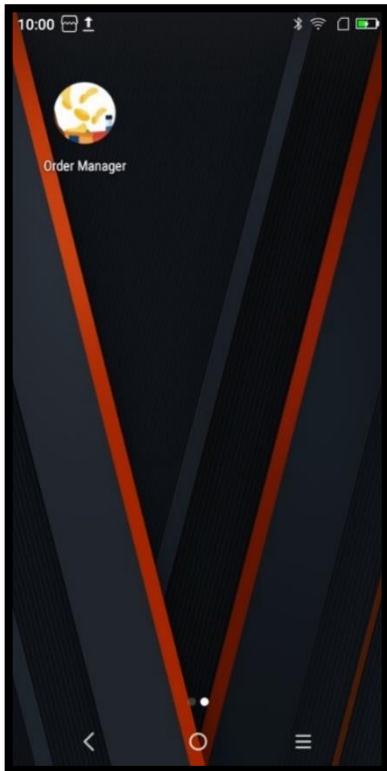


Fig 1.1.1

Click on the **“Order Manager”** App on the Tablet home screen. If the Icon is not visible, swipe left or right on the home screen as it may be on another page of the home screen.

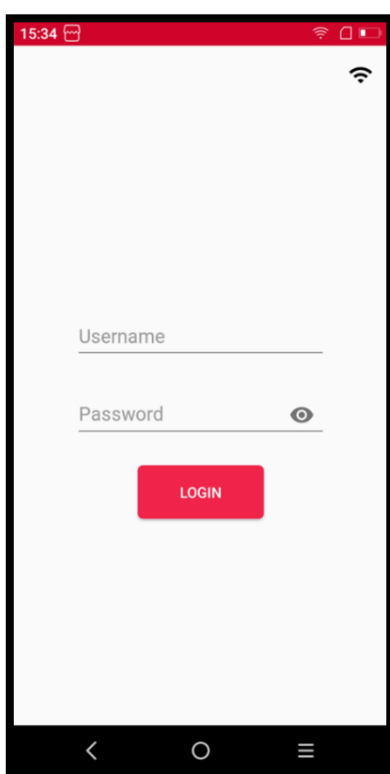


Fig 1.1.2

Enter the login details into the **“username”** field and then the password into the **“Password”** field and then select **“Login”**.

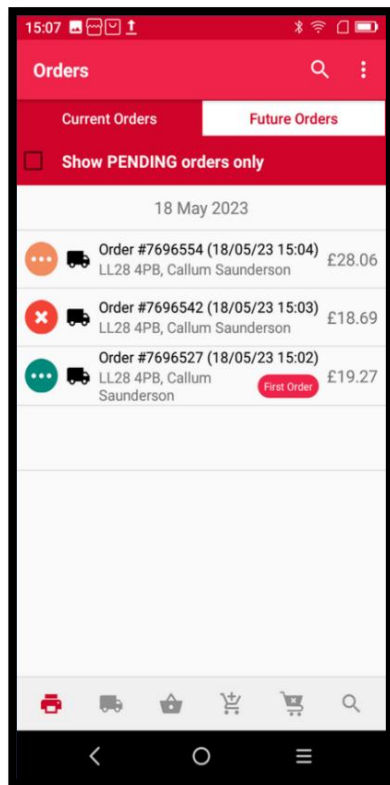


Fig 1.1.3

You should then be presented with a screen like this once Orders have been received.

- This orange symbol means the order is pending.
- This red symbol means the order has been declined.
- This green symbol means the order has been accepted.

Section 2 – Receiving & Accepting an Order

The section below will outline how to accept a Pending Order.

2.1 – Accepting an Order

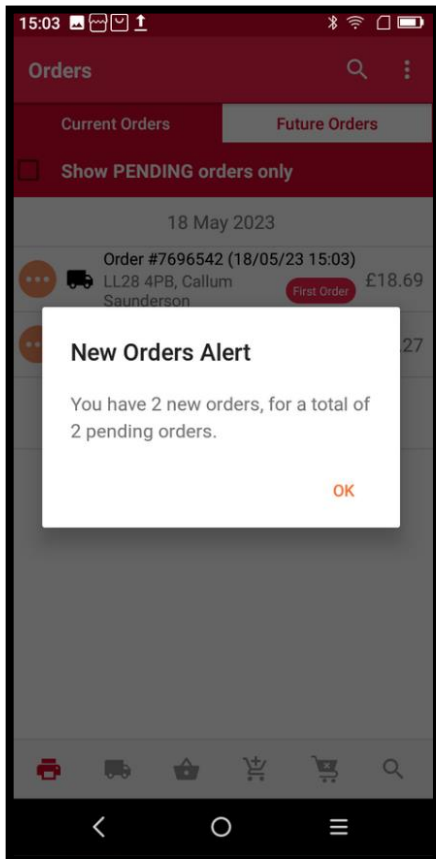


Fig 2.1.1

A **“New Orders Alert”** message will show when there is a new order detailing how many orders are new and pending.

Press **“OK”** to this message.

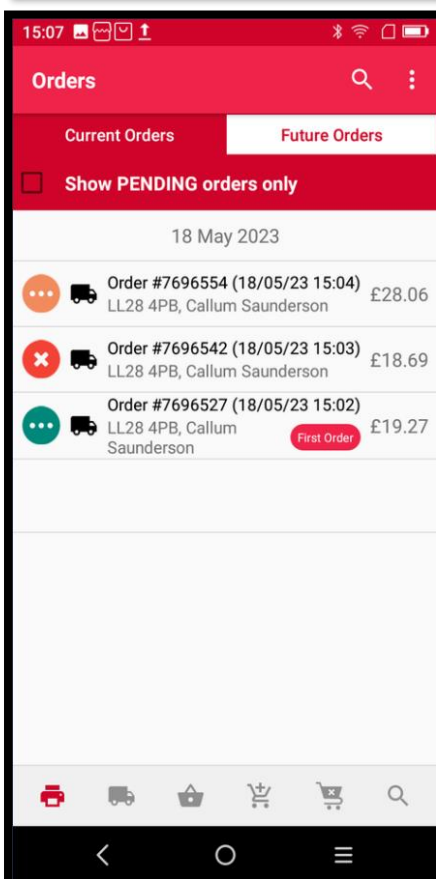


Fig 2.1.2

The **“Current Orders”** menu shows:

- Order Reference Number.
- Order Status.
- Current Date.
- Order Value.
- A **“First Order”** label to identify first time customers.

Press on the order to get more details.

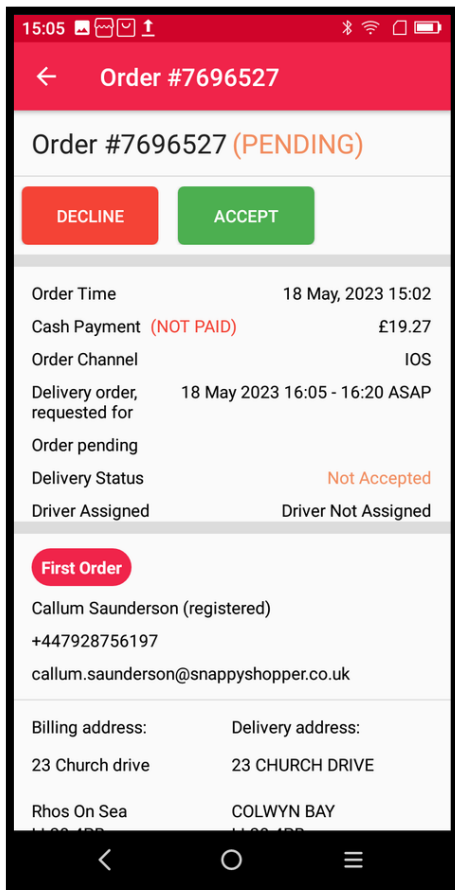


Fig 2.1.3

Click on the Pending Order.

You will have the option to **“Decline”** or **“Accept”** the Pending Order.

This screen will also give you details of the customer delivery address, contact details and whether it is a cash or card payment.

Press **“Accept”** at this point.

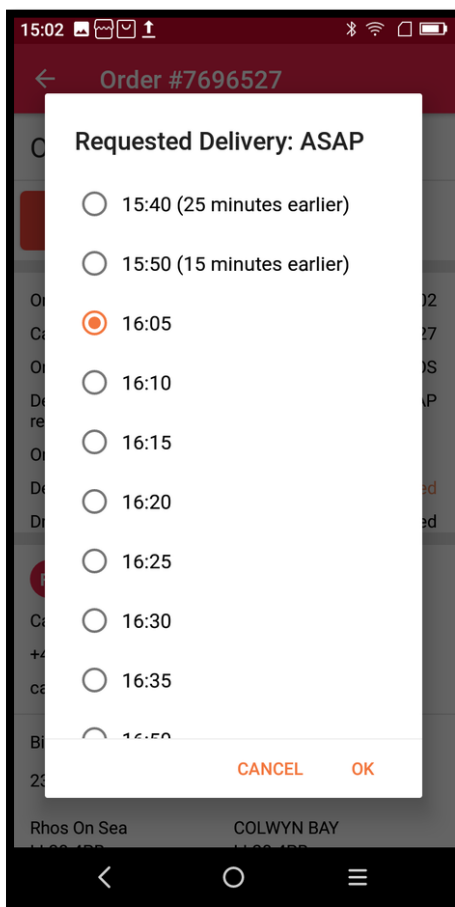


Fig 2.1.4 - Timeslots

Once you click on **“Accept”**, you will be presented with the Delivery timeslots. The customers requested time slot will be pre-selected.

NOTES:

- Please try and manage the customer expectations as much as possible.
- Once a timeslot has been selected, the customer will receive an email and phone notification.

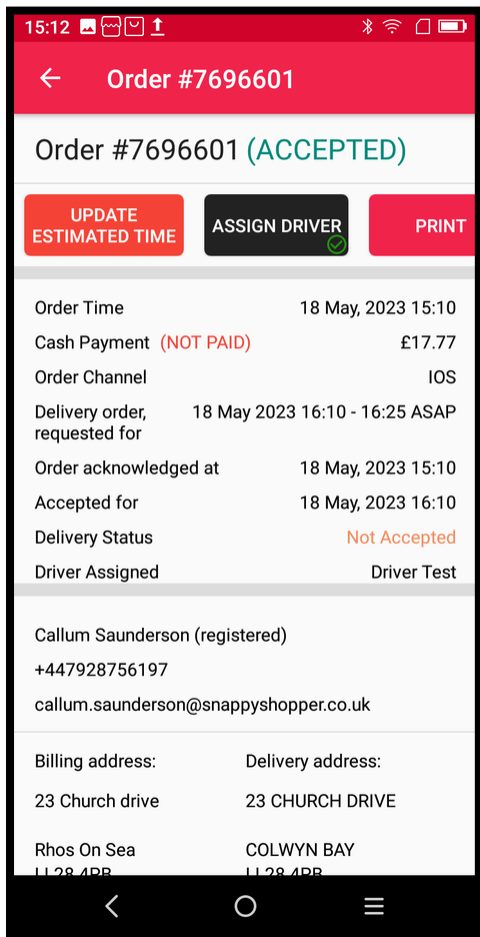


Fig 2.1.5 - Receipt

Once the time slot has been selected, the device will print out a picking receipt which will detail the items to be picked.

The picking receipt will also show the customers delivery address details, contact details and method of payment.

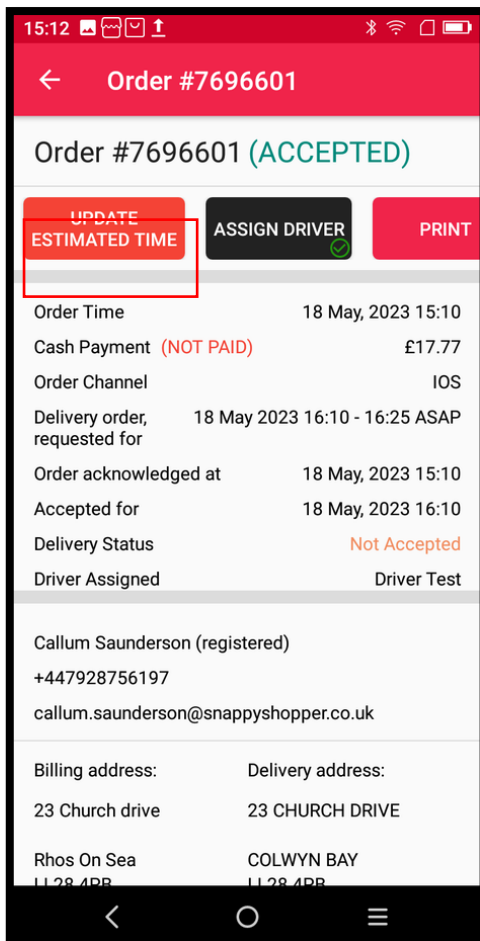


Fig 2.1.6 – Update Estimated Time

If you need to adjust the estimated time inputted, click on the **“Update Estimated Time”** button at the top of the Order Detail page.

Once updated, this will update the customer via email which will manage their delivery expectations.

NOTE:

- The delivery target on our platform is delivery within 30-60 minutes so please refrain from delaying delivery unless absolutely necessary.

2.2 Assigning a Driver

Once the order has been accepted and printed, it is time to assign your driver.

