

OZEE MARKETS BOOKING MANAGER

User Guide to Manage your Markets Online



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1.INTRODUCTION

As a Market Organiser you will find Ozee Markets Booking Manager much easier and straight-forward to use with all the necessary features and functionality.

Ozee Markets Booking Manager helps you save time by eliminating the burden of paperwork and creates an organized markets management and booking confirmation system.

2.GLOSSARY

- **A. Market Organiser**: They are the managers and key administrators for the markets, who rent out stall locations, enforce rules, manage payments and keep records.
- **B. Market Sub-Admin**: These are the market assistance and coordinators that help the Market Organiser with the management and administration of the markets.
- **C. Stallholders:** Business and vendors who are looking for a market stall to sell their products.
- **D. Verification Code:** This is sent to you to confirm your contact details during registration.



- **D**. **Markets**: These are markets uploaded and managed by the market organisers.
- **E. Real-time availability**: You can distinguish the stall availability by a color indicator on the market stall map or layout.
- **F. Market Map**: this is the layout of the market to check the availability of stalls in the market.
- **G. Transaction ID**: Every stall order request has a transaction number that is unique.
- **H. Transaction Status**: The colored flags for the stall booking transaction/payments are for your easy reference. It is your responsibility as the market organiser to approve or reject the booking transaction. There are 3 status indicators:
- Pending This is indicated in yellow, until the booking transaction/payment is accepted.
- Completed This is indicated in green, after the booking transaction/payment has been accepted.
- Rejected

 This is indicated in red, when the booking transaction/payment is rejected. If the transaction is rejected the payment will be automatically refunded to the prospective Stallholder
- Cancelled
 This is indicated in red, when the booking transaction/payment is cancelled. This flag is used when a transaction was previously Accepted and the transaction subsequently.



cancelled after the acceptance the payment will be automatically refunded to the Stallholder

3. MARKET INTRODUCTION

Ozee Markets Booking Manager will manage all your market and Stallholder data. This application automates all aspects of market stall management from stall availability, descriptions, booked stalls, stall pricing, stall bookings, payments and schedules. Market stall bookings can be managed and reported including market day booking listings to check stallholders and stall positions during the market.

Note: Please Login and Manage your market through desktop version for better experience.

Step 1: Visit Ozee Markets Booking Manager at

https://www.ozeemarkets.com.au

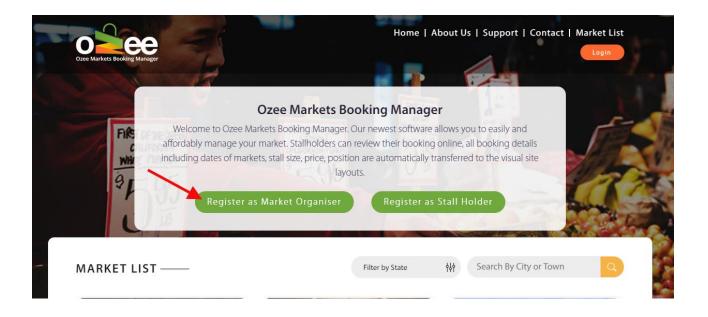
Step 2: Proceed to 3.1 New Registration if you are a new organiser or skip to 3.2 if you are already registered.

3.1 New Registration

Step 1: The website will open in your web browser, and you will view the options for registering as either a:

- Market Organiser Manages and organises the market event days
- Stallholder Books a stall as a vendor to sell products in the markets



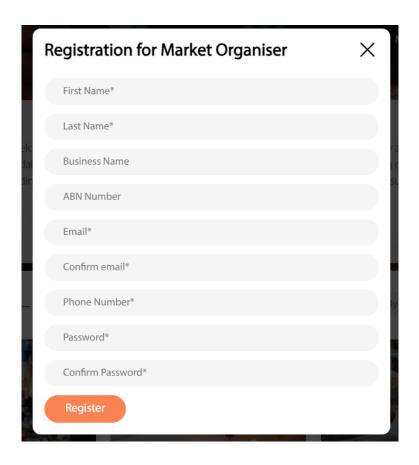


Step 2: Click Register as a Market Organiser

Step 3: Please complete the web form with your personal and business information like First Name, Last Name, Business Name, ABN Number, Email Address, contact Phone Number, and set-up your own Password.

[Note: All information on the form is mandatory except for the Business Name and ABN Number which you can add later if this information is not yet available. You can update this later].

