Intrabiz User Manual

For NNS Coordinators

Contents

You can also look at the help manual for NNS set-up on Babble:

https://babble.nct.org.uk/sites/default/files/resources/Online%20NNS%20Seller%20Functionality%20V2%20KC.pdf

Introduction

This user manual is designed to help use Intrabiz for the setting up and administration of Nearly New Sales (NNS) in your NCT branch.

The Intrabiz system is used for both types of Sales, Table Top Sales (you sell tables for sellers to use to sell their own stuff) as well as Ticketed Sales (you sell the goods and the sellers receive a share of the proceeds).

The Intrabiz Nearly New Sale module has the following functions:

- Online seller registration
- Online payment of registration fees or table bookings
- Automatic distribution of seller numbers
- Online booking and payment of advertising leaflets or stalls for your Sale
- Registration for helpers at the Sale
- Creation of a helper schedule for the Nearly New Sale coordinator
- Calculation of share amounts
- Instant BACS payment of share amounts

How to get things done

Please make sure that you have your own Intrabiz log-in as “NNS Coordinator”. Don’t make entries under another person’s log-in. Your branch treasurer can set you up accordingly. If you have Intrabiz access for more than one role, please make sure you switch to the “NNS Coordinator” role with the drop-down list under your name in the top right hand corner of the page before you make any entries relating to your Nearly New Sale.

In general, you navigate on Intrabiz by clicking either on a menu item on the left hand panel (on the dark green background), the ⓘ icon, the ➤ icon or on an underlined item.

Don’t worry about making mistakes. There is always a way to undo or change anything. If something went wrong and you don’t know how to fix it, please don’t hesitate to contact Nicola or Régine at Intrabiz by clicking on their underlined names on your EVENTS page.

Title bar

On the title bar you will see the NCT logo on the left-hand-side, your name on the right-hand-side and the name of your branch in the middle. Underneath the name of your branch is the quarter you are working in and double arrows on each side which allow you to move to a previous or subsequent quarter. Hovering your mouse over the Quarter field will show you the time period which is covered by that quarter. Between the name of your branch and your name, there are 3 buttons:

- The Home button is the first page you get to when you log onto the system. This is also the EVENTS page. [News and system down-time are posted here when necessary. This is also where you have an email link for Nicola and Régine who are your system's support.] If you are navigating into past quarters, the Home button is the quickest way of bringing you back into the current quarter
- The Print button will give you a print of the page on the screen (dependent of course of your computer being linked to a printer).
- The Help button gives you access to this User Manual.

Left Hand Menu

EVENTS

This is where your future and maybe also your most recent branch Nearly New Sales are listed. You may see a list of Sales already set up on the system by your predecessor or treasurer. You can add all future Sales that you are aware of happening even if they are a few quarters into the future. This process will be explained in detail below.

VOLUNTEERS

This is where you can see a list of branch volunteers with the roles they hold on Intrabiz and the number of members in the branch is displayed. This list is administered and kept up to date by your branch treasurer.

NNS SELLERS

This list of Nearly New Sale sellers is generated automatically from all previous online registrations. You can search for a specific seller or leave the search field empty and click the Enter key on your keyboard to see the complete list of sellers.

CHANGE PASSWORD

The password first given to you to log into Intrabiz is automatically generated. You can change this to something more memorable at any time.

LOGOFF

This will log you out of the system.

Setting up a Nearly New Sale

On the EVENTS/Home screen select the 'Add a new sale' action and fill in the form. You can add all the sales that you know about that are not already in the list. Select the type of sale you are creating, Ticketed or Table Top. Choose a sensible name that will distinguish the event in drop-down selection lists (e.g. 'Nearly New Sale Autumn 2016'). The 'Date' should be when the event is due to be held. Be aware that the Name for the Sale which you enter here will be displayed in all the future links and communications, so please avoid abbreviations and spelling mistakes.

In the Coordinator field choose your own name from the drop-down list, or for branches with more than one NNS Coordinator, please select the person coordinating this particular sale.