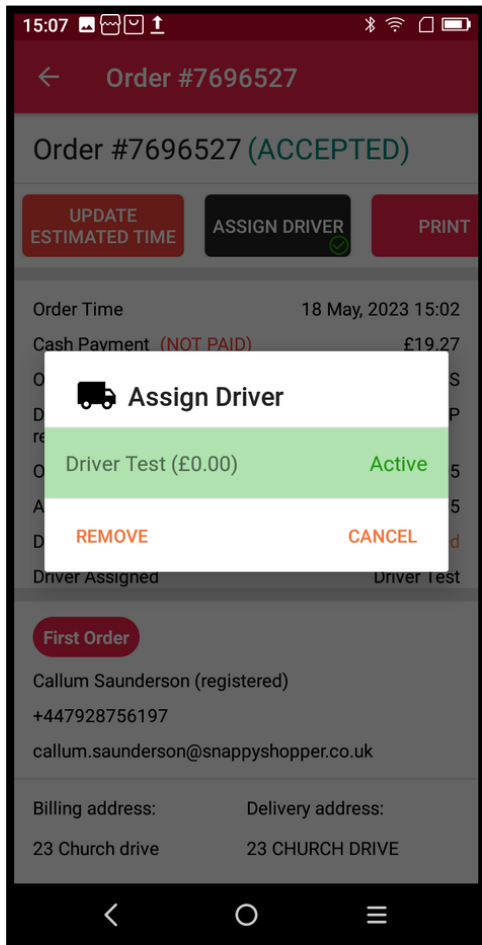


Fig 2.2.1

Click on the **“Assign Driver”** button at the top of the Order.

Select the name of the Driver you wish to assign.

Once selected, the driver will receive a notification on their Driver App account.

NOTES:

- If there are multiple Drivers set up for your store, all names will appear.
- A Driver will only appear as **‘active’** if they are logged in on their Driver App account.

2.3 Refunding an Accepted Order

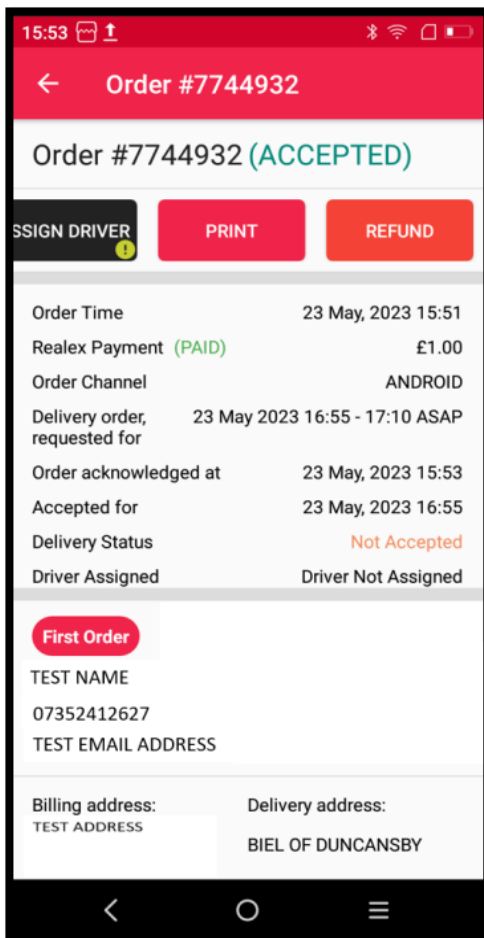


Fig 2.3.1

Swipe left at the top of the screen to reveal the **“Refund”** button.

Click **“Refund”**.

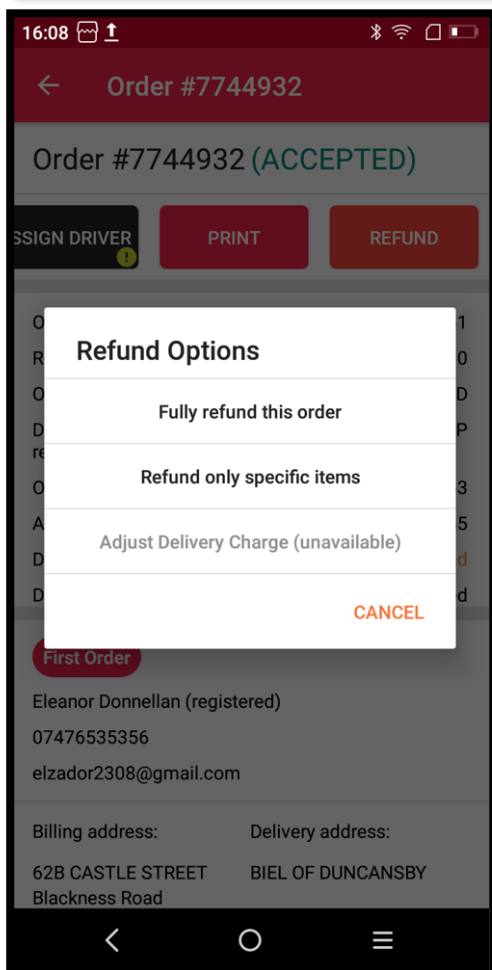


Fig 2.3.2

You now have the option to fully refund the order, refund a specific item (see **Section 5.4** for more details on refunding specific items) or adjust the delivery charge.

In this example, the customer did not pay a delivery charge so this option to adjust is not available.

Click on **“Fully refund this order”**.

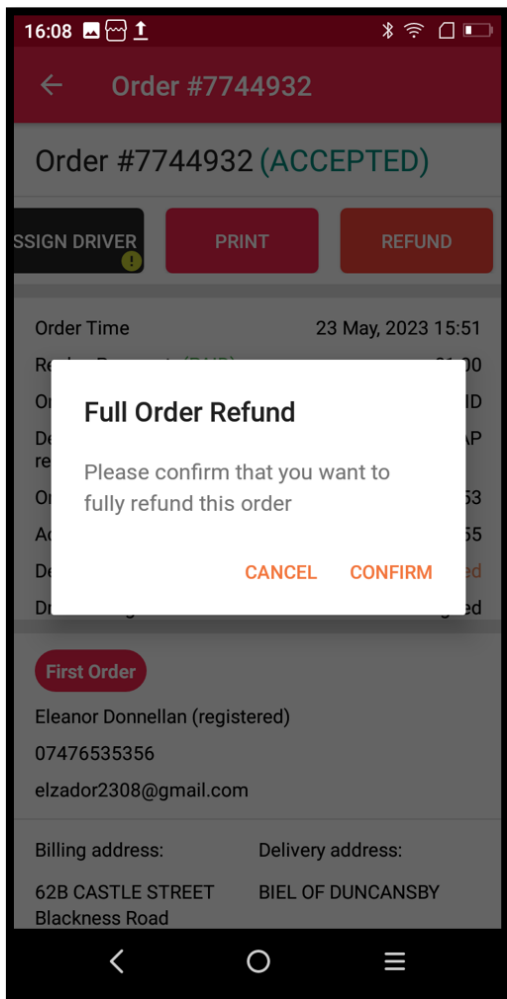


Fig 2.3.3

If you are happy to proceed, click **“Confirm”**.

The card refund will automatically process once confirmed.

Section 3 - Declining an Order

The section below will outline how to decline a Pending Order. Every effort should be made to fulfil orders and orders should only be declined/cancelled in emergency situations.

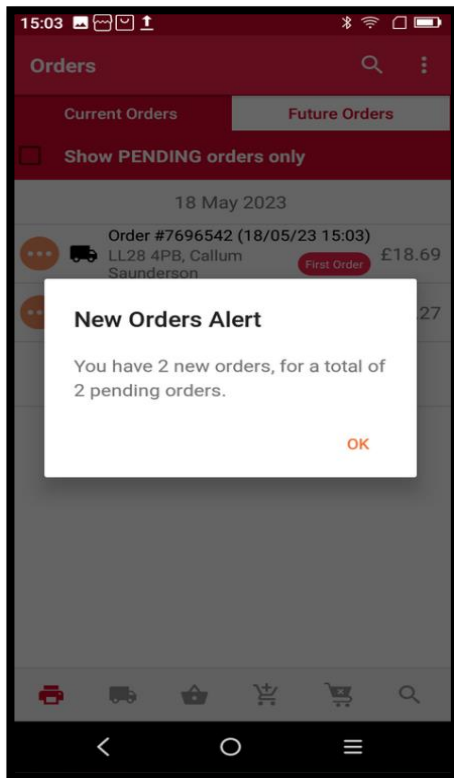


Fig 3.0

A “**New Orders Alert**” message will show when there is a new order detailing how many orders are new and pending.

Press “**OK**” to this message.

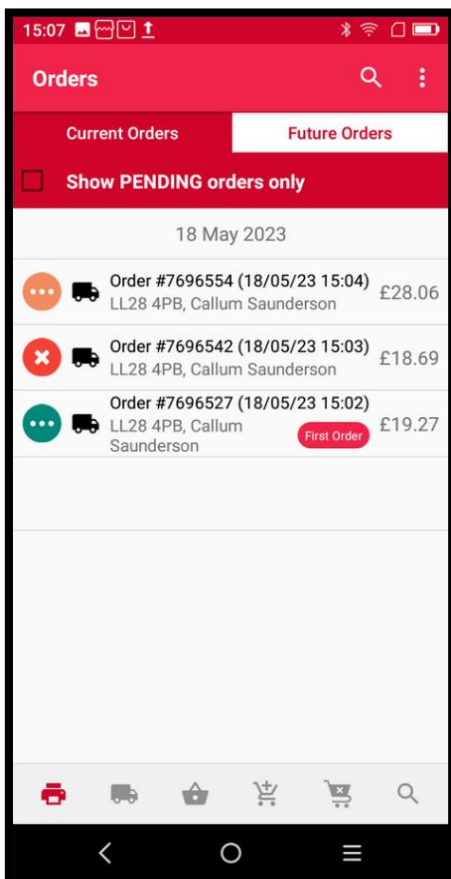


Fig 3.1

The “**Current Orders**” menu shows:

- Order Reference Number.
- Order Status.
- Current Date.
- Order Value.
- A “**First Order**” label to identify first time customers.

Press on the order to get more details.

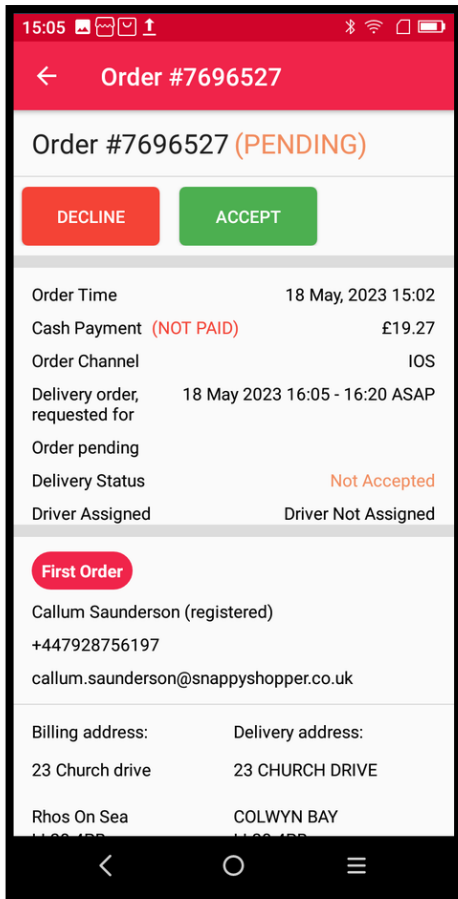


Fig 3.2

Click on the Pending Order.

You will have the option to **“Decline”** or **“Accept”** the Pending Order.

This screen will also give you details of the customer delivery address, contact details and whether it is a cash or card payment.

Press **“Decline”** at this point.

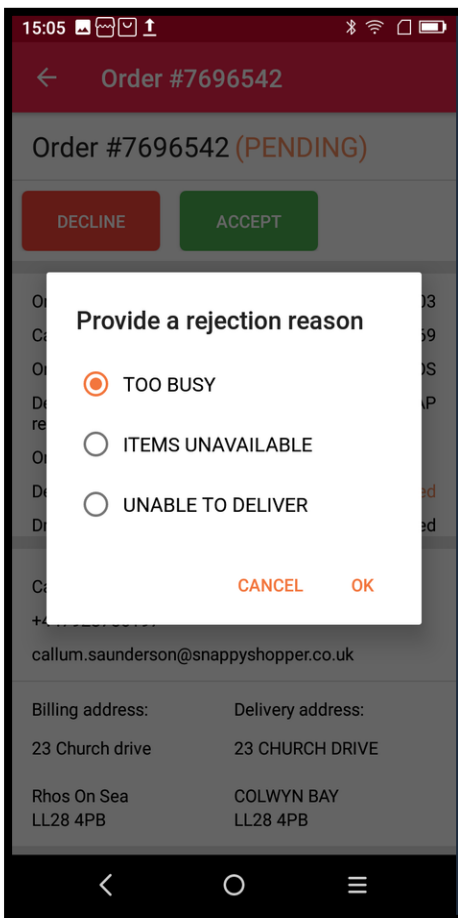


Fig 3.3

You will be presented with a list of rejection reasons.

Select the required reason and then press **“Ok”**.

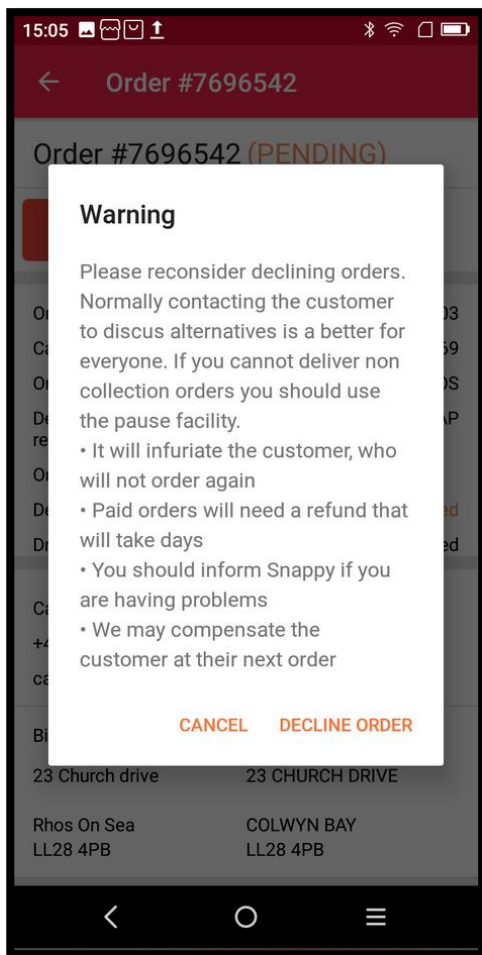


Fig 3.4

You will be presented with a warning. Please read carefully before declining.