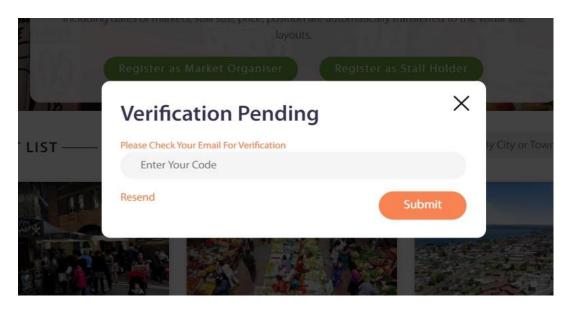




Please note:

- The web form uses Google reCAPTCHAv3 against SPAM submissions bots
- Step 4: Once the registration form is complete, click Register.
- Step 5: You will see the image below pop-up on your screen asking for verification code.





Step 6: Go to your email inbox and wait for your Market Organiser Verification Code Email with your code. Enter your verification code on the Verification Pending Pop-up as displayed above and click Submit. After successfully verifying your email, you will receive your account registration details. Now you are ready to use the system!

Step 7: If you had already closed your web browser before you received the verification code. Simple go to https://www.ozeemarkets.com.au/, click on the orange Login button, enter your registered email address, the password your created and the verification pop-up will open where you can input your verification code to complete your Market Organiser registration.





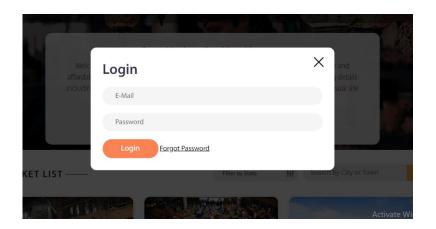




3.2 Login

Step 1: Now that you have registered as a market organiser on the system, please log in to your account using your registered email and password.

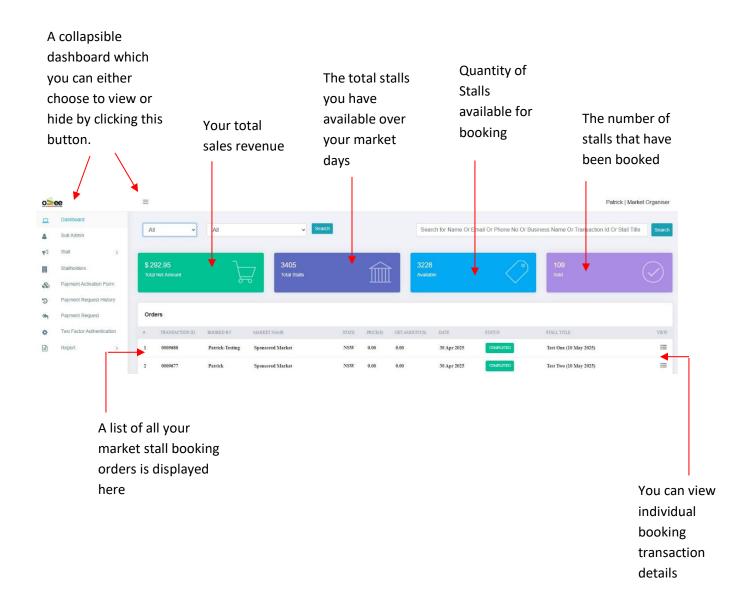
Step 2: And click Login.





3.3 Interface

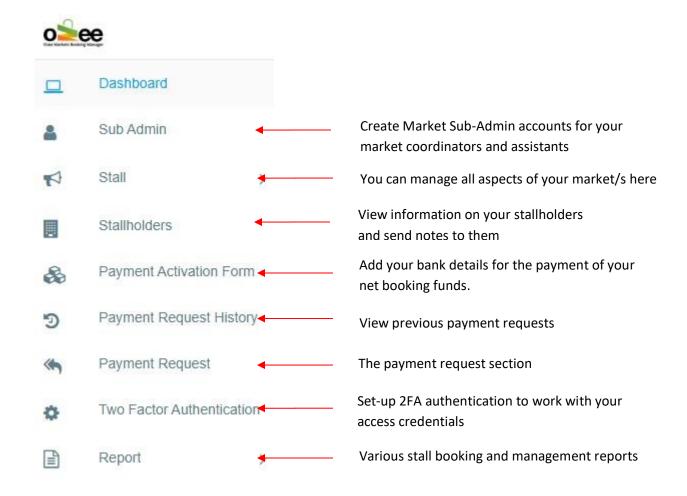
This is the admin console that will be displayed after you are logged in.





3.4 Navigation Menu

This is the collapsible menu from where you have access to all the management sections.





4. MARKET MANAGEMENT DASHBOARD

4.1 Order summary view

This section will help you understand the reporting dashboard to help manage your market/s.

