UShop⁺
■ Store BI

UShop⁺ Store BI / User Manual

V2.3

ADVANTECH
Enabling an Intelligent Planet

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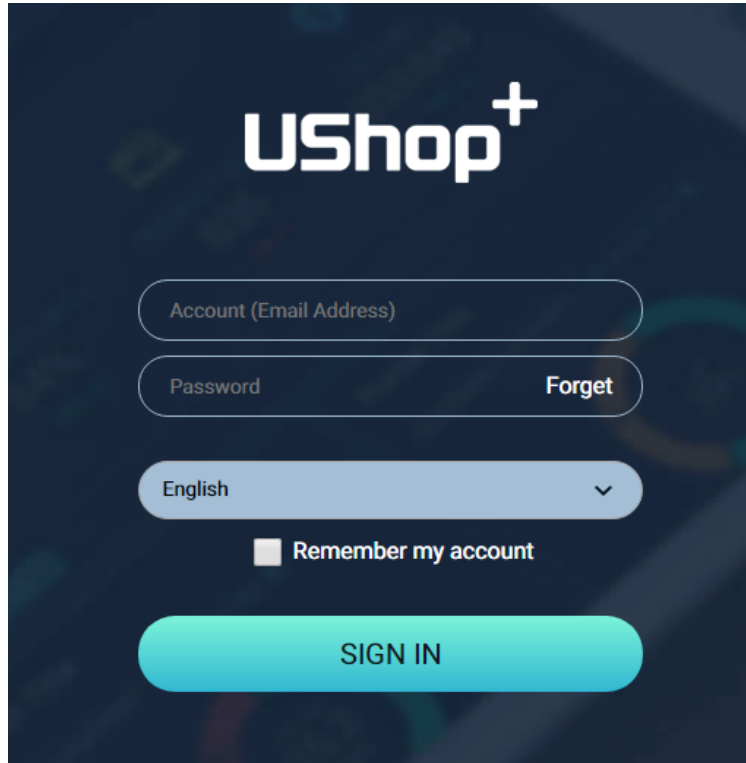
Version History

Version No.	Last update	Chapter	Content
V2.0	07/17/2017	all	
V2.2	10/28/2017		
V2.3	01/08/2018	3. Store BI,	Add Dashboard drop and drag function
		3.1 Brief Introduction to Functions	Add Store KPI details, weather function, store traffic matrix & shopper demographics
		3.2 Overview	
		3.3 Traffic	Modify Additional Data Settings
		3.5 Dashboard	Add dashboard function
		4. Management	Add store management function

Table of Contents

1. SIGN IN

Please enter the URL http://portals.ushop-plus.com into your Internet browser, and go to the sign in webpage of the UShop⁺ platform.
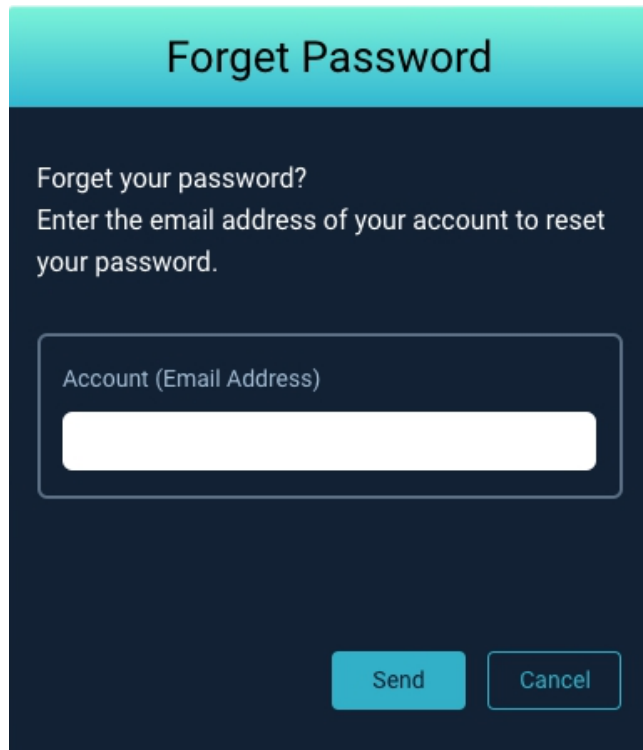

1.1 Sign in Functions

▪ **Setting Process**

- Enter your email address in the "Account (Email Address)" field.

- Enter your password in the "Password" field.

- Choose the language at the drop-down menu

- Tick the box, "Remember my account", to save current user's "Account" and "Password" for the purpose of signing in UShop⁺ platform automatically next time.

- Click the "SIGN IN" button to enter the administration site of UShop⁺ platform.

1.2 Forget Password

- If you forget your password, please click the "Forget" button to the right of the "Password" field.