Press **“Decline Order”** if you wish to proceed.

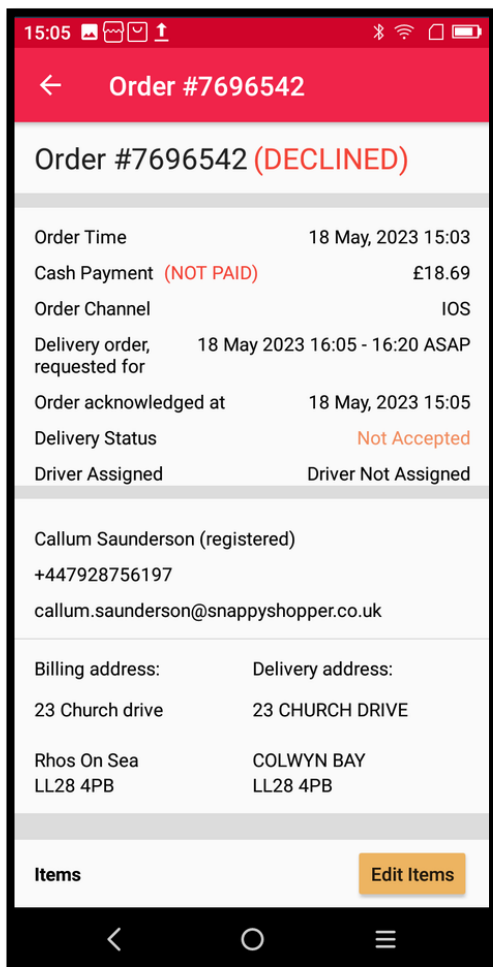


Fig 3.5

The order information will update to show that the order has been declined.

A notification will be sent to the customer that the order has been declined and will detail the reason why from your selection in **Fig 3.3** above.

Section 4 - Driver App

In this section we will cover the Driver App; how they login to the app as a Driver, how a Driver receives an order and what is done when the order is delivered to the customer.

4.1 - Logging in as a Driver

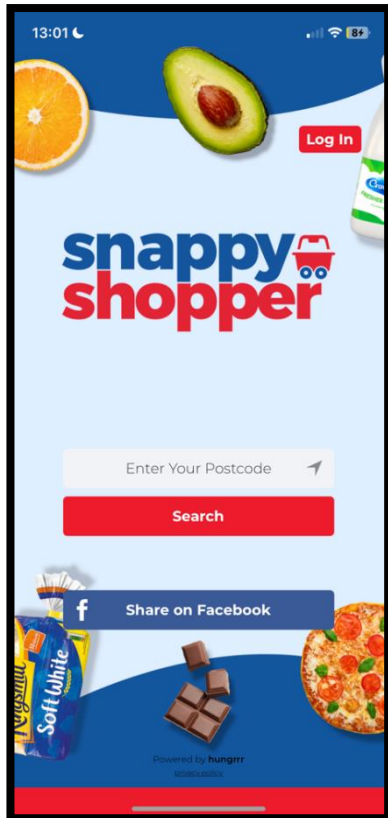


Fig 4.1.0

When you launch the app on the phone you should be presented with a screen like this.

Select the **“Login”** option in the top right corner to login as a Driver.

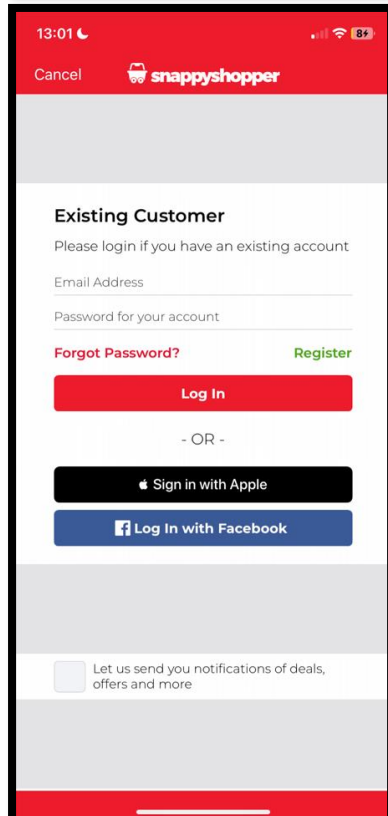


Fig 4.1.1

Enter your Driver Login Email into the **“Email Address”** field.

Enter your Driver Login Password into the **“Password”** field.

Select **“Login”**.

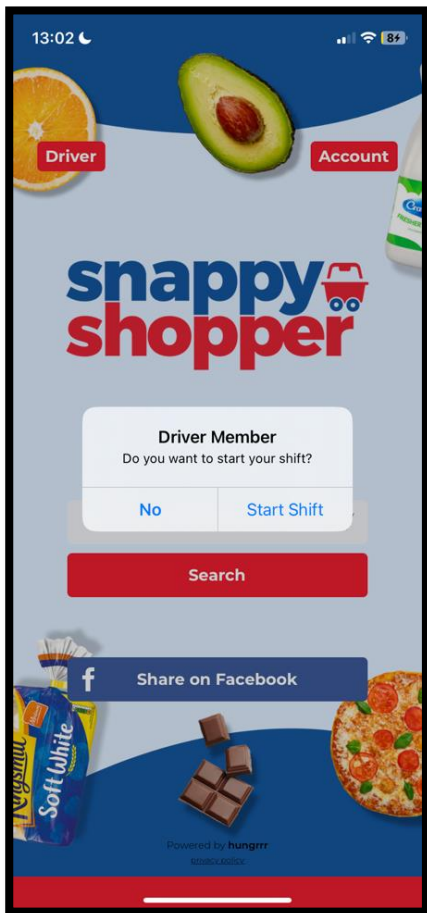


Fig 4.1.2

After logging in, you will now be presented with the option to **“Start Shift”**.

Please select **“Start Shift”** if you are ready to deliver store orders.

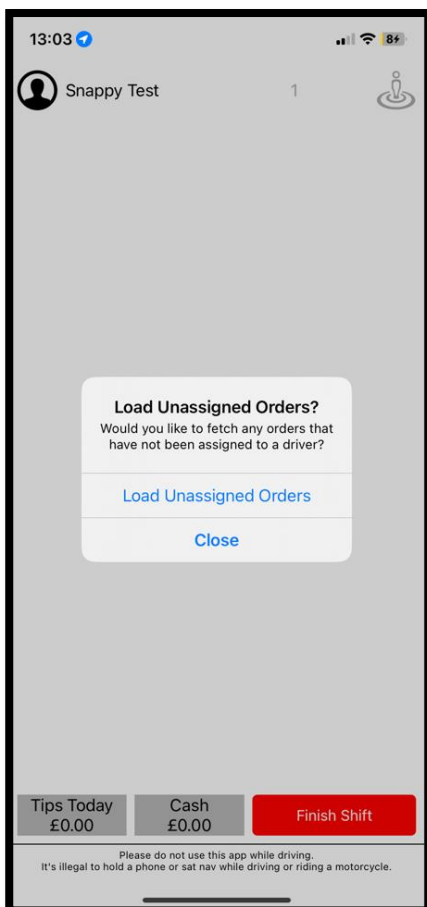


Fig 4.1.3

You will now be presented with a screen asking if you want to load any unassigned orders.

Please select **“Load Unassigned Orders”** to access any store orders that may be available for delivery.

4.2 - Receiving and Delivering an Order

Once the order has been assigned to the driver, the driver will get a notification that there is a new order.

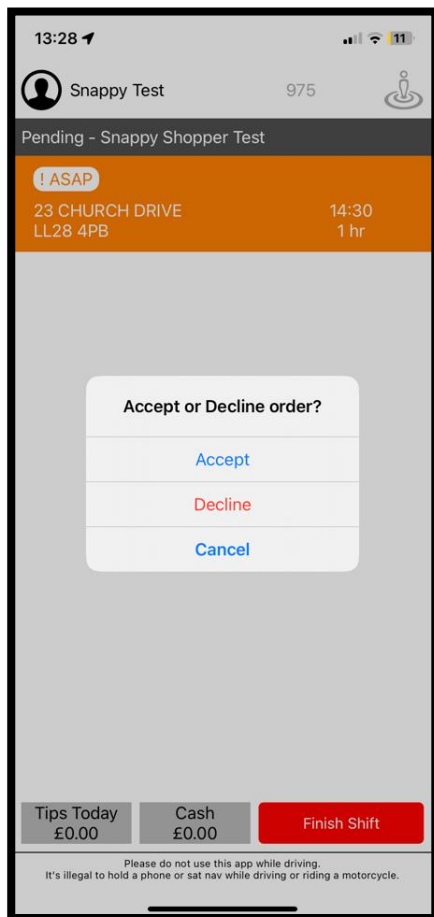


Fig 4.2.0

The driver will get a notification on their device that a new order is in the system.

This order will show as pending and be highlighted in orange.

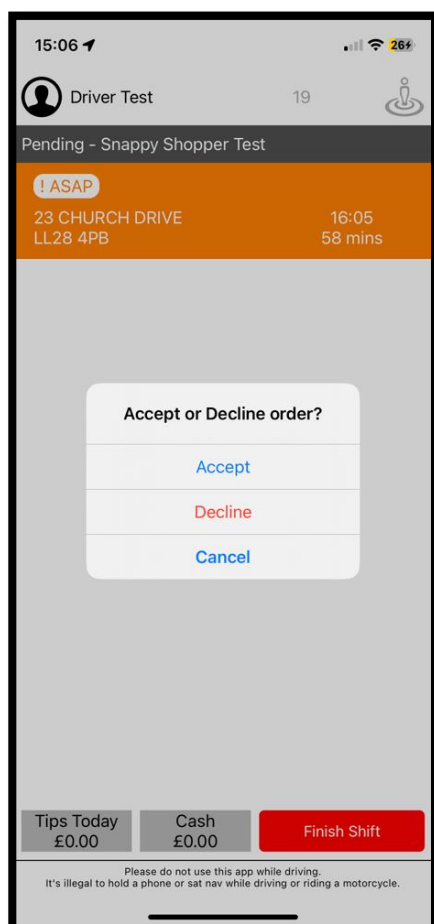


Fig 4.2.1

Once the driver has hit “OK”, the driver will get the option to “Accept”, “Decline” or “Cancel”

Press “Accept”.

Once accepted, the order will show under the Drivers workload and will show the delivery time for the order.

NOTE:

- If the Driver declines an order, the order will need to be assigned to another driver via the Tablet device.



Fig 4.2.2

The order has changed from orange to green and is now showing as accepted.

To see order details (goods ordered, delivery address, value to be collected if it's a cash order), the Driver should click on the order - see **fig 4.2.3**



Fig 4.2.3

When viewing the Order, the Driver has the option to phone the customer or store and get directions to the customer's address.

Once the Driver is ready to deliver to the customer, they should press **"En Route"**. This will send a notification to the customer to say the Driver is on their way. The customer will be able to track the Driver on the Snappy Shopper App through gps location tracking.

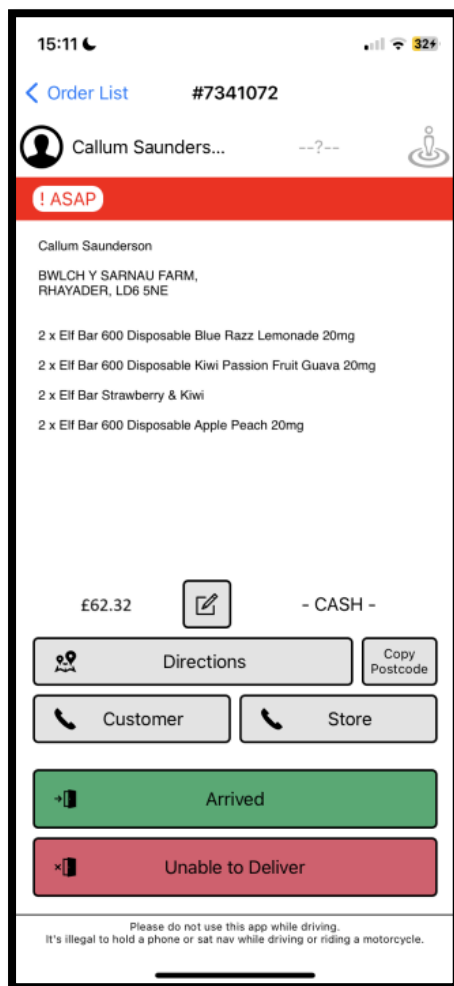


Fig 4.2.4

When the Driver arrives at the customers address, they should press the **“Arrived”** button and this will also notify the customer that they have arrived.

If the order is a **cash** order, the Driver will be prompted with a screen detailing what amount they need to collect from the customer. See **Fig 4.2.5** for more details on this.

If the order is a **card** order, after pressing **“Arrived”**, continue to **Fig 4.2.8**.