Total Net Amount (sales): The total net sales revenue you accumulated for the period

Total Stalls: The total stalls you have for the market/s for the scheduled published market calendar.

For Example: When you have Stall 1 open for two different weekend market dates, the number of stalls reported is counted as two.

Available: The number of stalls still available for booking.

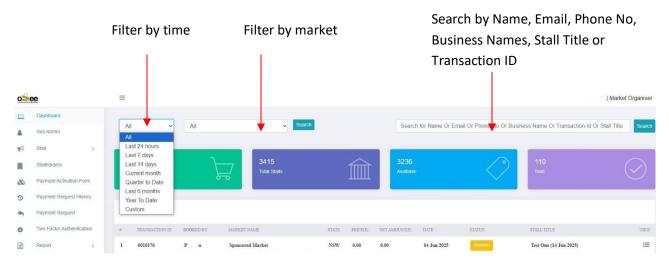
For Example: When you have a stall open for two different dates, and the stall on the first date is sold or the date has passed; the available stall will be one.

Available Stalls = Total Stalls - Booked (Sold) stalls

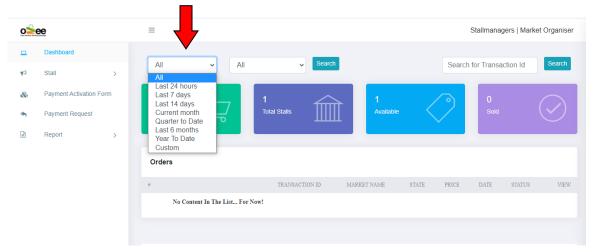
Sold: The number of stalls that have been booked and paid for online including any administrative assigned as sold from offline payments.



Step 1: You can view the dashboard booking statistics. Use the filter to drill down into your booking statistics.



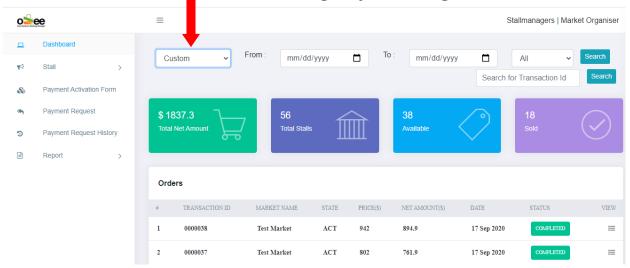
Filter by time period



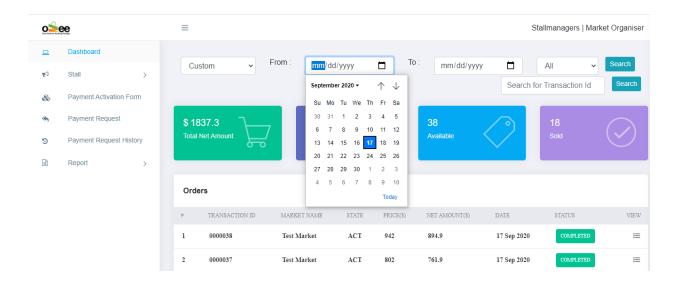
This will Show you only the orders that were placed in that specific time frame.





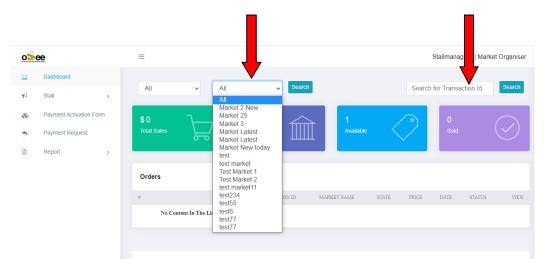


Select a start date and an end date from the calender and hit Search.





Filter by markets (if you are managing more than one market under the same Market Organiser crendentials). You can search for specific booking transactions by searching by either the Name, Email, Phone No, Business Names, Stall Title or Transaction ID.



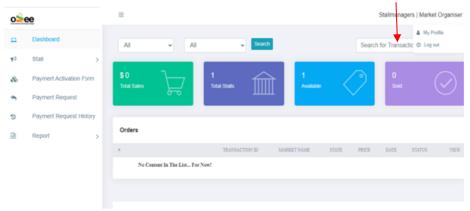
Then Click Search.