Then, click “Go” next to ‘Add this new event’.

For Ticketed Sales

On the next screen, you will now see the event details that you have entered so far, your branch’s Seller Number Policy and an underlined Seller Registration Link.

The **Seller number policy** states whether sellers are allocated new numbers for each Sale or whether they can keep the same number they have had before for subsequent sales. When you set up your fist sale, this policy defaults to “Compact” which means sellers are given new numbers starting with 1 at each sale. This policy needs to be set by Intrabiz staff so please contact Nicola or Régine to discuss your options and to change your current setting.

The underlined **Seller registration link** is what you will use to in your publicity of your sale, this should be copied and pasted into emails, onto your branch website, facebook page etc.

You can click on this link at any time to see the information potential sellers would see if they were to register at this point.

Underneath the Seller Registration Link, you have a number of **Possible Actions.**

In order to add more information about your Sale, click on the arrow next to 'Modify the event details'. In this form you can limit the number of sellers that you allow in your Sale (if you wish), enter the amount of registration fee (if you have one) and your Sales commission which sellers have to pay on their total sales. This is most commonly 30%, but your committee can discuss your own rate. If you have different commission rates for volunteers who help with the Sale, you will have the chance to enter this at a later point (see below, page 12).

Click "Go" next to 'Save these modified details'.

Another **Possible Action** is 'View the seller registration advertising description'. Here, you can add all additional necessary information that needs to be included in the booking link for your potential sellers, for example the venue for the Nearly New Sale, a link to the terms & conditions for the sale, a request for helpers, a little publicity about your branch, other branch events or NCT membership etc. You can also explain the different commission rates available. If you like, we can send you an example of other branch's advertising description so that you get some ideas for contents and wording. Please just email Nicola or Régine to request this.

Once you have entered some text to the advertising description, you can click on the seller registration link to see what it will look like to your potential sellers. You can modify this at any point. Remember that if you have already opened your sale registration, you will have to close it before making any changes.

The same goes for 'View the seller registration confirmation details'. Here you modify the text of the confirmation email that goes out once a seller has registered. The default text will confirm the registration and tell the seller their seller number and commission rate. You could add venue details and timings, details about drop-off and collection of goods, link to print out labels and forms or any other information that you think is important at this stage.

If you wish to sell extra labels as an option at the time of registration, you will need to use the option 'Add a registration add-on'

Once you are happy with your set-up and registration link, you can "Open seller registration". The link will go live.

When you have opened your seller registration, please use the "Advertise to previous sellers" function. That way, previous sellers will be sent a personalised registration link where they won't have to enter their personal details again. They will be able to amend their details if needed and they will be able to go straight to the payment process.

If there are other things to add that need to be pre-booked, like additional labels, stalls, advertising leaflets, large items etc, please read the relevant section below before opening registration.

Please note that any changes to your Sale details, advertising description or confirmation email can only be made while the registration link is not live. Please remember to choose 'Close seller registration' under the **Possible Actions** before attempting any modifications.

For Table Top Sales

Please see procedure for the general set up on page 5 above.

After adding your event, you need to click on the arrow next to 'Go to financials' under the **Possible Actions.** On the next screen you will see the option to 'Sell tickets to this event online'.

The term "ticket" covers everything that is bookable for your event: For other types of events this might be used for entry tickets (for example for a Summer Ball or a Cheeky Monkeys Tea Party), but for your Table Top Sale the tickets are also used to sell tables, table space, display boards, advertising stalls, advertising flyers or anything else you are offering. You need to add a separate ticket type for each of these and for everything that differs in price from the other tickets.

In the Ticket 'Name' section you can specify what each ticket is for, for example "1 regular table". The 'Description' field lets you explain this in more detail, for example "one table and space for one hanging rail for private sales". This would be the case if you didn't provide any rails and if you had different rates for business tables. You could then add a new ticket for business tables or a separate ticket for rail hire or for double spaces ("2 tables") if they are differently priced from two single tables etc.