- After clicking the "Forget" button, a "Forget Password" dialog box will be brought out to prompt the user with the message "Please enter your email address to reset the password".

- Please enter your email address in "Account (Email Address)" field, and click "Send" to transmit the application.
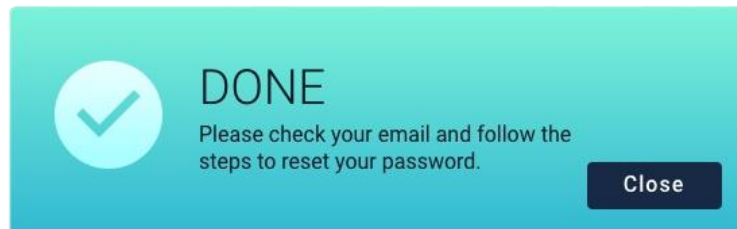
- When the UShop⁺ platform receives your application, a response message" Done, please check your email and follow the steps to reset your password", will pop up instantly. Please click the "Close" button to close the dialog box.


- Please check your email for the letter of verification, and follow the instructions in the email to set a new password. Click the "Reset Password" button to go to reset password webpage.

- On the "Reset Password" webpage, please enter your new password in both "New Password" and "Confirm New Password" fields, then click the "RESET PASSWARD" button to reset your password.

Caution:

Your password must have at least 6-12 characters and a mix of English letters and numbers.
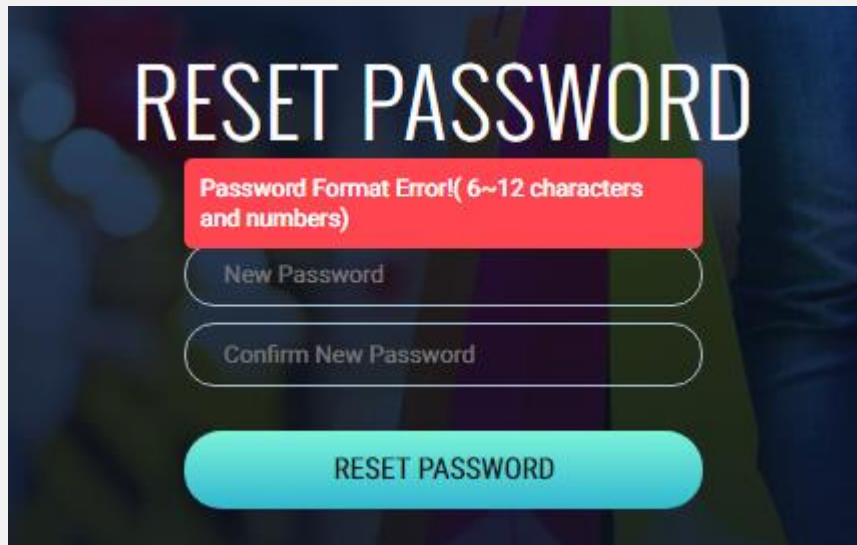
2. INTERFACE FUNCTIONS

2.1 Display and Lock Functional Modules

The functional modules will be released or locked in accordance with the authorizations.

2.2 Switch among Functional Modules

After entering the webpage of functional modules, users can go back to the "User Management" webpage always by clicking the UShop⁺ "UShop⁺" icon at the upper left-hand corner. Users are then allowed to switch to preferable module via clicking the icon of certain functional module.
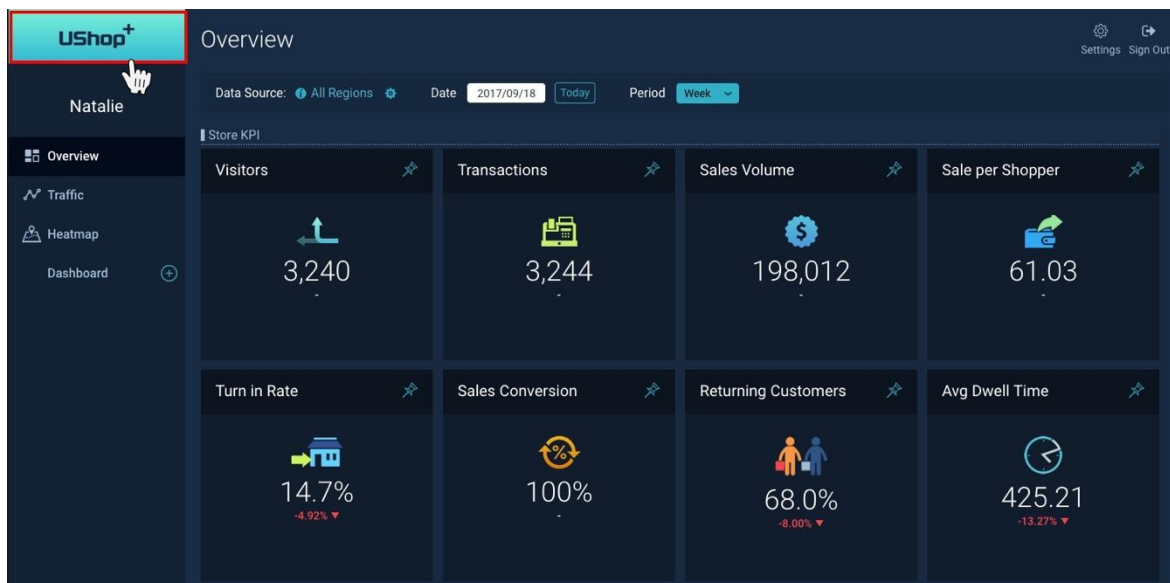
3. Store BI