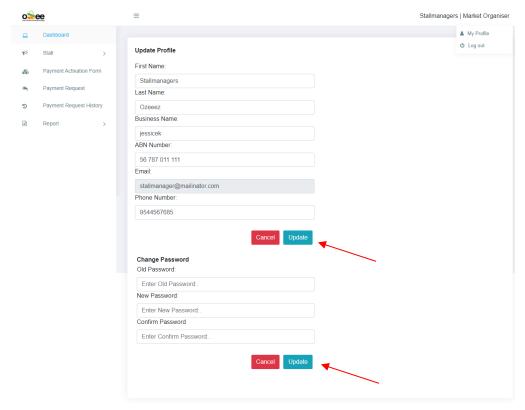
5. MANAGE YOUR PROFILE

You can edit your Market Organiser account profile details anytime you want from the dashboard itself.

Step 1: Click on your username.



Step 2: Click My Profile.





Step 3: Update or complete your profile details and click Update.

Step 4: Likewise, you can change and update your old password with a new password after clicking update.

Note: Only the Market Organiser credentials have access to the organisation's bank account and payment transfer requests. See <u>User</u> Guide to Market Organiser Payment Requests for details.



5.1 Two-Factor-Verification

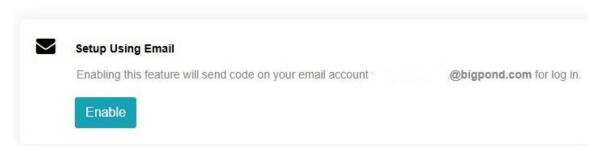


As an additional security option, we offer Two Factor Authentication for Market Organiser and Market Sub Amin access.

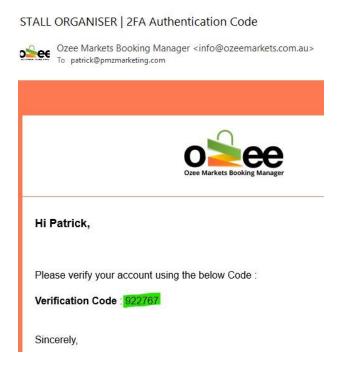


To enable the 2FA security, simply click on the 'Two Factor Authentication' at the left-hand vertical navigation menu.

Two-Factor Authentication



After which click on 'Enable'. Next time you login with your email address and password credentials you will be challenged to provide the 2FA verification code which is sent to your registered email address. Please check your email inbox for the verification code email and click enter to complete your secured admin login.



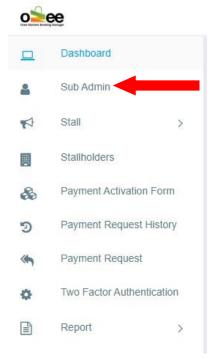


6. ASSIGN MARKET ADMINISTRATION ASSISTANTS

You can add and create additional login credentials for market Administration assistants.

6.1 Add/Create a Market Sub-Admin login credentials

Goto the left navigation item 'Sub-Admin' to create the new administration account.



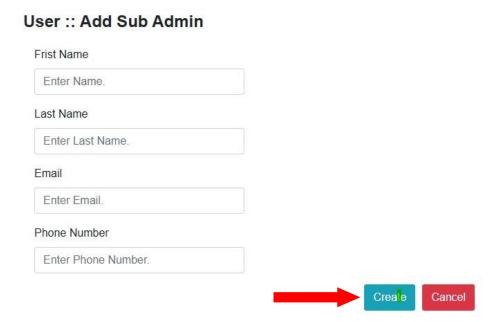
At the Sub-Admin Listing page, click on the 'Add New Sub-Admin. Note:

Any sub-admin no longer with the organisation must be deleted by using the Trash Can icon under the Manage column to the right of their name.





Enter the name details for your Market Sub-Administrator or Coordinator inclusive their unique contact details. Note: The email address must not have been registered previously as an existing user on Ozee Markets.



6.2 Add/Create Market Support login credentials

The Market Support login credentials will have a limited and restricted functionality specifically working with the 'Preview' layout. (Note: Not available for all listed markets)

Goto the left navigation item 'Market Support' to create the new limited market support account and at the Market Support Listing page, click on the 'Add New Market Support'.

Note: Any market support no longer with the organisation must be deleted by using the Trash Can icon under the Manage column to the right of their name.



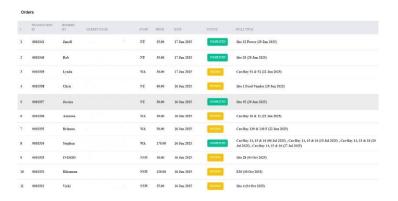
7. MANAGE STALL BOOKING TRANSACTIONS

Management of your stall booking order requests and transactions are always performed when you login as a Market Organiser or Market Sub-Admin. The automated email notifications for stall order requests emailed to your registered email address are only to prompt to you that stall booking order requests have been received and are pending attention.