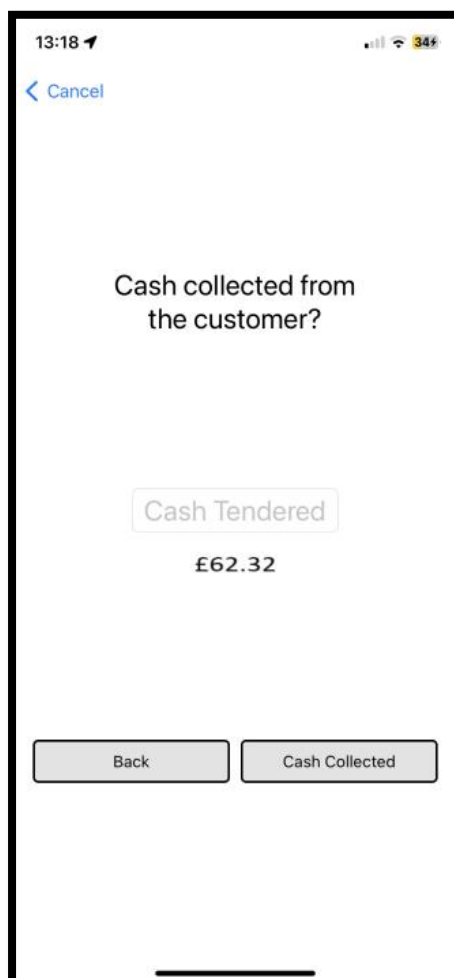


Fig 4.2.5

This screen now shows the value of cash to be collected from the customer.

If the customer gives you a higher value, then owed (e.g. £70 or £80), input this in the box **“Cash Tendered”** and it will calculate the change to be given back to the customer. (**Fig 4.2.6**)

If the customer provides the Driver with the correct cash, they should press **“Cash Collected”** once they have collected the money from the customer and they will be prompted with a screen for the customer to sign. (**Fig 4.2.8**)

15:53

< Cancel

Cash collected from the customer?

£80.00

£62.32

Change Due: £17.68

Cash Tendered Done

1	2 ABC	3 DEF
4 GHI	5 JKL	6 MNO
7 PQRS	8 TUV	9 WXYZ
.	0	⌫

Fig 4.2.6

In this example the customer has handed over £80.

The Driver should enter “**80.00**” in the “Cash Tendered” box and press “**done**”.

NOTE:

- The driver must remember to **key in the decimal point** in the value field.

15:53

< Cancel

Cash collected from the customer?

£80.00

£62.32

Change Due: £17.68

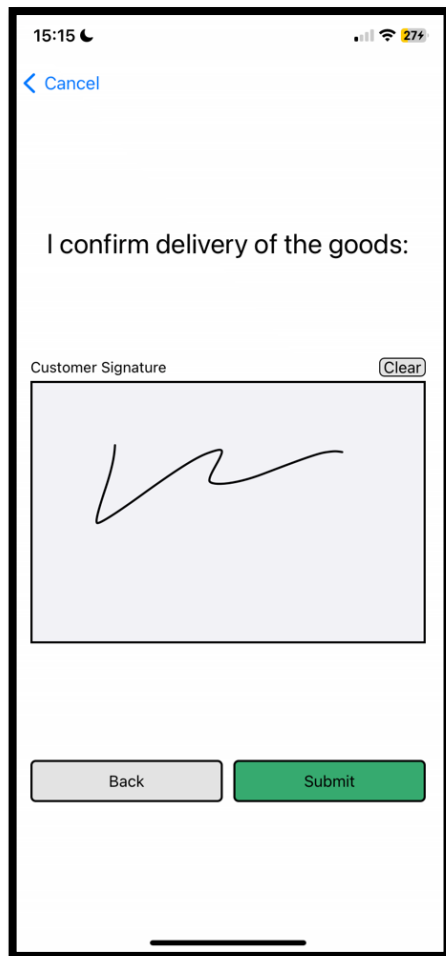
Cash Tendered Done

1	2 ABC	3 DEF
4 GHI	5 JKL	6 MNO
7 PQRS	8 TUV	9 WXYZ
.	0	⌫

Fig 4.2.7

The system will now display what the Driver has entered as the cash tendered and show how much change the customer is owed.

After the Driver has given the customer their change, they should press “**done**” and select “**Cash Collected**”.



15:15

< Cancel

I confirm delivery of the goods:

Customer Signature Clear

[Handwritten signature]

Back Submit

This is a mobile application interface for confirming delivery. At the top, the status bar shows the time as 15:15 and a battery level of 27%. Below the status bar is a blue back arrow and the word 'Cancel'. The main text reads 'I confirm delivery of the goods:'. Below this is a signature box labeled 'Customer Signature' with a 'Clear' button in the top right corner. The signature box contains a handwritten signature. At the bottom of the screen are two buttons: a grey 'Back' button and a green 'Submit' button.

Fig 4.2.8

Customer should sign this box and return the device to the Driver.

When signed press **“Submit”**.

4.3 - Driver App - Unable to deliver

If the Driver attends an address but for some reason, they are unable to deliver the customer goods, this needs to be recorded correctly on the App.

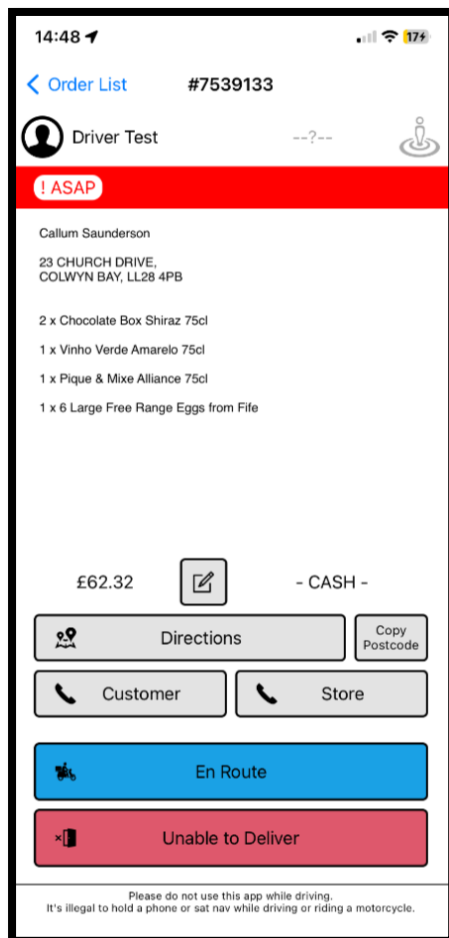


Fig 4.3.0

On the relevant Order screen, the Driver should press **“Unable to Deliver”**.

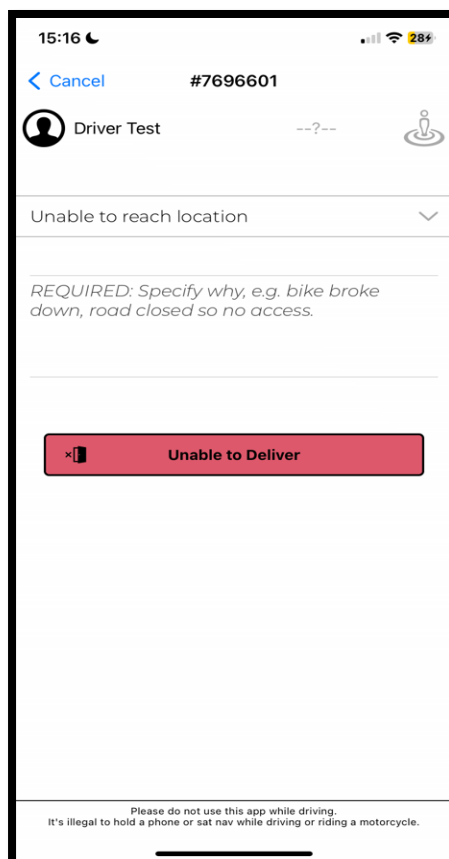


Fig 4.3.1

The Driver will now be presented with the option to select a reason and leave a comment.

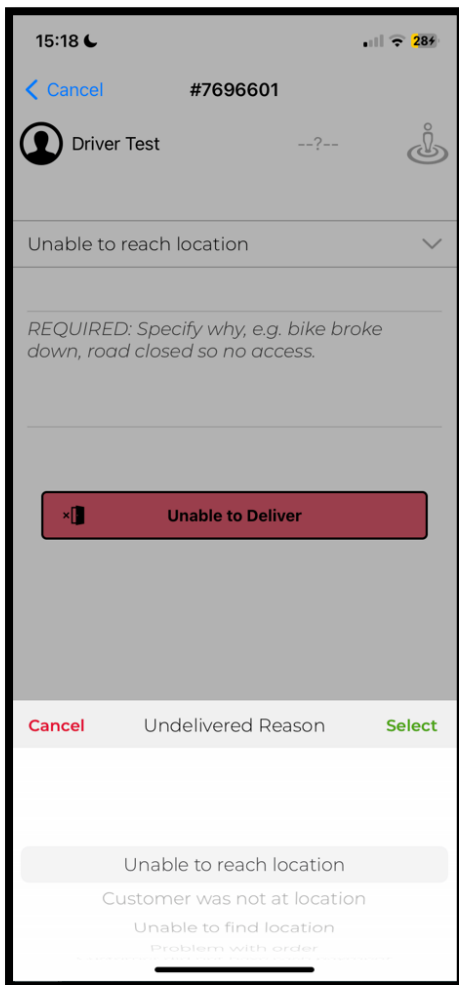


Fig 4.3.2

The Driver should select the reason that fits best as to why they were unable to deliver and click **“Select”**.

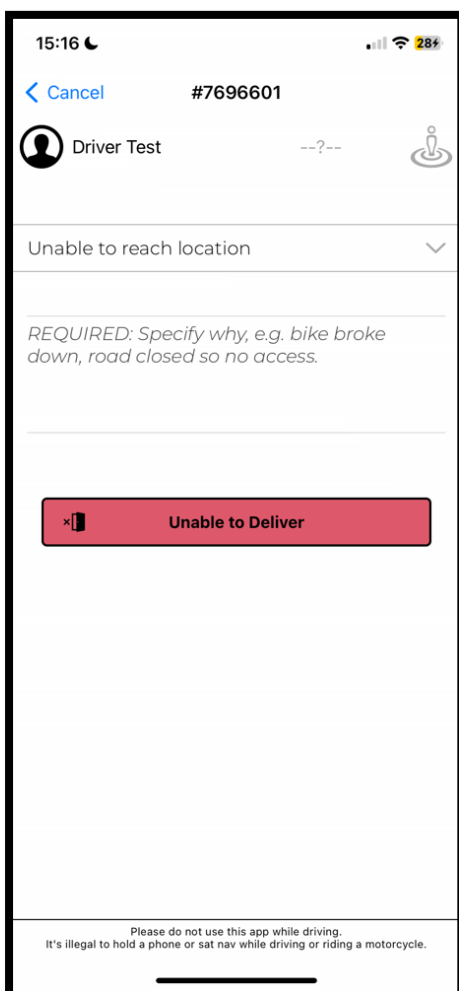


Fig 4.3.3

The Driver will now be presented with the screen showing what reason they have selected.

The Driver should now select **“Unable to Deliver”** once they are happy that they have inputted the correct information.

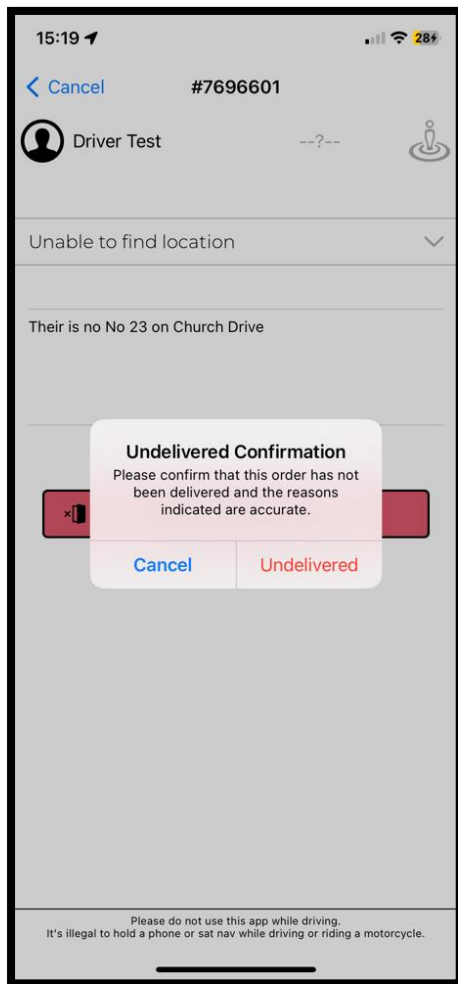


Fig 4.3.4

A further prompt will appear to ask the Driver to confirm that they are happy to record this order as undelivered.

To confirm, the Driver should select the **“Undelivered”** option in red.

NOTE:

- Marking an Order as **“Unable to Deliver”** does not action a refund, a refund needs to be actioned on the tablet device. See section 2.3.
- If you mark an order as **“Unable to Deliver”** by accident, please contact our Support Team.

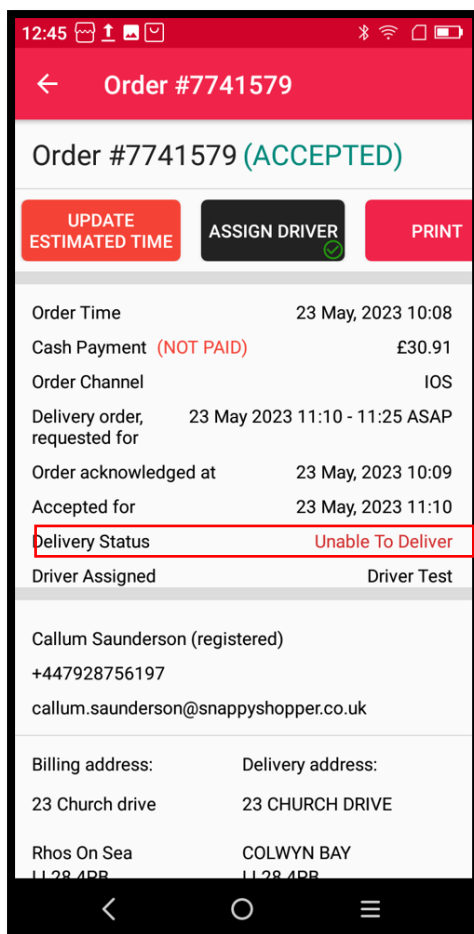


Fig 4.3.5 – On Tablet Device

This information shows under the **“Delivery Status”** once you have gone into the undelivered order page.