3.1 Brief Introduction to Functions

- **Store BI:** Statistic, analytic data and intuitive widgets are shown on this webpage, three functional modules are included.
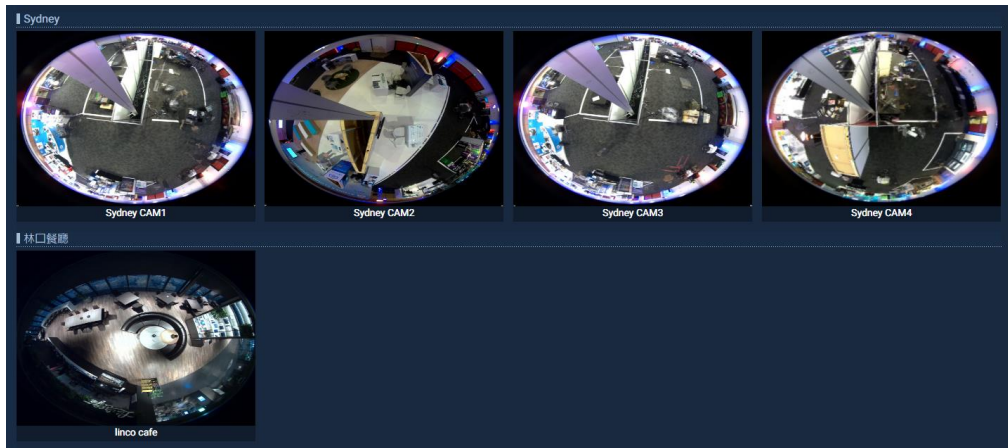
    1. **Overview**: The overview function is designed for displaying default widgets.


    2. **Traffic**: The traffic analysis function allows the user to set criteria for displaying visitor related information, and to analyze the data.
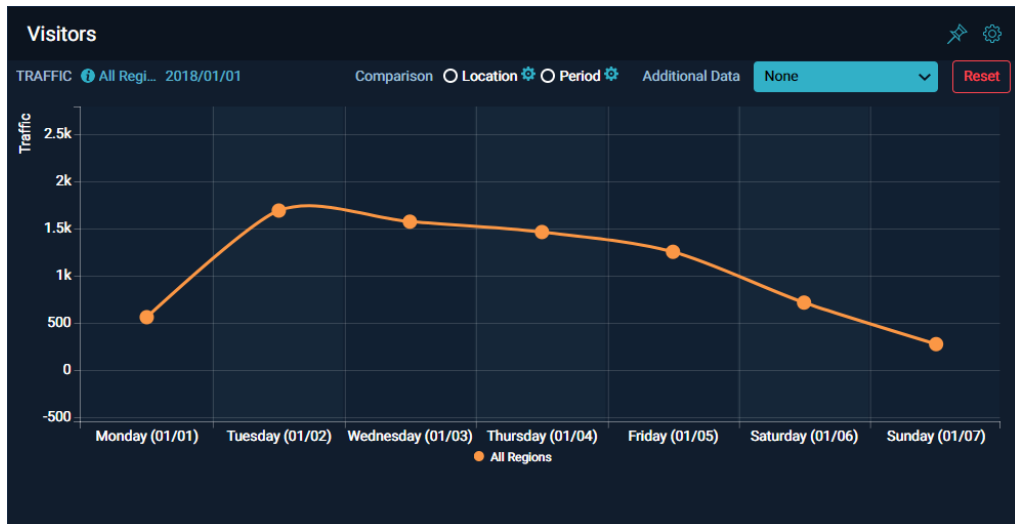
3. <u>Heatmap</u>: The heatmap function allows the user to select certain areas with field view of camera to analyze the heatmap distribution.