As each Market listed has its own set of operational procedures in use, the frequently that you login to perform these functions are guided by your own market operations. We do recommend that at least once a week during a designated time and day of the week should be sufficient for market frequencies of monthly, quarterly or annually. For weekly markets these would most likely be performed daily.

7.1 Process stall booking transactions received

Log into your account using your admin credentials. View the complete listing of all your market stall bookings with the transaction status to guide you on the transaction bookings requiring your attention.

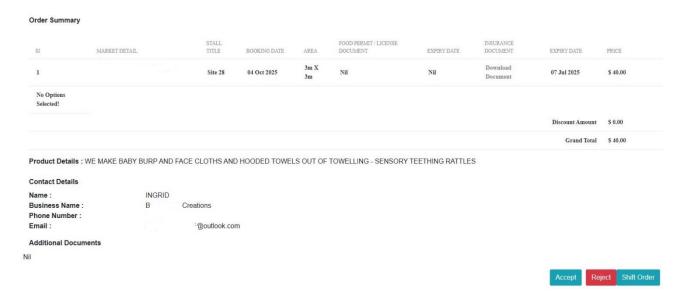




To process the pending booking transactions, click on the three-dot-bar icon on the right-hand side column under 'View'.



This action will open the complete details for both the stallholder and the stall booking transaction for review, approval or rejection. All the information that is needed to decide on the stall booking is visible for review under a unique order transaction number generated by the stall booking system (ie. **Order No**:: **0010333**).





This action will open the complete details for both the stallholder and the stall booking details for Market Administrative review leading to either an approval or rejection of the booking. The details from this view are as follows:

- Unique Transaction Order Number for reference
- Contact Details:
 - o Name
 - Business Name (if supplied)
 - Phone Number
 - Email Address
- Stall Booking Details
 - Booking Date/s (if multiple dates included in the order)
 - Stall Title/s (Stall Name/s) for the booking
 - Insurance Document & Expiry Date [Note: Clicking on 'Download Document' will allow the administrator to view/download/print the document submitted to check compliance]
 - Food Permit/License Document & Expiry Date [Note: If the Stall Category is food related uploading will have been required during booking. Clicking on 'Download Document' will allow the administrator to view/download/print the document submitted to check compliance]
 - Product Details during the stall booking process the stallholder is required to provide information on the products they will be offering at the market



 Additional Documents [Note: Clicking on 'Document Name' will allow the administrator to view/download/print the document submitted per the requirements of the market organiser]

Price Details:

- Stall price rates paid
- Discounts applied
- Optional items included in the order and price rates paid
- Total amount paid

Based on your own management and market operational criteria from view the above information, proceed to Step1 below.

Step 1: Approve the stall booking order request

If all details comply with your market rules and operational requirements, proceed to approve and accept the stall booking order request. Click on 'Accept' and the transaction is Completed. An automated email with the transaction number will be sent to the stallholder to confirm acceptance of their stall booking.

After the acceptance of the booking transaction two functions will appear that can act on the accepted transaction, these are 'Cancel Order' and 'Shift Order'. We will discuss both functions later in this section.

Reject

Shift Order





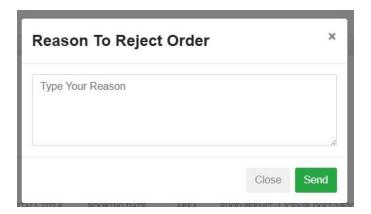
Step 2: Reject the stall booking order request

If the stallholder has failed to comply with the market rules (ie. Submission of their insurance currency certificate and/or food permit/license) their booking must be rejected. Likewise, operationally your market may not accept certain products for sale at the market, and this would also trigger an order rejection.

To reject an order, click on 'Reject Order'. [Note: Once an order has been rejected it cannot be recalled or reversed]



A small window will open to allow you to enter the reason for the rejection. This note will be sent to the stallholder with the order transaction number. If they had a deficiency in their original order, it would give them the opportunity to remedy and rebook an available stall for your approval and acceptance. If for whatever operational reason they are not acceptable for trading in your market, you will have the opportunity to explain the situation to them through this note.