The 'Price' and 'How many tickets of this type may be sold' sections are straight forward. The last question 'How many people can attend on one ticket of this type?' is only relevant if you are setting up entry tickets for your Sale. Otherwise, please enter a 0 (zero).

Only after you have added your first Ticket will you see some new options under **Possible Actions**. Now, you can 'View ticket sales advertising description'. Here, you can add all additional necessary information that needs to be included in the ticket sales link for your potential sellers and advertisers, for example the venue and timings for the Table Top Sale, a link to the terms & conditions for the sale, a request for helpers, a note for advertisers where to send their leaflets, a little publicity about your branch, other branch events or NCT membership etc. If you like, we can send you an example of other branch's advertising description so that you get some ideas for contents and wording. Please just email Nicola or Régine to request this.

Once you have entered some text to the advertising description, you can click on the Ticket sales link to see what it will look like to your potential customers. You can modify this at any point.

The same goes for 'View the seller registration confirmation details'. Here you modify the text of the confirmation email that goes out once a ticket has been sold. The default text will confirm what has been purchased and how much has been paid. You should add venue details and timings, details about parking, large items, terms & conditions or any other information that you think is important at this stage. As above, we are happy to provide you with some examples to work from.

Once you are happy with your set-up and ticket sales link, you can "Put tickets on sale". The link will go live.

Please note that any changes to your Sale details, advertising description or confirmation email can only be made while the sales link is not live. Please remember to choose 'Take tickets off sale' under the **Possible Actions** before attempting any modifications.

Adding and monitoring resources

If the different ticket types you are selling are available in different combinations but have to be limited, for example sellers can book tables only, rails only, large items only or a combination of any of them, you can monitor this by adding a "resource" to your event. Go to 'Add a resource' under the **Possible Actions** and add how many tables, rails, spaces for large items, advertising spaces etc you have available.

Now, click on the (i) next to each ticket type in turn and under 'Modify the ticket type details' specify which resources are used for each.

The system will now keep track of each of your resources for the sales. For example: Imagine you have 30 tables available and only 20 rails. Your ticket types are set up as selling 'one table', 'one rail', and 'one table plus one rail' at a reduced price. The resources tracker will make sure that if single rails are booked and some table + rail combos are booked, the ticket types will show as being sold out once all rails have gone but tables only are still available.

Selling something extra

This section refers to Ticketed Sales only.

When you are setting up a ticketed Nearly New Sale, you create a seller registration link as described above. You might charge a registration fee which will have to be paid online by sellers in order to register. This is done through the registration link.

You might want to sell something else for your Nearly New Sale, either to your registered sellers (for example extra labels) or to people who are not going to register as sellers (for example an ad for a large item on a display board) or to advertisers who provide leaflets or goodies for your bags or to advertisers who book stalls as a side-show to your sale. There are two different options to do this:

If you want to sell to your sellers *at the point of registration* you would choose the Possible Action **"Add a registration add-on"**. Most commonly this refers to extra labels if the amount of goods that can be sold is limited but can be exceeded at extra cost. The 'registration add-on' will let you add those extra labels at an additional price which would be booked and paid for when a seller registers.

If you offer extra labels at a price, you will have to assume that some sellers won't book these at registration, but would like to acquire these later on in the process. For this, you need to choose **"Sell tickets for this event online"**.

The term "ticket" covers everything that can be pre-booked and paid online for your event: For other types of events this might be used for entry tickets (for example for a Summer Ball or a Cheeky Monkeys Tea Party), but for your Nearly New Sale the "tickets" are used to sell extra labels, a space on a display board, a chance to include advertising flyers in bags or anything else you are offering to people *outside the seller registration*. The Ticket Sale link can be sent to and shared with anyone, whether they are registered sellers or not.

In the form for ticket types, the first question is "How many people may attend this event?" As your ticket will not be an event entry ticket for your NNS, leave this field blank. In the Ticket "Name" section you can specify what each ticket is for, for example "50 extra labels". The "Description" field lets you explain this in more detail for example "extra labels in order to sell additional items". The "Price" and "How many tickets of this type may be sold?" sections are straight forward. The last question "How many people can attend on one ticket of this type?” is only relevant if you are setting up entry tickets for your Sale. Otherwise, please enter a 0 (zero).