4. <u>Dashboard</u>: The dashboard function allows the user to set user-defined dashboard name, and add customized items (max. 15 dashboards) by clicking the ⊕ "plus" icon to the right of the dashboard. Moreover, the user can adjust the priority by drop and drag the dashboard to the specific order.
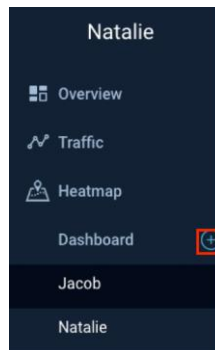
▪ **Settings:** Click the "Settings" button at the upper right-hand corner of the module page to change the language. Users can choose the appropriate language at the language drop-down menu.
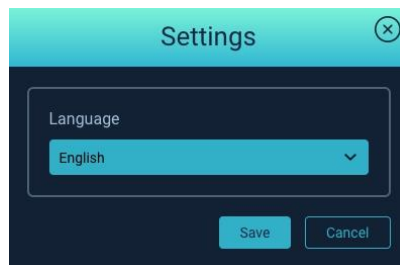

▪ **Sign Out:** Click the "Sign out" button to log-out the administration page of UShop+ platform.

3.2 Overview

- **Overview**：The default layout of the overview page includes two sets of information, "Store KPI" and "Store Traffic & Shopper Demographics".

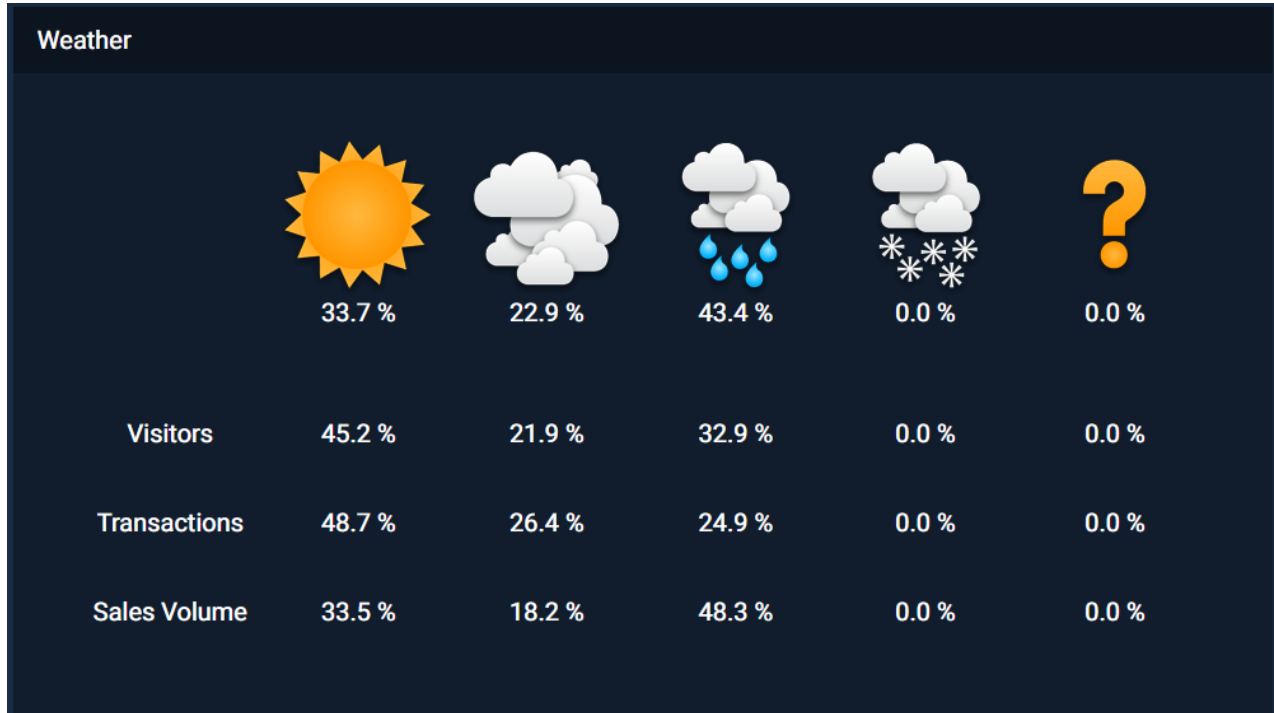 1. **Store KPI**：Shows three sets of information including "store KPI", "Store Ranking" and "Weather information".