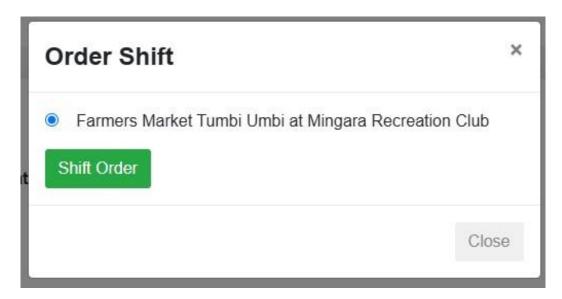
When you click 'Send' an automated email will be sent to the stallholder with your note message

Step 3: Shift an accepted booked stall position to another spot on the same market date or a future market date

Select the stall transaction and click on view details icon as below:



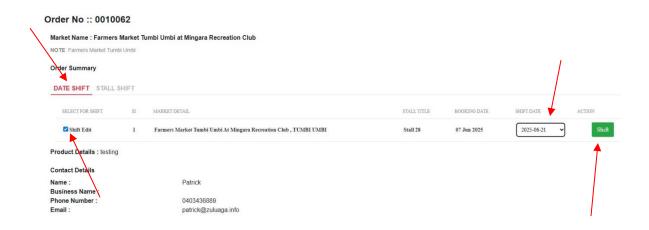
Next click on 'Shift Order' on the detailed transaction page. On the popup select your Market for the Shift Order movement.



Two options for shifting will be displayed: (1) Date Shift and (2) Stall Shift.

The most common Shift movement is the 'Date Shift'. This assumes that the shift will be for the same available Stall Title/Name or position that is available for a future date.

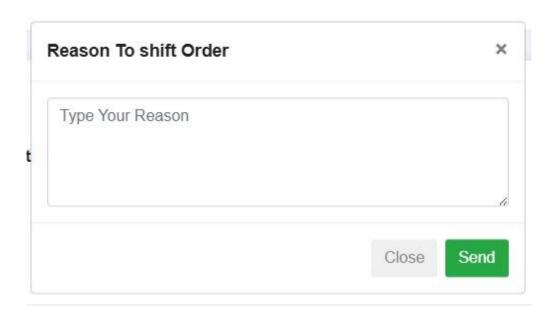




Date Shift Steps:

- 1. Ensure that the selected tab is 'Date Shift'
- 2. Click on 'Edit Shift'
- 3. Select the future date from the 'Shift' Date drop down [Note: if the stall name is already booked for a future date, it will not appear on the list only future dates with that Stall Title/Name position available will appear in the drop down]
- 4. Click the green 'Shift' action button and a note window will open to allow you to provide information related to the move. When you click 'Send' an automated email will be sent to the stallholder with your note message





5. The records for the Stallholder's booking records will be updated to reflect the shift date completed.

The above shift operations are normally used for the following situations:

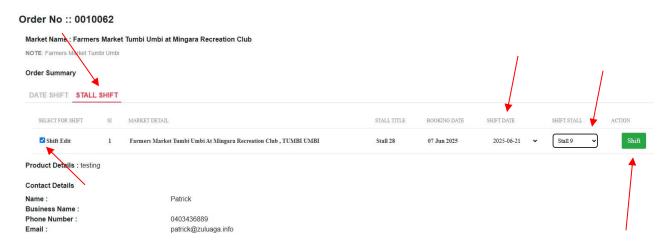
- When you approve a request from a stallholder that their booking be transferred to a future date
- When a market event was cancelled for a weather event or any other reason – all stall bookings are transferred to another future market date
- When a stall booking is acceptable to participate in your market however you have more that enough of the product range for the market date booked



The most comprehensive Shift movement is the 'Stall Shift'. This function will allow Stall Title/Name or stall position shifting to the same market date at a different stall position and at a future market date at a different stall position. [Note: If you run several Markets under one Market Organiser account, it is possible to transfer a stall booking form one market to another market – contact Ozee Markets at info@ozeemarkets.com.au or on 0403 436 889 for more information]

Stall Shift Steps:

- Ensure that the selected tab is 'Stall Shift'
- 2. Click on 'Edit Shift'
- 3. Select the market date from the 'Shift Date' drop down for the Shift action to take place [Note: shift action can be for the same market date as the original booking to transfer to another stall site]
- 4. Select from the 'Shift Stall' drop down and available stall [Note: if the stall name is already booked for the selected market date, it will not appear on the list only Stall Title/Name positions that are available will appear in the drop down]





5. Click the green 'Shift' action button and a note window will open to allow you to provide information related to the move. When you click 'Send' an automated email will be sent to the stallholder with your note message.



6. The records for the Stallholder's booking records will be updated to reflect the shift date completed.

The above shift operations are normally used for the following situations:

- When you approve a request from a stallholder that their booking be transferred to another available stall site on the same market date
- When a market event was cancelled for a weather event or any other reason – all stall bookings are transferred to another future market date at available stall sites
- When a stall booking is requested that their booking be transferred to another of your listed markets



Step 4: Cancel a previously accepted stall booking transaction

If your market operational rules allow a stallholder to have their stall booking cancelled (Normally we recommend asking the stallholder if they can make a future market date – if so, perform a 'Shift Stall' function to more their booking to a future market date that they can attend) otherwise use the 'Cancel Order' function.

