Marketplace for Store Managers

Store Access

1. Log in at https://app.riskandsafety.com
2. From the RSS homepage, select **Programs** in the top menu
3. Select a store

Managing Store Settings

Store Managers can manage and update store settings.

1. From the store homepage, select **Manage Store Settings**
2. Select the round pencil button at the bottom of the "Detail" tab and fill out the required fields
    - General:
        i. *Name:* Create a name for the store
        ii. *Description:* Enter a description to be displayed to end users
        iii. *Open/Close:* Add the store hours of operation
    - Catalogs: Marketplace allows the sale of Chemicals, Services, and Supplies
        i. *Catalog:* Select the type of products
            - To add additional catalogs, select the plus sign to the top right of the "Catalogs" header (Max: 3 catalogs)
        ii. *Purpose Code*: Enter the purpose code associated to the products
        iii. *Markup Percentage*: Enter in any markups associated with the Catalog
        iv. *Sales Tax:* Enter in the sales tax associated with the store
    - *Enable Storefront:* When enabled, users associated to accounts will be able to place an order through the online store
    - Order Settings
        i. Set order settings for delivery, pickup, and self-checkout. (**Note**: The URL for self-checkout is available after saving.)
    - Fund: Enter in the required fields (i.e., Fund Type, Business Unit, Account)
    - Contact: Enter in the "Address", "Telephone", and "Email" information to be displayed on the storefront
3. Select **Save** in the top right corner

Manage Locations

Store Managers can add locations and sublocations and designate specific areas where products will be stored.

1. From the “Manage Store Settings” page, select the **Locations** tab
2. Select the round + button in the bottom right corner
3. Fill in the required fields (Building, Room, Name)
   - *Search Building:* Search for the specific building where the store is located
   - *Search Room:* Search for the specific room
   - *Name:* Create a name for the specific location within the building/room where the product will be housed (a location can be a specific location in your store such as a shelf, a fridge, a bench, etc.)
4. Select **Save**

Managing Store Products

Adding a Product

This step adds a product to your total assortment of catalogue items. It does not add quantity. See the next section “Adding Stock to Product” to add quantity.

1. From store homepage, select **Add Product and Stock**
2. Select the round + button in the bottom right corner
3. Select the intended “Catalog” and input the required fields (*):
   - If you choose Chemical*:*
     i. In the “Search Chemical” field, search for a chemical by CAS, name, GHS, or product number
     ii. Select the chemical
     iii. Then, enter the “Container Size”, “Units”, and “Container Type”
     iv. *Name:* Input the name of the product that will be displayed in the store for users
     v. *Product Number*: Product or SKU number associated with product
     vi. Indicate if a barcode is required
     vii. *Description*: Create a description of the product
   - *Price*: Input the price of the product
   - *Fee*: Input a fee, if any, associated with the product
   - *Subsidy*: Input the subsidy amount, if any
   - *Low stock threshold*: Input a quantity to indicate low stock
   - *Tax Exempt:* Select whether the item is tax exempt or not
   - *Available for Sale*: Toggle this on when you are ready to start selling the item
4. Select **Save** at the top right of the page

Suppressing a Product

Managers can make products unavailable for purchase if the need arises without adjusting quantity.

1. From the store homepage, select **Add Product and Stock**
2. Search for the product and select it
3. Select the three-dot menu in the lower right corner, and select the pencil icon
4. Scroll to “Available for Sale” and toggle it off
5. Select **Save**

Note: This makes the product unsearchable in the store. It can be made searchable again by toggling on “Available for Sale”.

Adding Stock to Product

1. From the store homepage, select **Add Product and Stock**
2. Search for the product and select it
3. Select the **Stock** tab
4. Select the round + button at the bottom of the page
    - Section 1: Select the Room and Sublocation where the chemical containers will be housed
    - Section 2: Scan container barcodes into the system. If there are more than one item, continue to scan all items before saving
5. Select **Save**

Note: Products low on stock are indicated at the top of the store homepage and can be accessed by selecting the **Products low on stock** card.

Setting up Purchasing Accounts

Adding a Fund

1. To add a fund, select the round, three-dot menu in the bottom right and select **Add Fund**
2. Fill out the required fields (*)
3. Select the toggle next to “Default” to make this the default payment method
4. Select **Save**

Adding a Delivery/Transfer Location

1. To add delivery/transfer location(s), select the round, three-dot menu in the bottom right and select **Add Location**
   - **Note**: Sublocations for your Chemical Inventory must be setup in Chemicals prior to setting up the fund account
2. Input the required fields (*)
3. Select the toggle next to “Default” to make this the default delivery location
4. Select **Save**

Processing New Orders

Store Managers and Staff can process new orders as they are submitted.

1. From the store homepage, select **Pending Orders** from the top of the page
2. Select the order you want to process
3. From the right-hand options, select **Fulfill Order**:
   - Using the scanner, scan the barcodes of all products
   - Select **Fulfill Order** at the top right
4. Once the order has been processed and delivered, mark the order as ‘Delivered’ or ‘Picked Up’ by selecting the corresponding card, **Ready for Pickup** or **Ready for Delivery**, at the top of the store homepage.
5. Orders can also be accessed from **Order History** from the store homepage
   - Choose the order, and select **Delivered** or **Picked Up**

Store Checkout

Store staff checkout on behalf of inventory

1. From the store homepage, select **Checkout**
2. Scan the barcode(s) of the items being purchased
3. Select **Checkout** at the bottom right

View Order History

1. From the store homepage, select **Order History**
2. Select the down arrow to the right of the search bar to filter search by “Order Status” or date range. Then, select **Filter**
3. Select an order to view order information

View/Download Transactions

1. From the store homepage, select **View Transactions**
2. Select the down arrow to the right of the search bar to filter search by date range. Then, select **Filter**
3. Select **Download Excel** and/or **Download Journal** to export the transactions to a document