     First is "Store KPI" part, key indicators include "Visitors", "Transactions", "Sales Volume", "Sale per Shopper", "Turn in Rate", "Sales Conversion", "Returning Customer", and "Avg Dwell Time". Upper four KPIs show the actual number of the data and lower four KPIs displays the percentage.
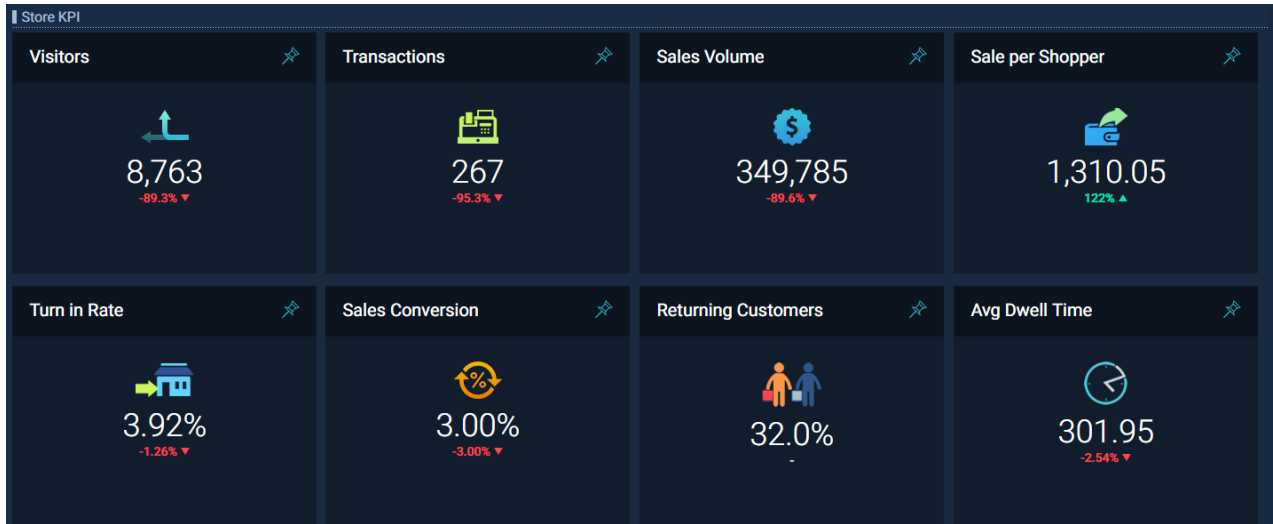
     Second, "Store Ranking" shows the top 5 stores and allow sorting out with store data including visitors, transactions, sales volume and turn in rate.

Store Ranking

	Top 5 Store	Visitors	Transactions	Sales Volume	Turn in Rate
1	Store A	6565	0	0	0.0
2	Store F	1198	267	349785	0.0
3	Store E	1000	0	0	10.1
4	Store D	0	0	0	0.0
5	Store C	0	0	0	2.5

Third, "weather" information combines each store location's weather information along with each store data and presents the result in percentage.

2. **Store Traffic & Shopper Demographics**：Shows two sets of information including "shopper demographics" and "store traffic matrix".

First, "shopper demographics" indicate "Age" and "Gender" distributions of the visitors.
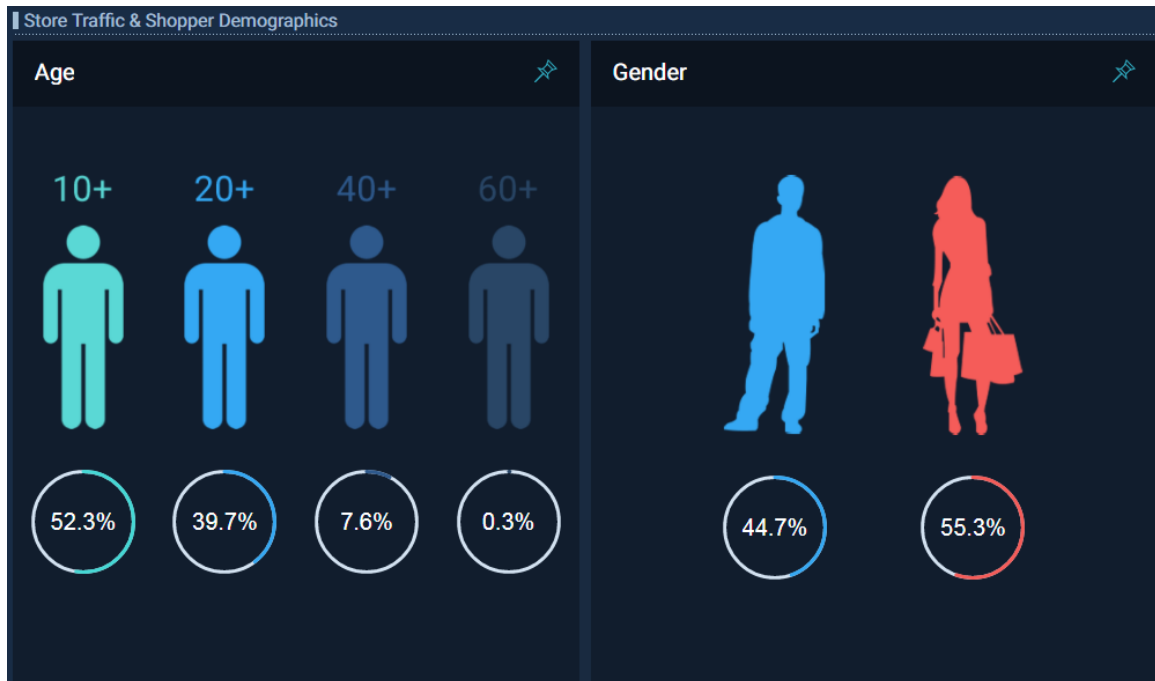
Second, "store traffic matrix" displays the store traffic details of the period user selected. At the bottom of the matrix is the color index, lighter the color represents the higher the store traffic number and darker the color represent the lower the store traffic number.