To cancel an order, click on 'Cancel Order'. [Note: Once an order has been cancelled it cannot be recalled or reversed]



A small window will open to allow you to enter the reason for the cancellation. This note will be sent to the stallholder with the order transaction number. You will have the opportunity to explain the cancellation situation to them through this note. When you click 'Send' an automated email will be sent to the stallholder with your note message.

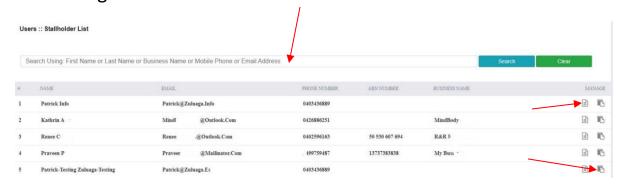




7.2 Stallholder Information and Management



To view stallholder information, click 'Stallholders' on the left-hand vertical navigation menu.



You can search for a stallholder by viewing the listed pages displayed (20x stallholders per page) or performing a search function by either the First Name, Last Name, Business Name, Mobile Phone or Email Address.

Click on the 'Documents' icon to open the current and historical documents submitted by the stallholder (Insurance Currency Certificate and Food Permit/License). You can download the document for your records or viewing.

Likewise, if you wish to send or to view any note messages previously sent to the stallholder click on the 'Note Folder' icon.





To send a new note message to the stallholder click on 'Add New Note'. Enter your message and click 'Submit'. This will send an email to the stallholder white similar email copies of the message will also be sent to the market's organiser, sub-administrator and assistants.

Note: Your note will I	be emailed directly to the stallho	lder's email address for	informational and recording	g purposes
Write your note here	<u> </u>			
Submit Back				

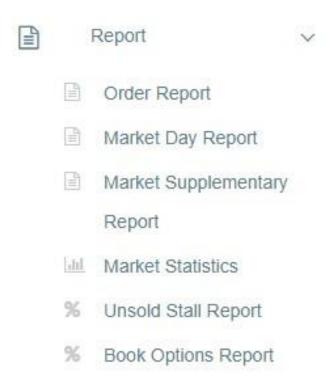


8. MANAGEMENT REPORTS

The detailed reports available contain all the management and accounting information at transaction levels necessary for the stall bookings accepted, the net revenue collected and quantity of stall bookings with optional items booked and paid over the define period for the reports.

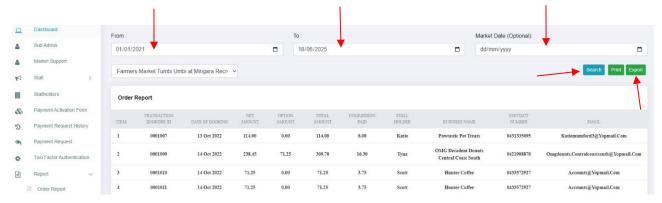
Other management reports are developed for the market day operations to verify stallholders at their stall positions with all the requisite information to determine if the stallholders have the necessary approvals and documentation to trade.

Here are the reports available on the left navigation menu:



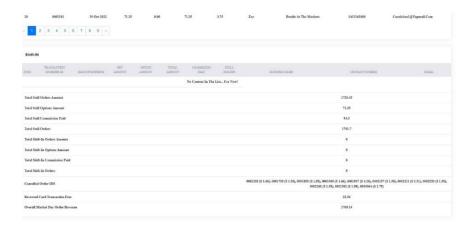


- Order Report (Financial information for the time period selected)
- Step 1: You will see a drop-down under Reports. Click Order Report.
- Step 2: You can filter by a time range and by market.



Step 3: Select the period or time range desired for the report

- Step 4: Select the market from the drop down (if more than one market)
- Step 5: Click Search. [Note: the report can be run for any market date]
- Step 6: Now you can see the order details. At the bottom of the report, you will see any stall bookings that have been 'shifted' in that time range including any credit card fees applicable.

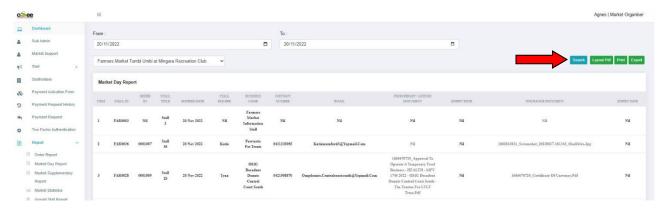


The Order Report is viewable online, available to print or export in Excel format.



Market Day Report (Detailed info on stallholders & stalls booked)

Step 1: Click on the Market Day Report



Step 2: Select the date for the market.