NOTE:

- Marking an order as **“Unable to Deliver”** will not action a refund for card orders. A refund must be actioned separately when viewing the order by scrolling sideways along the top options and pressing **“Refund”**. See Fig 2.3.1

4.4 - Driver App - Age Check Prompts – Age Restricted Products Only

When the Driver is delivering items to customers that require age verification checks, the next few screens will show what steps the Driver needs to complete for these types of deliveries.

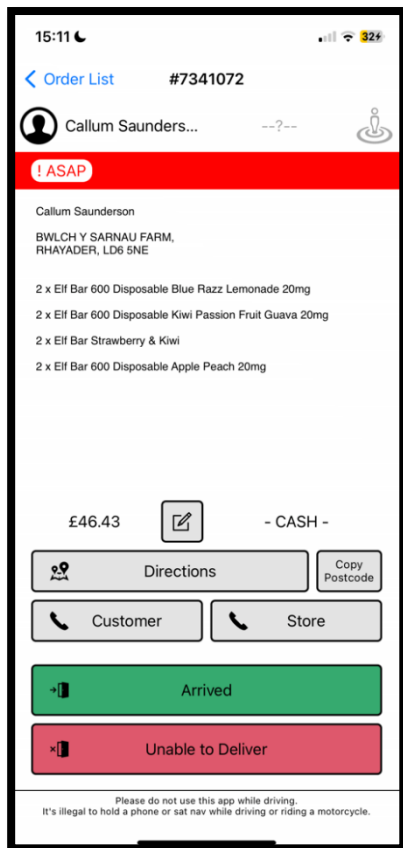


Fig 4.4.0

In the order example on the left, all items ordered are age restricted lines so they will require age check verification.

Select the **“Arrived”** button and you will be prompted with the Age Verification box. See **fig 4.4.1**

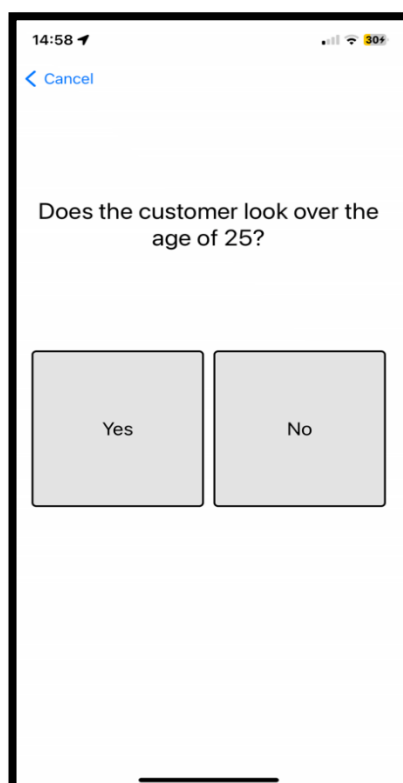


Fig 4.4.1

If the customer is over the age of 25, the Driver should select the **“Yes”** button and continue to handle the delivery as normal.

If the customer looks to be below the age of 25, the Driver should select **“No”**.

The Driver will now be taken to the next screen where they will be given a selection of ID types to ask the customer to produce so they can prove they are above the legal age for these items.

14:59

< Cancel

Type(s) of proof of age identification shown by the customer:

- ☐ Passport
- ☐ Driver Licence
- ☐ ID bearing the PASS hologram
- ☐ MOD Identity card
- ☐ EU National Identity card

Back

Fig 4.4.2

The Driver will now be presented with the list of ID types that Snappy Shopper allow for age check items.

The Driver should tick the ID type that the customer has presented. The Driver should ensure the Date of Birth (DOB) is correct and the photo matches to the customer.

Once the Driver presses the **“Next”** button, they will be presented with a screen which will allow them to record the DOB from the ID and the system will check to ensure that the DOB is valid.

See fig 4.4.3

10:26

< Cancel

Date of birth shown on the proof of age identification:

20	February	2002
21	March	2003
22	April	2004
23	May	2005
24	June	2006
25	July	2007
26	August	2008

Back Next

Fig 4.4.3

The system will automatically default to the first available valid DOB that the customer needs to have to be over 18 years of age.

The Driver should change the DOB to the one that is on the ID that the customer presented to them.

Select **“Next”** and this will allow you to finish the delivery by getting the customer to sign for it.

Note:

- If the ID or DOB is not valid then you should follow the steps from **fig 4.5.2** onwards.

4.5 - Driver App - Age Check Prompts - Mixed Orders (Age Restricted & Non-Age Restricted Items)

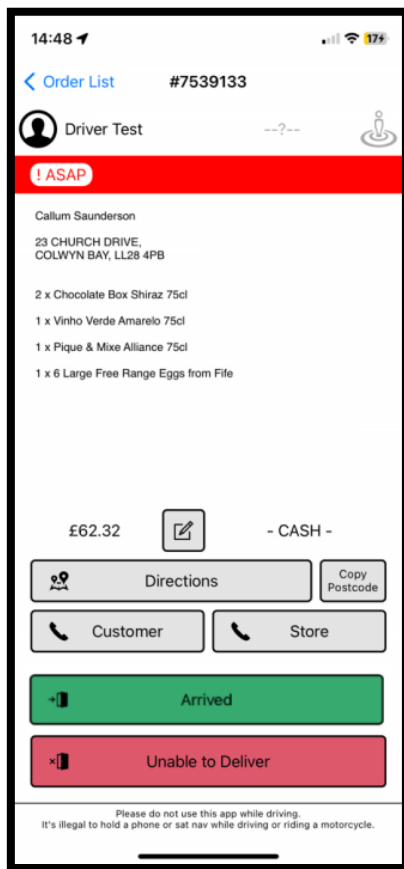


Fig 4.5.0

In the order example on the left, the order has a combination of age restricted items and non-age restricted items.

Select the **“Arrived”** button and you will be prompted with the Age Verification box.

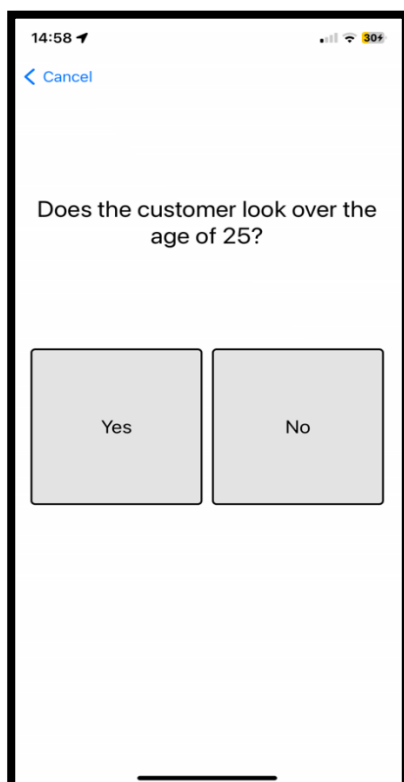


Fig 4.5.1

If the customer is over the age of 25, the Driver should select the **“Yes”** button and continue to handle the delivery as normal.

If the customer looks to be below the age of 25, the Driver should select **“No”**

In this scenario, we will look at what to do when the customer looks to be below the age of 25 and has no valid ID.

14:49

< Cancel

Type(s) of proof of age identification shown by the customer:

- ☐ Driver Licence
- ☐ ID bearing the PASS hologram
- ☐ MOD Identity card
- ☐ EU National Identity card
- ☐ Valid ID Unavailable

Back

Fig 4.5.2

Once the Driver has selected **“No”** (see **fig 4.5.1**), they will be presented with the list of ID types that Snappy Shopper allow for age check items.

The Driver should scroll down and select the **“Valid ID Unavailable”** option.

The Driver should continue by pressing the **“Next”** button.

15:23

< Back #7696554

Driver Test --?--

Order Items Order Note

Apothic Red 75cl	
Qty: 2	£18.00
Dentastix Medium 7 Sticks	
Qty: 2	£3.90
Panasonic AAA 1.5V Zinc Carbon Batteries 4 Pack	
Qty: 1	£1.49

Select Age Restricted

Please do not use this app while driving.
It's illegal to hold a phone or sat nav while driving or riding a motorcycle.

Fig 4.5.3

The Driver will now be taken to a page which shows all the items on the order.

The customer has not produced any valid ID so the age restricted products must be returned to the store.

The Driver should press the **“Select Age Restricted”** button to select all the age restricted items.

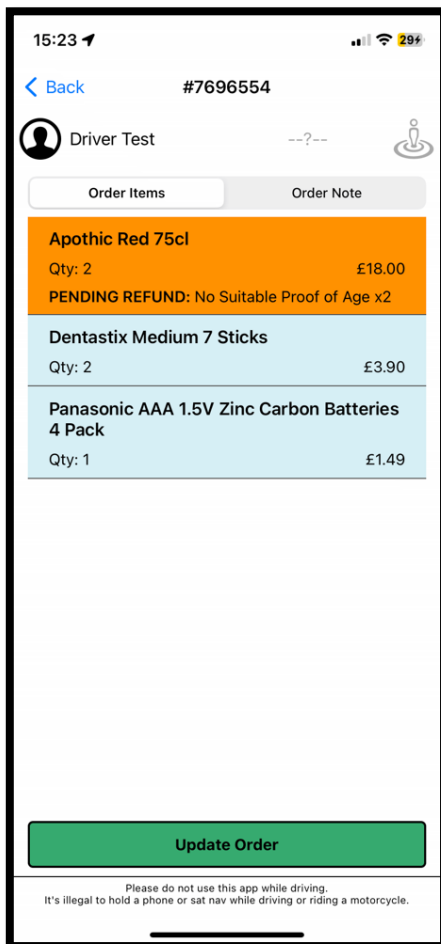


Fig 4.5.4

All age restricted items will be selected automatically.

The Driver should now press **“Update Order”** to begin the refund process for the age restricted items.

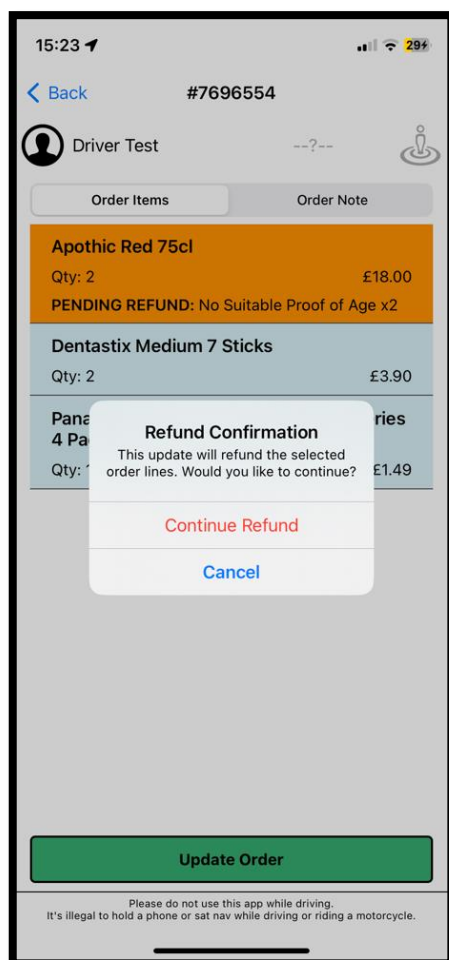


Fig 4.5.5

The Driver can now confirm the refund for the age restricted items.

The other non-age restricted items can be delivered as normal.

Once the Driver has selected **“Continue Refund”**, they will be taken to a cash collection page if the order is a cash order or the signature page if it has been paid by card.

Cash collection – see **fig 4.2.7**

Signature Page – see **fig 4.2.8**

Section 5 - Order Functions on Tablet

In this section we will cover the process of handling unavailable products, processing substitutions and returns.

5.1 - Unavailable Product

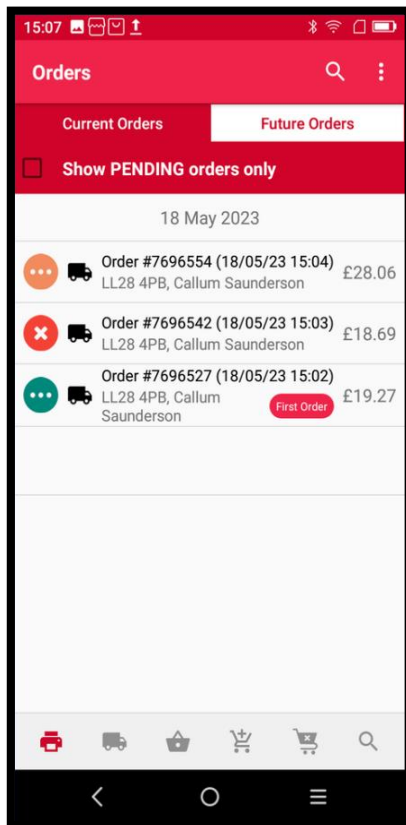


Fig 5.1.0 – Unavailable product

Select the customer order from the “**Current Orders**” Menu

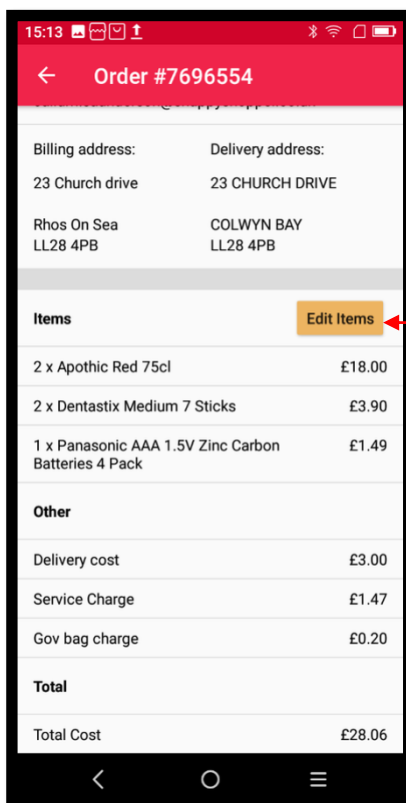


Fig 5.1.1

Scroll down the order screen until you see the “**Edit Items**” button.