Only after you have added your first Ticket will you see some new options under **Possible Actions**. Now, you can “View ticket sales advertising description” and also the “ticket sale confirmation details”. As before for the seller registration link, you can add all additional necessary information that needs to be included in the ticket sales link for your potential sellers and advertisers, for example where to drop off advertising flyers or the general timing of the event.

You need to add a separate ticket type for everything that you want to offer as extra for your sale. At the moment, there is only one Ticket Sales link for all ticket types. If you are, for example, creating a ticket for extra labels for sellers and another for commercial table space for advertisers, the same ticket sale link will be seen by both and you have to address both in your advertising description to make clear what the options are.

Helper registration and scheduling

This option is not available for Table Top Sales, only for Ticketed Sales, as these are usually much more work intensive.

When you have set up a new Ticketed Nearly New Sale you will see ‘Use online helper registration and scheduling’ in the list of Possible Actions on the Seller Registration screen.

[If you cannot see this option it will be because you have opened registration for your Sale already or you have five or more sellers registered already. In this case please email Marcus@intrabiz.co.uk to discuss your options]

You will not be able to (re-) open the seller registration until you have completed the set-up and opened the helper registration. This is because the helper registration now forms part of the seller registration. Likewise, you cannot close helper registration whilst seller registration is open.

The helper registration and scheduling can be used for sellers and non-sellers of your sale. It can cover any volunteers that you need in order to run your sale, for all tasks before, during and after the event. When a seller registers for the sale, they will be asked whether they are willing to volunteer to help at the sale. If they tick this box, they will be asked to continue to helper registration immediately after completing their seller registration. If they fail to complete the helper registration at this point they will automatically be sent reminder emails (with the helper registration link in them) until they either complete the registration or decide not to volunteer after all. The link in the reminder email will be personalised to them so they will not have to re-enter their contact details again.

There will also be a public link for non-sellers to register as helpers. **Please DO NOT SEND the public link to registered sellers**! If you wish to send the reminder email to a seller immediately (rather than wait for the system to do it) then just go to the seller registration and select the “Send helper registration reminder” option. If the seller forgot to volunteer during the seller registration you can manually update their desire to volunteer by using the “Modify the registration details” option and changing the ‘Sale volunteer request’ answer.

In order to contact helpers from previous sales who were not registered sellers, you should use the “Advertise to previous non-seller helpers” option on the helper registration screen. This will present you with a selectable list of all people that registered as helpers at your previous sale without being sellers themselves.

Setting up Sessions

The first page you get to when you choose the helper registration option is the first session set-up. The ‘Short name of session’ will be the name of the time-slot you would like to fill with helpers, for example “Pre-Sale set-up”, “Morning Session” or “After-Sale tidying up”. ‘Sessions’ are defined by their time, not the roles that need to be filled.

The Date field defaults to the day of the sale, but you can use this for any day and time that you need helpers for. Start and End times are those of the session that you are creating. Session times may overlap with each other. In the Description field you can add more information about what sort of tasks you need your helpers for, for example “Setting up and crowd control” or “greeting shoppers, packing, tidying, general supervising , working on tills, selling refreshments” or “setting up rails and sorting clothes” etc.

Once you have added your first session you will see a Helper registration link displayed under your event, above the lists of Possible Actions. Click on this link to see how your session is displayed and to check whether you are happy with the information given in it.

There will now also be a table of Helper Sessions with your first session displayed. You can click on the (i) next to the session in the Helper Sessions table in order to modify the session details or remove it entirely.

You can add more sessions to split the sale into multiple sessions, to add separate set-up and clear-up sessions on the days before and after the sale etc.