Matrix														📌 📊
Date	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:0
2018/01/01	5	51	10	5	13	137	54	17	37	38	63	23	32	49
2018/01/02	11	183	44	36	321	448	179	88	52	64	115	44	40	41
2018/01/03	22	148	33	46	307	485	70	81	54	72	95	57	43	35
2018/01/04	20	161	48	25	289	416	67	62	47	46	131	33	40	48
2018/01/05	18	138	24	33	210	415	82	43	25	39	82	32	38	54
2018/01/06	7	65	12	7	34	221	48	54	32	37	38	34	49	52
2018/01/07	0	1	0	0	0	30	19	21	27	32	27	29	30	29

lowest ▢▢▢▢▢ highest

Caution:

- ▪ System does not save any changes that has been done on any certain widget on the "Overview" webpage, which means all the settings that have been done will be removed when the user signs out, and the "Overview" page remains showing the default settings when the user comes back.

3-2-1. Retail Performance Data

When the user needs to check the data in detail, simply adjusts the settings to the user's own criteria at the "Data source", "Date" and "Period" at the top of the "Overview" webpage, the widget will be updated accordingly.

1. Data Source: The default setting of "Data Source" is all retail stores at "All Regions".

Overview

Data Source: ⓘ All Regions ⚙   Date [2017/09/18] [Today]   Period [Week ▾]

- ▪ **Setting Process：**

  - ▪ Mouse over the icon ⓘ "Information" to the left of "Data Source", all the chosen stores will be shown.
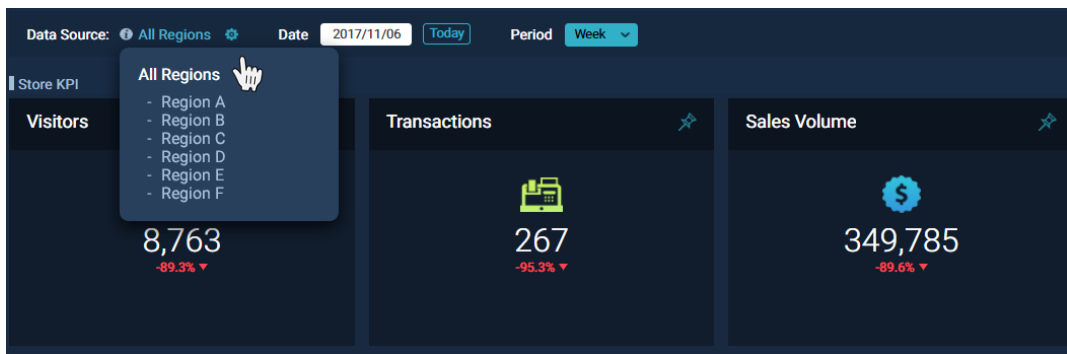
- Click the ⚙ "Setting" icon to the right of "Data Source", a "Data Source Settings" dialogue box will soon appear.


Data Source Settings:

1. "Title": A group name for a certain set of store data can be typed in this field

2. "All stores and groups": A name of a certain store can be entered in the text box and search for it, or search and tick the designated store at the "Please Select" list.