Click on “**Edit Items**” and this should bring up a screen allowing you to modify the order.

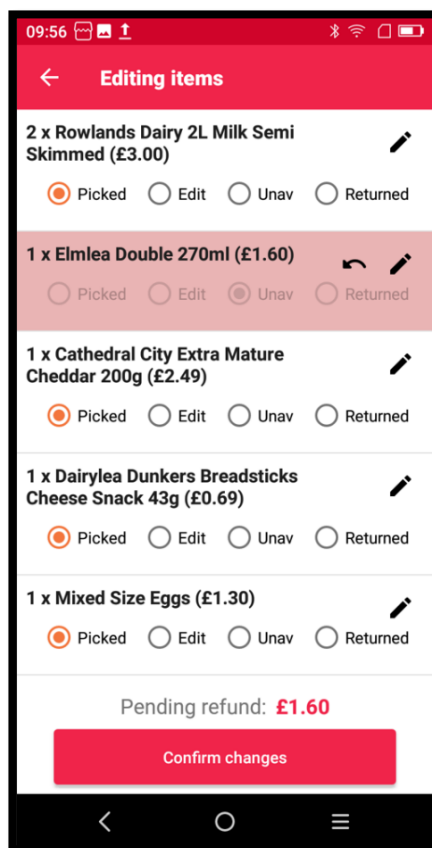
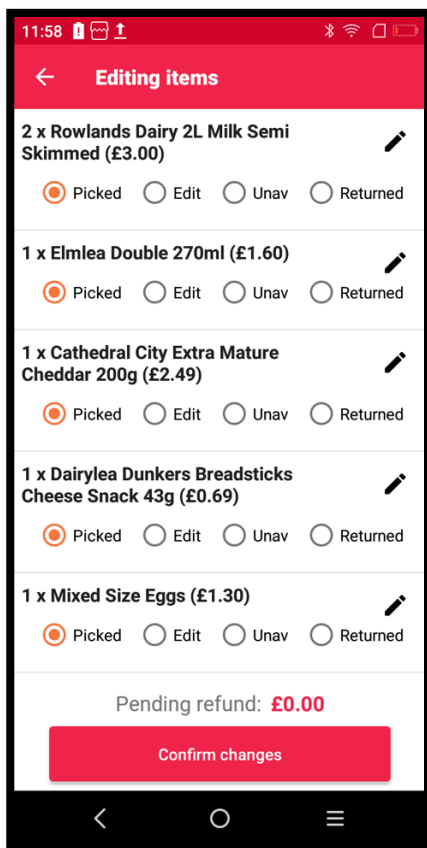


Fig 5.1.2

This next screen will give you 4 options to choose from for each product.

For this example, click on “Unav”.

You will see there is now a pending refund waiting to be confirmed. If this was a card order, then the refund will be done automatically to the customer’s card once confirmed.

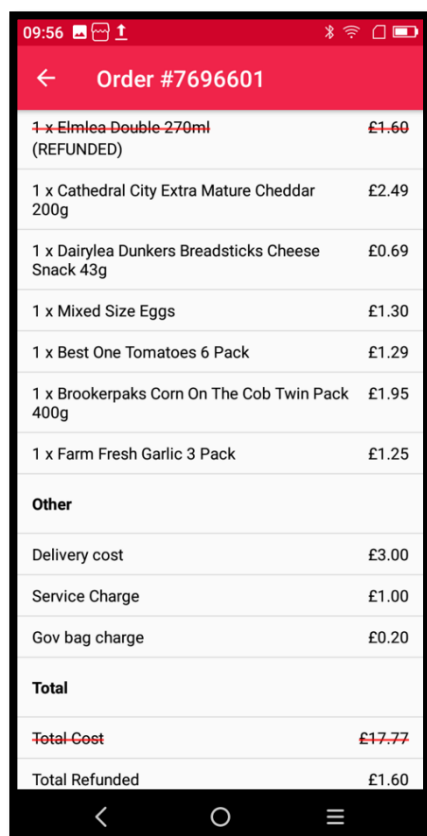


Fig 5.1.3

Once the changes have been confirmed you will see the product has now been crossed out and refunded.

The receipt can be re-printed for the customer to reflect the changes.

5.2 - Substituting a Product

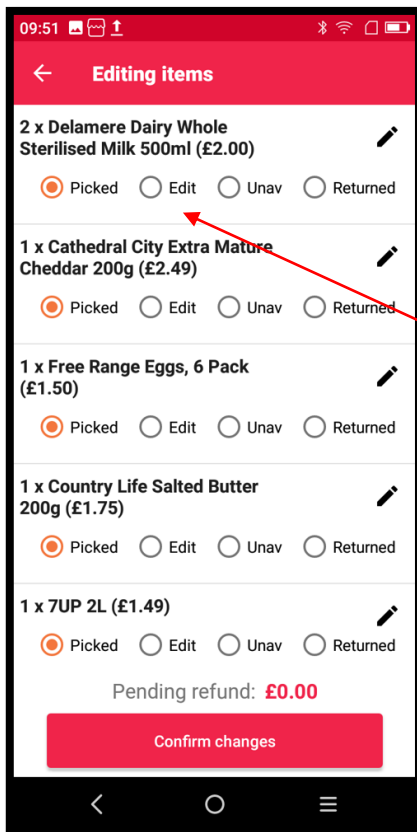


Fig 5.2.0

Access the customer orders as per **fig 5.1.0** and then select the pen option as per **fig 5.1.1**.

On the editing items screen select the **"Edit"** option against the product.

Once you have ticked this it will bring up a screen allowing you to search for an item to substitute it with.

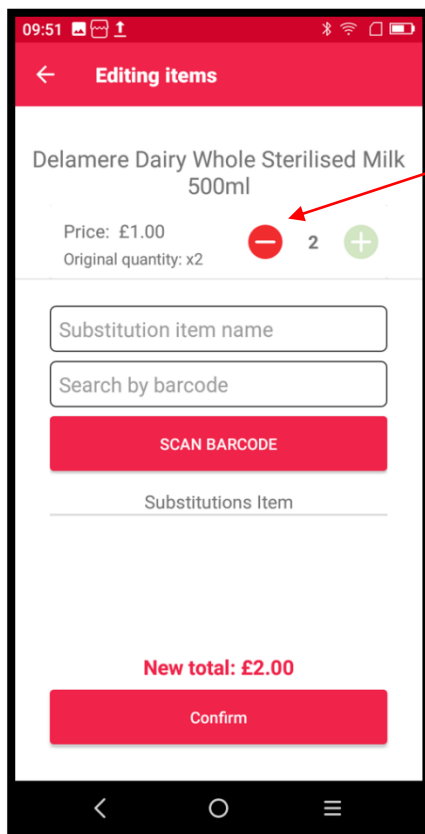


Fig 5.2.1

Use the buttons to reduce the quantity of the product to reflect how many you have available to deliver. If you have none of the product available, reduce to 0.

Underneath you can either search by name/barcode or use the **"Scan Barcode"** feature to select the product that you want to substitute with.

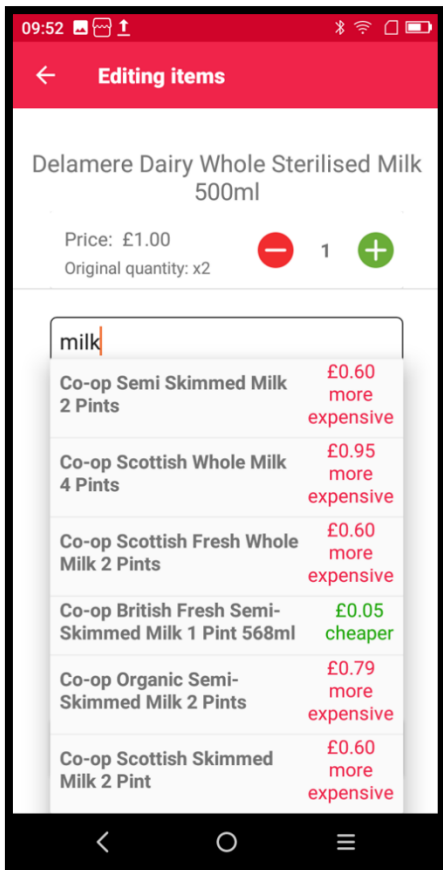


Fig 5.2.2

The system will display the possible substitute options and highlight if there is a price difference.

Note:

- If you substitute with a more expensive product, the customer will not be charged for the price difference.
- Card refunds will be processed automatically if confirmed.

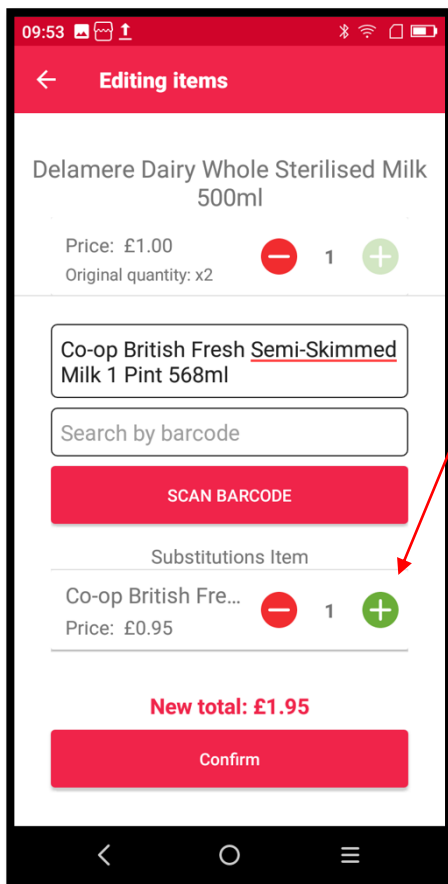


Fig 5.2.3

Once you have selected the product that you wish to substitute for, you can also edit the quantity of this substitute.

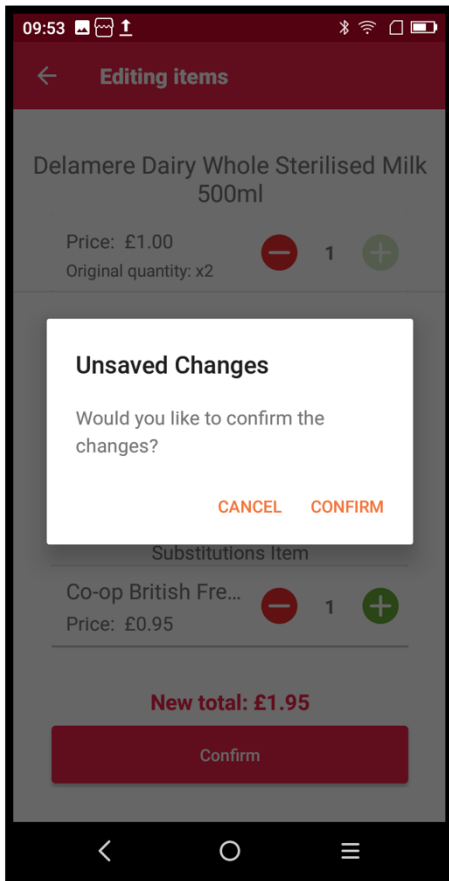


Fig 5.2.4

Once you are happy to proceed, select “Confirm”.

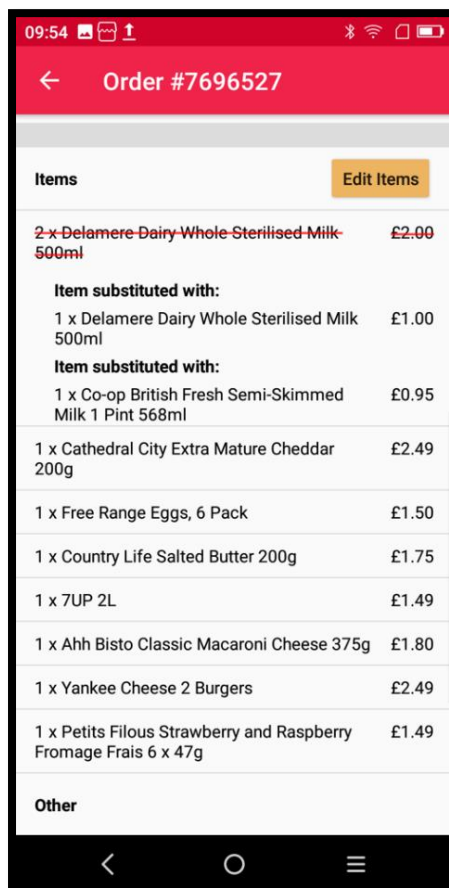


Fig 5.2.4

If the changes have been made successfully, the order screen should detail the substitutions like in the example.

The receipt can be re-printed for the customer to reflect the changes.

5.3 - Returning a Product

Returning a product would occur when the driver returns from the delivery and they inform the store that the customer refused certain products because of damage, quality etc.