To get off the ground as quickly as possible, just add all the sessions that helpers can volunteer for, but leave the detailed roles until later. This will give you a default general 'Helper' role for each session. When the helper registers they will choose which sessions they wish to do. Helpers do not have the option to choose a role. They can choose one or multiple sessions. There is also a field for them to add any information they wish to share about their volunteering, for example that they are heavily pregnant, cannot lift, have worked the tills before etc.

Setting up Roles

In order to develop a detailed helpers schedule for your event, you can add different roles for each session and move your helpers into these roles. Helpers cannot see these roles themselves when they register for a session. To add roles, click on the (i) next to each session in your Helper Session table and choose "Add another role to this session". Now you can add "Till operator", "Till helper", "Large items", "Refreshment stall", "Queue control" etc as your roles and add a maximum number of helpers that you need for each role if need be. You can then move your available helpers into each role and print out a schedule for each session. A schedule for the whole event is currently being developed and will be added soon. You will have a list of registered helpers like you have a list of registered sellers. Here, you can click on the (i) next to each helper and 'Modify the registration details'. On the next screen you can assign a role for each session or even a different session to the one requested - of course this will have to be only after consultation with the helper.

When the helper schedule is ready you can email each helper their personal schedule of which sessions and roles they have been assigned to using the 'Send helper role assignment emails'. This option will only contact the helpers that have not received their up-to-date schedule yet. So you can make changes to the whole schedule and use the send option again to just send an updated schedule to those whose schedule has changed. You can also resend the schedule to an individual helper if needed using the option in their registration. The date the helper was notified of their schedule is shown in the 'Notified' column of the helper registration list.

The sessions and roles in each session will appear in order of entry. If you would like to change the order of listing of each session or role, you have the option to do this when you click on the (i) next to a session in the Helper Sessions table.

After the sale, you can use this 'modify the registration details' screen to adjust the helper registration to the reality of the event, for example if a registered helper did not show up.

If you are offering a **reduced commission rate** to sellers who help at the sale, you can now add this to your event details. Go to Seller Registration and 'Modify the event details'. Once you have added your first helper session you can see that a new field for Helper sales commission has opened up where you can enter the amount of the commission rate sale volunteers have to pay.

In your list of seller registration there is now a column called 'Help'. This will have a 'Yes' for those sellers who have registered as helpers, 'Req' for those sellers who have requested to help when they registered as seller but have not completely their helper registration yet, or nothing if seller has not agreed to help.

Your list of helper registrations contains a column 'Sell' to indicate which helpers are also registered as sellers at the sale.

Official NNS email address

All communication from Intrabiz that relates to your Nearly New Sale, like the confirmation emails, emails to all helpers etc will come to the named NNS Coordinator. NCT strongly encourages you to set up an "official" email address rather than using your volunteers' private contact details.

An email address in the format of "NNS.[*branch name*]@nct.org.uk" can be obtained from NCT IT department. The branch treasurer then needs to enter this on their system on the BRANCH page (➤ Modify the branch details).

Floats

If you need a float for your forthcoming NNS, this needs to be organised by your branch treasurer, ideally two weeks before the event. On the treasurer's Intrabiz site, they need to use the "Withdraw a float" action on their BANK screen.

The requested float amount will be sent by BACS directly into the private account of any of the branch Payment Authorisers. They will then withdraw this and bring it to the sale. If you require a larger amount, it may be advisable to contact the bank beforehand and advise them of the amounts and denominations you will need.

The BACS payments are currently processed once a week on a Friday. It will then take a few days for the money to arrive at the nominated account, so please allow at least 2 weeks for this process.

After the Sale

Once the date of your NNS has passed, you will see the option to "Upload sales figures" under your Possible Actions. You can prepare a spreadsheet in Excel or similar which needs three columns: The seller number, the seller's sales figure (the total amount of goods sold before any commission to NCT is calculated) and a returns figure for each seller if your branch operates a returns policy. This file needs to be saved as .csv file and can be uploaded onto Intrabiz as such.

You can also enter sales figures for each seller individually by clicking on the ⓘ next to their name and choosing 'Modify sales figure'.