3. Click the arrow icon 　　 to add selected store to the "Selected stores and groups" list.

4. Click the cross icon 　　 to eliminate a certain store from the "Selected stores and groups" list.

5. Click Reset 　　 "Reset" to regain the removed item.

6. Click "Done" to finish settings and go back to the "Overview" page.

7. Click "Cancel" to quit all the settings and go back to the "Overview" page.
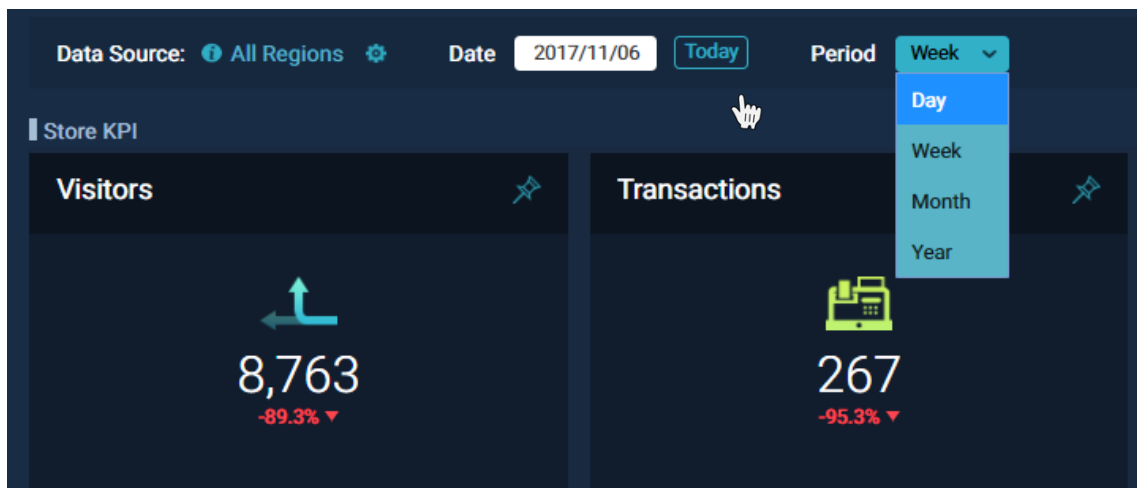
2. Date: System's default date is present.
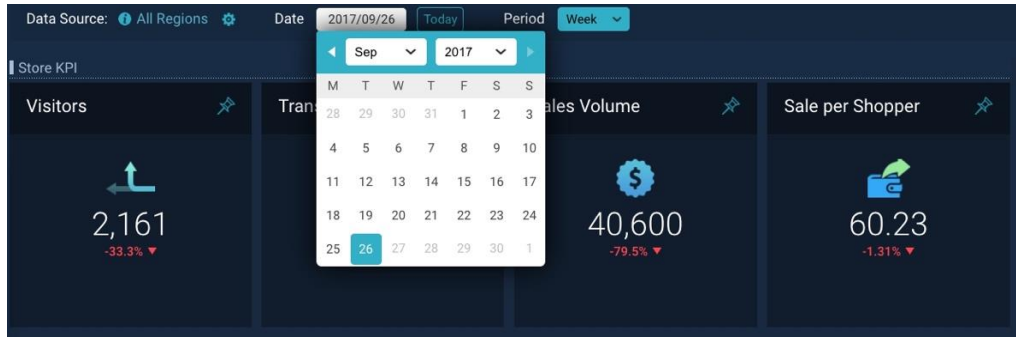
- **Setting Process:**
  - Click the text box of "Dat 2017/09/26 ,and select current "Year", "Month" and "Date".
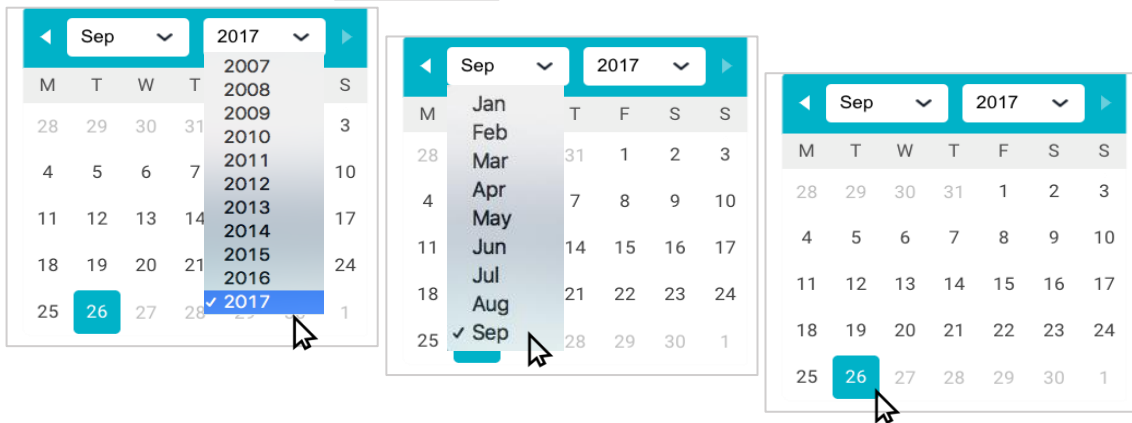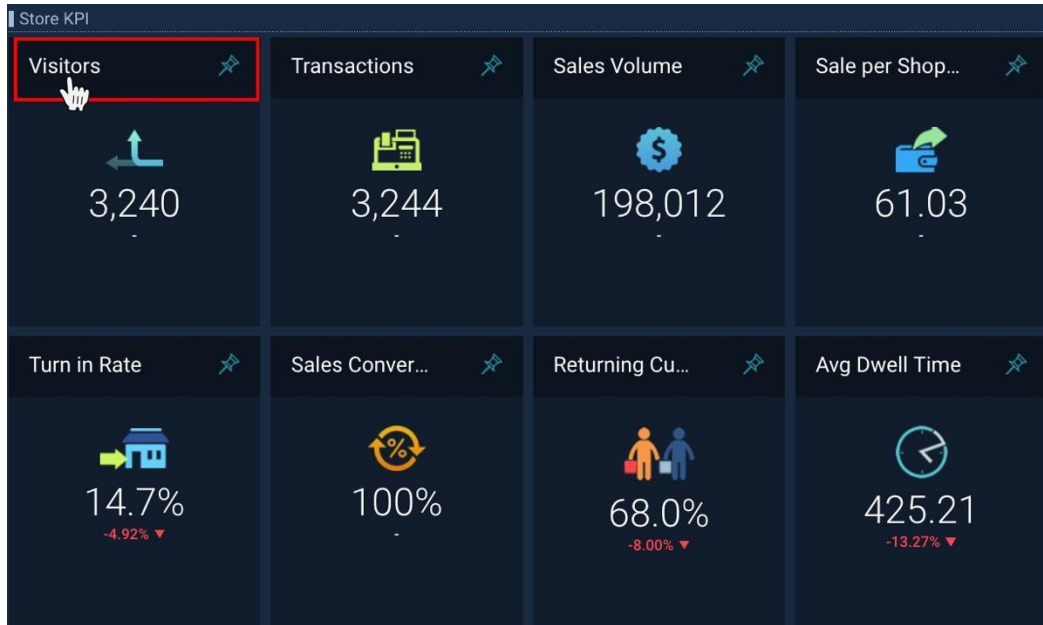