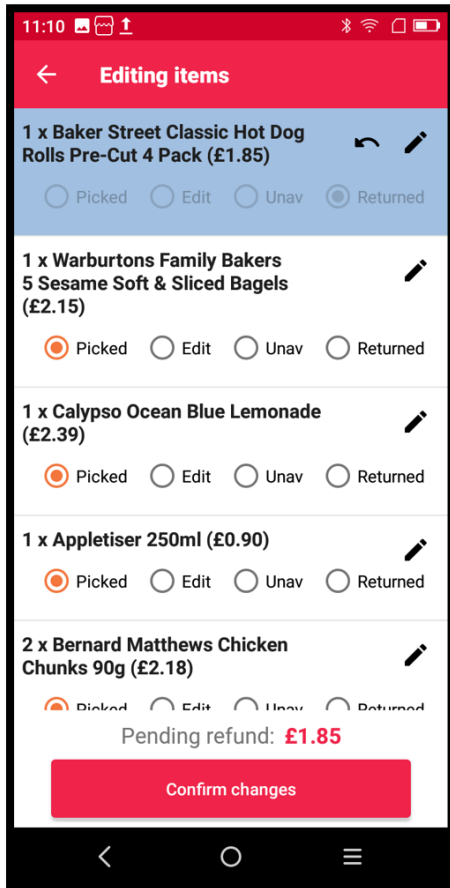


Fig 5.3.0 – Returned Product

Access the customer orders as per **fig 5.1.0** and then select the pen option as per **fig 5.1.1**.

On the editing items screen select the **“Returned”** option against the product.

Once you are happy this is the correct product for returning then select **“Confirm Changes”**

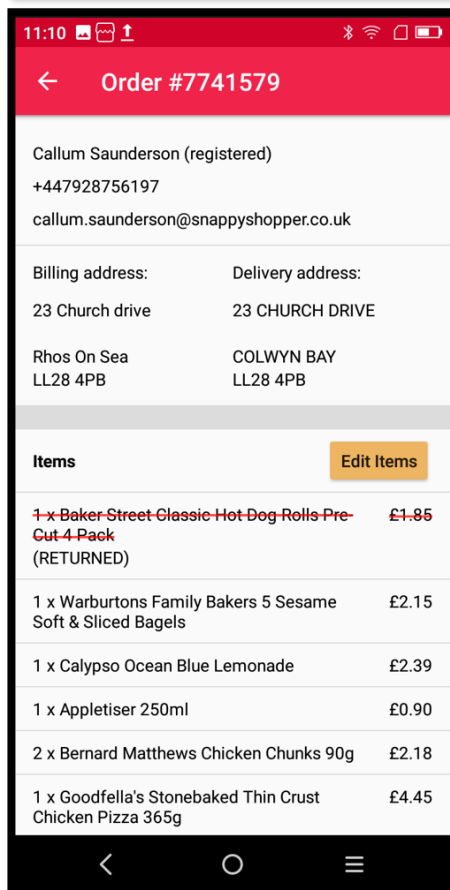


Fig 5.3.1

You can now go back into the customer's order and the changes will be visible.

The receipt can be re-printed for the customer to reflect the changes.

5.4 - Refunding a Product

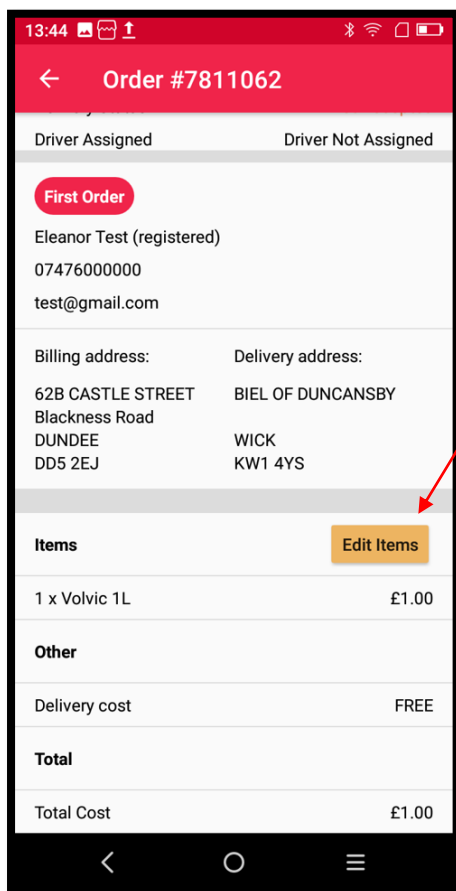


Fig 5.4.1

When viewing the order on the tablet device, scroll down and click on **“Edit Items”**.

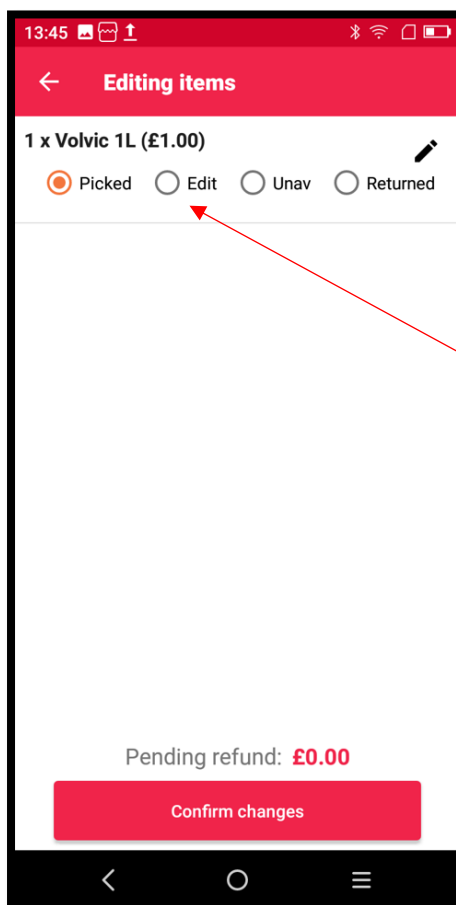


Fig 5.4.2

Click **“Edit”** on the specific product that you wish to refund.

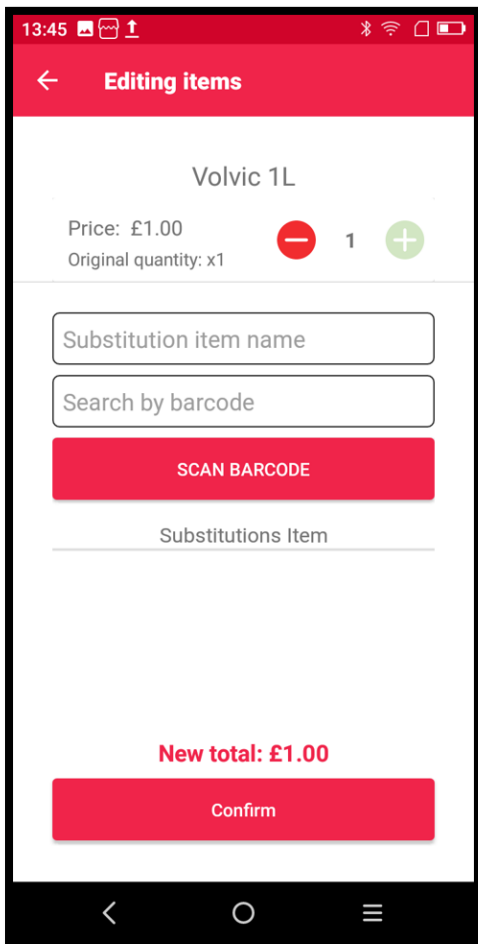


Fig 5.4.3

Reduce the quantity to 0 if you wish to refund the entire product line.

For Example: If the customer ordered Volvic 1L x2 and you only wanted to refund them for Volvic 1L x1, you would just reduce quantity to 1.

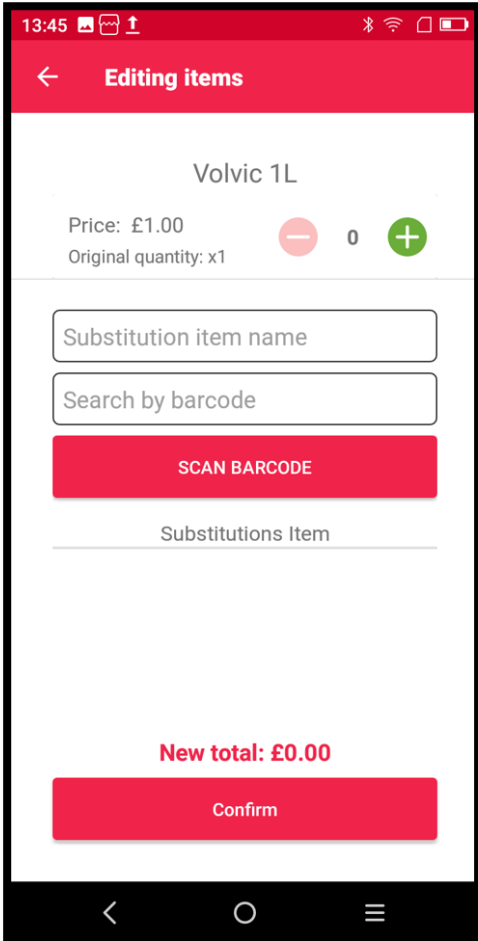


Fig 5.4.4

Once you have reduced the quantity, click **"Confirm"**.

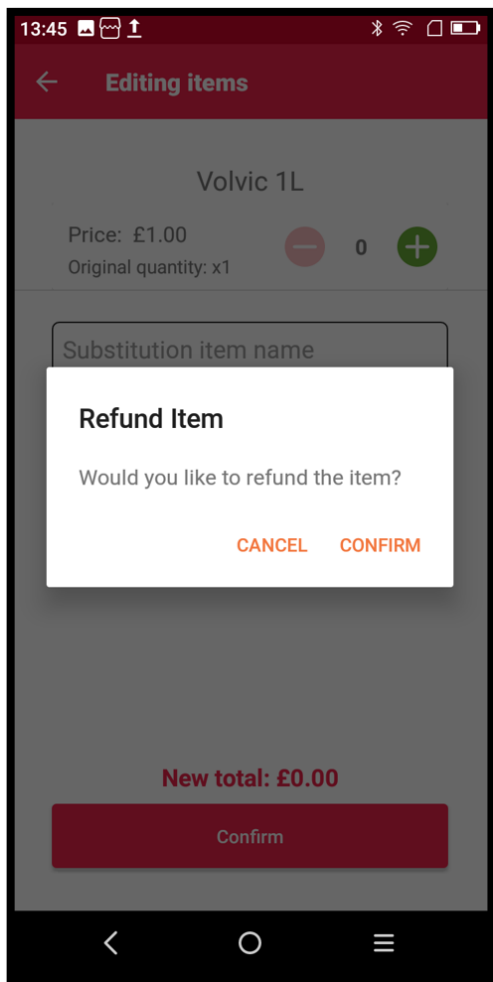


Fig 5.4.6

You will now be asked if you would like to confirm the refund.

Click **“Confirm”**.

NOTE: Card refunds will generate automatically but depending on the customers bank, it can take anything from 1-10 working days to reach their available balance.

Section 6 - End Shift

This section will cover how the Driver ends their shift and how the store collects the cash from the Driver deliveries.

6.1 - End Shift / Driver Cash Collection

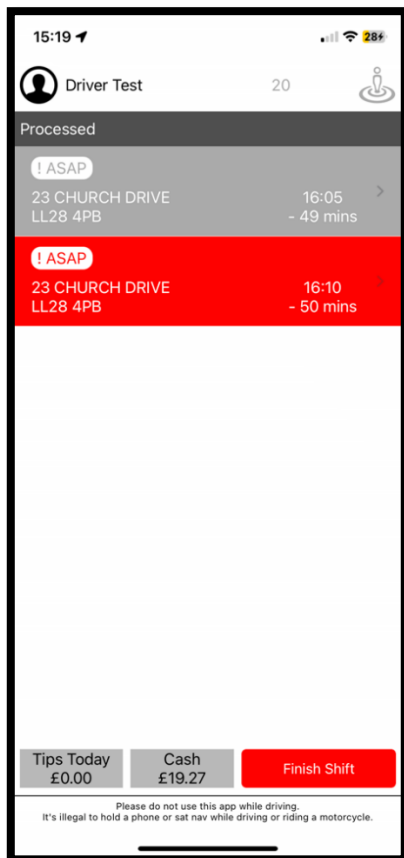


Fig 6.1.0

The Driver has an option on the app to **“Finish Shift”**.

If the driver tries to **“Finish Shift”** before they return the cash collected from customers to the store, the system will not allow this to happen. See **fig 6.1.1**

Notes:

- The cash owed figure displayed does not include any float they were given.
- Orders in grey are orders marked delivered by driver.
- Orders in red are orders declined by the driver.

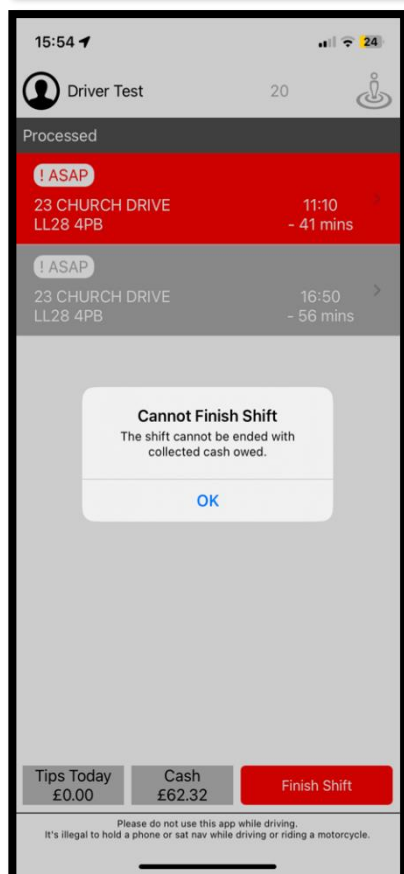


Fig 6.1.1

If the **“Finish Shift”** option is selected when there is cash owed on the app then it won't let the Driver finish the shift.

The only way the Driver will be able to finish the shift is to go back to the store to return the cash owed.

NOTE:

- The store will need to process the cash owed via the Tablet before the Driver can finish their shift.