The Intrabiz system will then do the rest: Sellers' shares are calculated automatically and you can schedule all BACS payments to be authorised and paid together in two clicks. BACS payments are processed each Friday and the money should arrive in the sellers' accounts a few days after that.

If a seller opted for cheque payment this will be authorised the same way by two branch volunteers, then a cheque will be printed and sent directly to the seller by the NCT Finance team. As this is much more costly for the charity, please encourage your sellers to register for BACS whenever possible.

Proceeds from the Chip & Pin machines are usually transferred into your account on the Wednesday after the Sale. It then takes us one working day to reconcile this to your account. By Thursday you should have enough funds in your account to pay your sharers. Make sure the sharers' payments are authorised by two branch volunteers before the BACS run on Friday morning.

FAQ

- **How do I change our Seller Number Policy?**

When sellers register for your Nearly New Sale they will be allocated a seller number automatically. Numbers are numerical only, no combination of letters and numbers are currently supported by the system. There are three types of NNS seller number policies and you can see which one currently applies to your sale when you look at Seller Registration under your specific event.

The three types are called Compact, Compact - Two Phase and Full Retention.

Compact means seller numbers are allocated from 1 onwards for each new sale on a first come, first serve basis.

Compact - Two Phase lets sellers from a previous sale register and keep their previous seller number up to a chosen date whilst new sellers are not permitted to register (Phase One). After this date the all registrations will be allocated a number starting with the lowest available as for Compact (Phase Two).

Full Retention means sellers will automatically be allocated the same seller number as their last sale if possible - this is guaranteed if they have not missed too many sales, where you decide the number of sales that can be missed under this Retention Guarantee.

The default NNS seller policy is Compact. If you would like to change this, you need to contact the Intrabiz team as only they can set this for you. If none of the three options above quite fit the requirements of your sale, please also discuss this with us and we will try to find the best solution for you.

- **Why has a previous seller not been allocated the same number?**

Sometimes a previous seller is not allocated their previous number when they register for your NNS although your sale is on the Full Retention seller policy. This happens when the seller registers with slightly different details from before and a new contact is created for them. This difference could be a new email address, but also something small as an abbreviated name vs the long version. If you are contacted by a seller who has been allocated the wrong number, go to the NNS SELLERS tab on Intrabiz and type in their name. If you see two entries for the same seller, find out what the correct data should be and contact Intrabiz support who can merge the entries for you.

The best way to avoid issues like this is to use the “Advertise to previous sellers” function after you have opened your registration. That way, previous sellers will be sent a personalised registration link where they won’t have to enter their personal details again. This avoids duplications.

- **My seller has not given bank details for BACS payment. Can I still pay by cheque?**

Sellers should be encouraged to sign up for BACS payment, but cheques can still be issued. Just choose “cheque” as payment method. This payment needs to be authorised by two branch volunteers as usual. Then, a cheque will be printed centrally at NCT head office and sent directly to the seller.

- **What if my seller has changed their bank details and the BACS payment could not be made?**

Failed BACS payments are picked up by us at Intrabiz and we will then contact the seller directly and ask them to provide the correct bank details. Once received, we will re-submit the payment from our end. You or your treasurer don’t need to get involved.

- **Where do I change my seller’s personal details?**

If any of a seller’s details have changed, they need to change these themselves. You cannot do it from your end. The sellers have a link in their confirmation email which they need to follow to get to their current entry. Here, they can modify any of the information. If need be, you can re-send the confirmation email to them from their seller registration of a previous sale.

- **How can I attach forms to the seller confirmation email?**

Unfortunately in today's world attachments have come to be used in the propagation of viruses. This is why it is no longer the safe way to convey information. The way to do it now is to upload the file somewhere (usually your branch website) and then include the link in the registration confirmation email.

Feedback

We hope you found this manual useful. We welcome all suggestions for additions and improvements to it. Please email nicola@intrabiz.co.uk at Intrabiz.

Copyright 2001-2014 Intrabiz. All Rights Reserved.