Step 3: Select the market and hit search

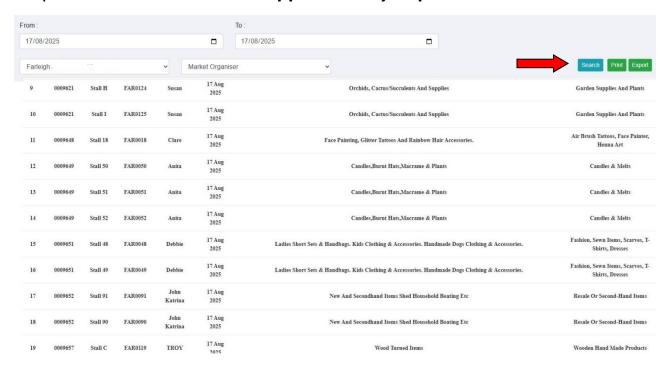
The Market Day Report is viewable online, available to print or export in Excel format.

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Market Supplementary Report (Add'n Info on Stallholder products)

Step 1: Click on the Market Supplementary Report



Step 2: Select the date for the market.

Step 3: Select the market, Market Organiser and hit search

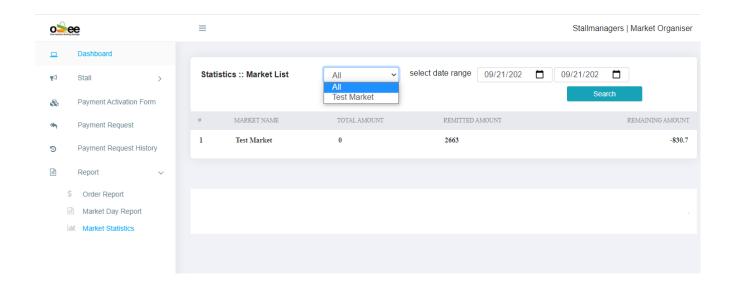
The report includes product description information submitted during the stall booking process and the previously selected stall product categories at the time of their stallholder registration.

It is also possible to search for specific details on a stallholder booking for the selected market date.

The Market Supplementary Report is viewable online, available to print or export in Excel format.



Market Statistics

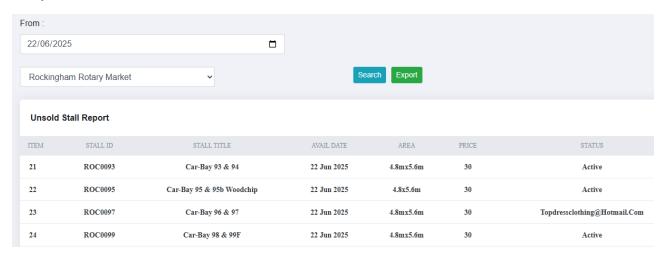


- Step 1: Select the period or time range
- Step 2: Select the market from the drop down
- Step 3: Click Search.

This report will provide a comparison of financial amounts for different markets that are managed under one Market Organiser account. Not relevant if only one market is listed.



- Unsold Stall Report (To identify stalls that remain unsold)
- Step 1: Select the forthcoming market date
- Step 2: Select the market from the drop down
- Step 3: Click Search.

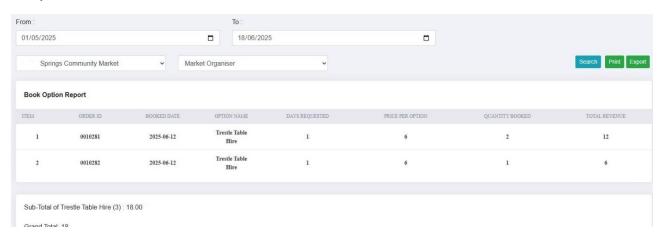


This report identifies stalls that remain available for a coming market date. It also lists the email address of any 'Reserved' stalls for regular and permanent stallholders that have not paid for their stall at the time you run the report. This report could be used for promotional efforts and if on the day drive in stallholders is allowed, this could be used to allocate available stalls.

The Unsold report is viewable online, available to print or export in Excel format.



- Booked Options Stall Report (Detailed report for options taken up)
- Step 1: Select the period or time range
- Step 2: Select the market from the drop down
- Step 3: Click Search.



The report includes information on options that have been hired/booked for the period selected. [Note: If your market is offering day cover insurance, reviewing how many times the day insurance was taken up can allow some negotiation on the addition premium for this offer to be available on your own insurance agreement.]

It is also possible to search for specific details on a stallholder booking for the selected market date.

The Booked Options Report is viewable online, available to print or export in Excel format