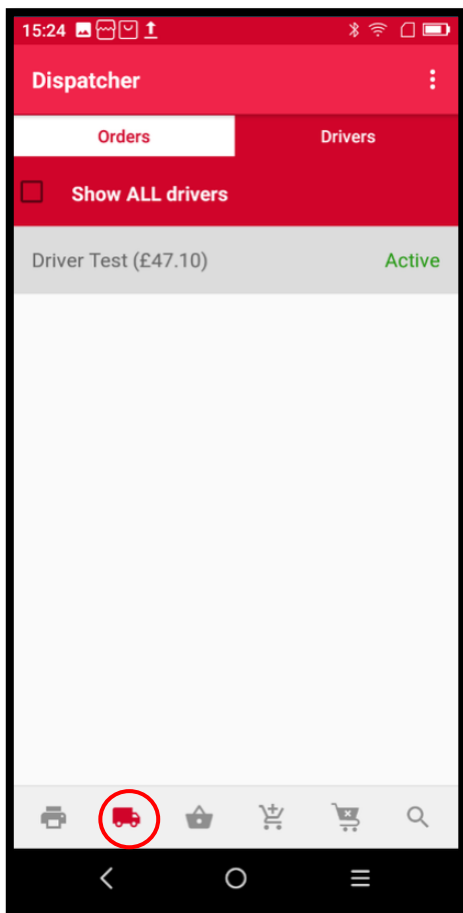


Fig 6.1.2

On the Store tablet, navigate to the “**Dispatcher**” menu by clicking on the symbol highlighted.

Once on this screen, click on the “**Drivers**” tab at the top of the screen.

Select the relevant Driver from your Driver list.

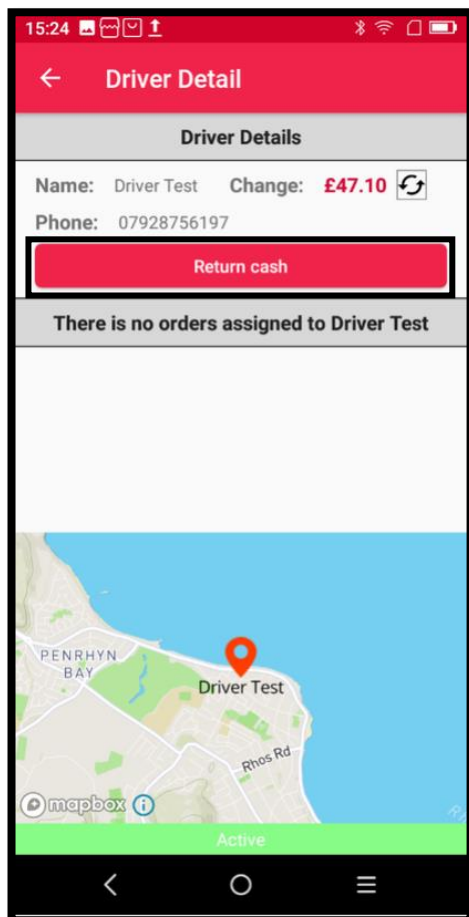


Fig 6.1.3

The next screen will display the Driver details and how much cash is owed.

Select the “**Return cash**” button and you will be presented with a screen to enter the value that the Driver is physically handing over.

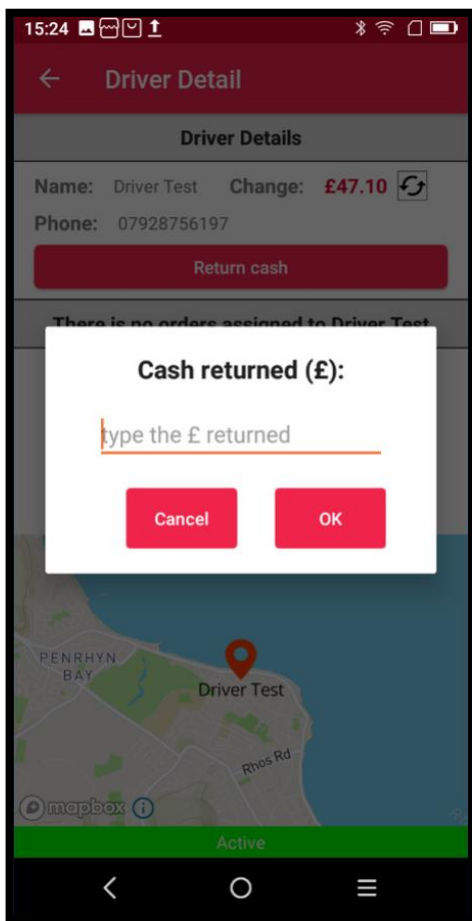


Fig 6.1.4

Count the cash that the Driver gives to you and make sure it matches what the system indicates they owe.

Enter the figure into the device. In this example the value to enter is £47.10. Press **“Ok”** once value has been entered.

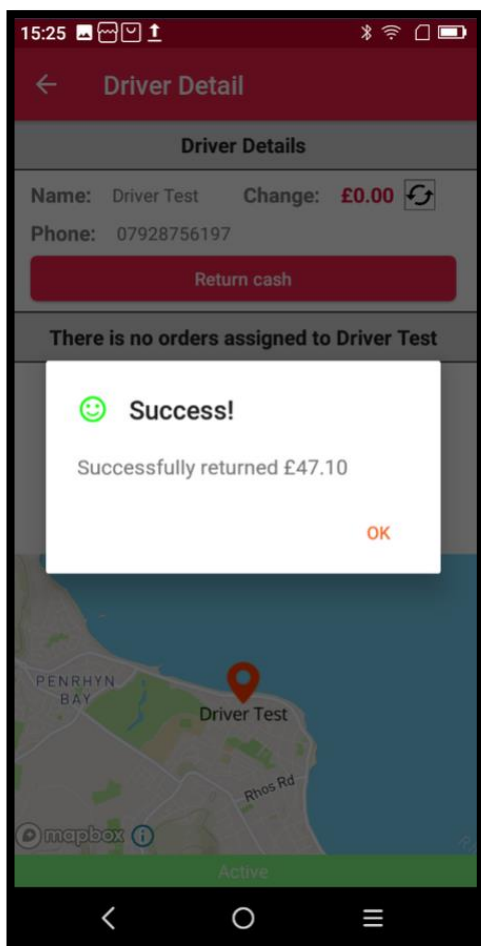


Fig 6.1.5

The system will now display a message confirming the return of the money owed by the Driver.

As you can see in the background, the value now registered against that Driver has changed to £0.00

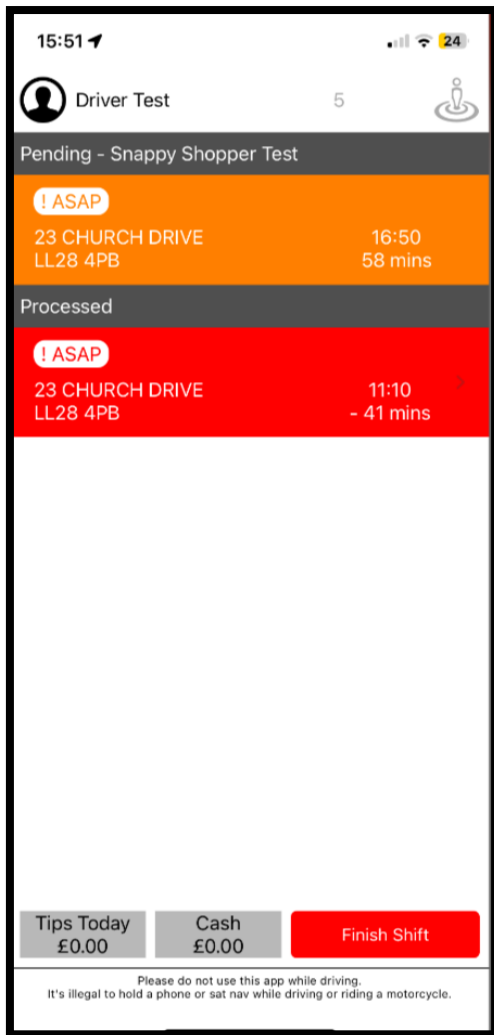


Fig 6.1.6

The Driver app will now update to show the cash owed is now £0.00 and this will allow the Driver to select the **“Finish Shift”** button.

Section 7 – Introduction to the Dispatcher Screen

This section will cover the Dispatcher screen view on the tablet device. This area can be used to see an overview of your orders and drivers.

7.1 - Dispatcher Screen

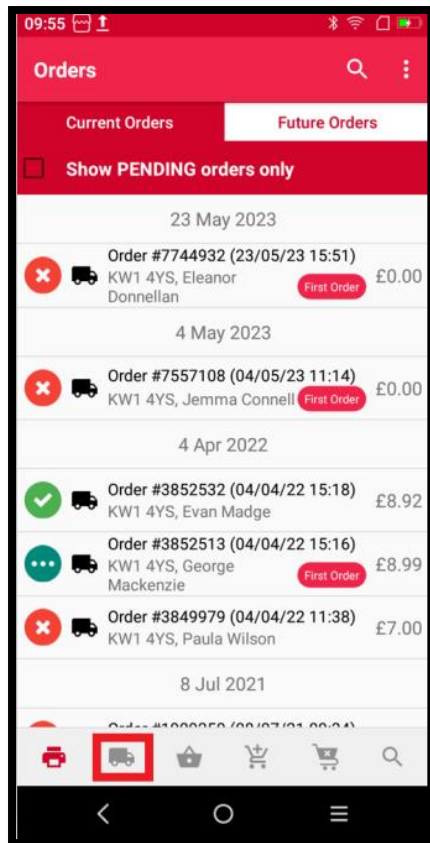


Fig 7.1.1

Click on the “truck” symbol to view the “Dispatcher” screen showing Orders and Drivers.

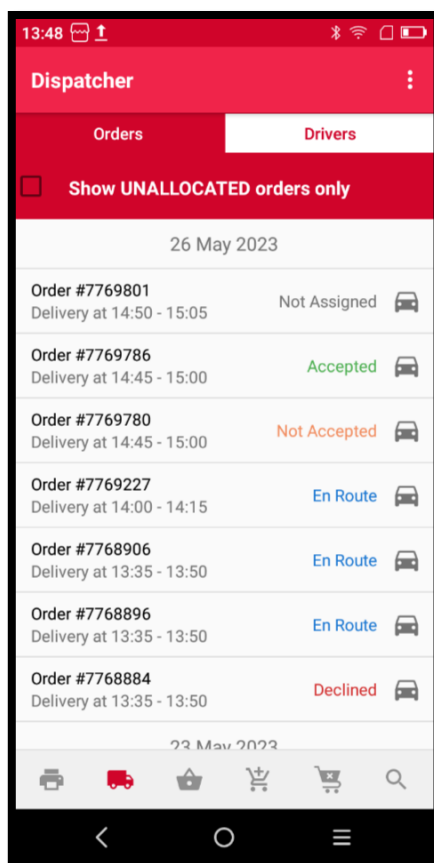


Fig 7.1.2

In this view, you can see the delivery status of all your orders.

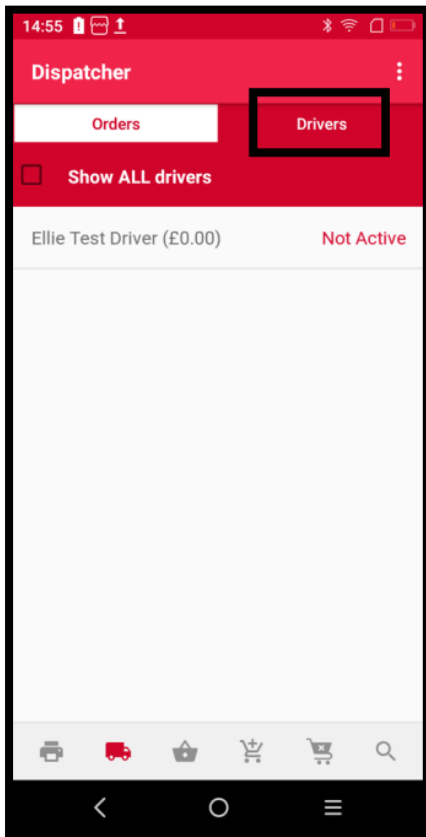


Fig 7.1.3

If you click on the **“Drivers”** button highlighted, you can view the active status of all your Drivers.

A Driver must login to their Driver App account to appear as Active on the Tablet Device.

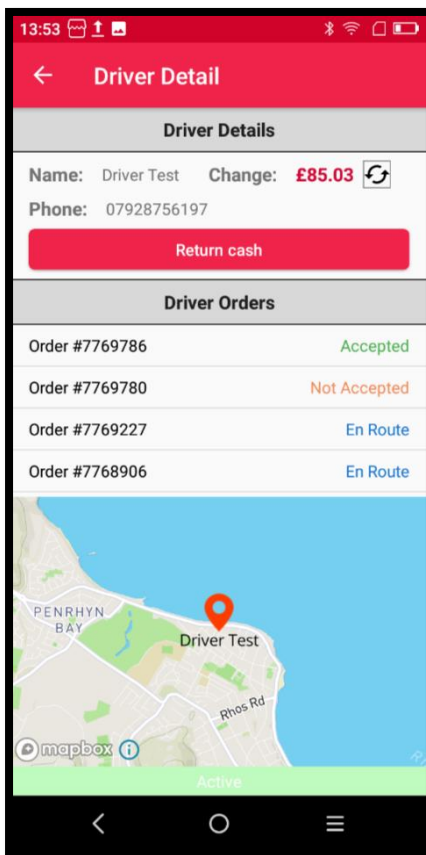


Fig 7.1.4

If you click on the Drivers name as seen in **Fig 7.1.3**, you can view additional details about the Driver; Orders assigned, phone number and how much cash they owe the store when finishing their shift.