  - Click on the "Today" button, the "Date" will be adjusted to system date as well.

3. Period: Allows the user to set the data of current "Day", "Week", "Month" or "Year" shown on the "Overview" page.

3-2-2. Widgets in Detail

Move the cursor to the title of each performance indictor, click to enter the detailed data page when 🖑 finger shape cursor pointer shows.

- **Setting Process: (i.e. Visitors)**
  - Click the "Visitors" to enter the webpage of detailed statistic data of visitors. Please move the mouse cursor on the node of line graph to read the detailed data of a specific period.
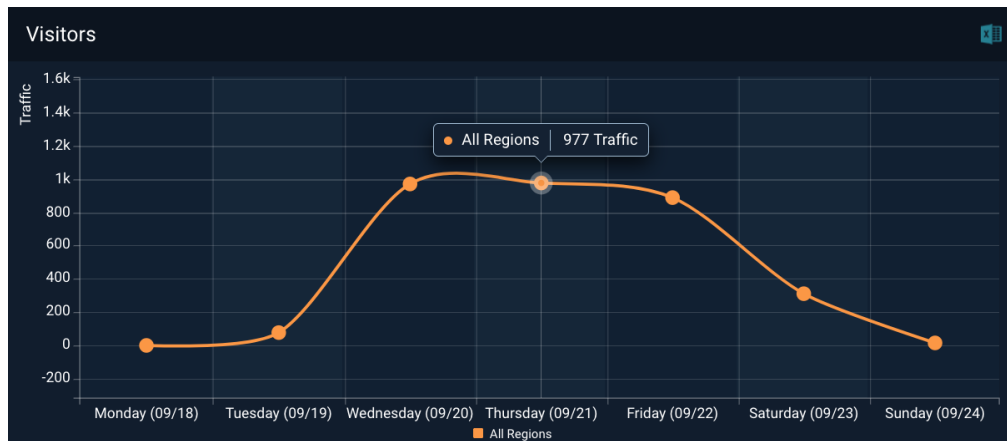

  - To export detailed data, please click the "Excel" icon at the upper right-hand corner of the graph.
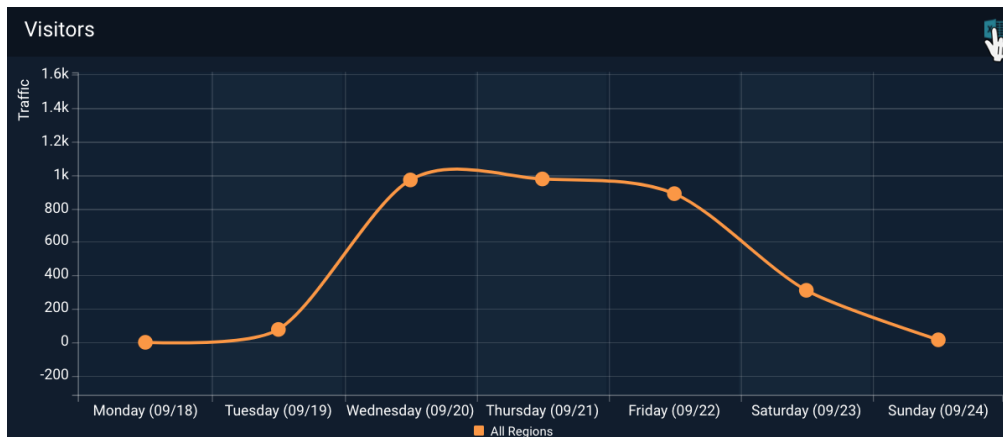
- Report: Displayed under the line graph which contains detailed numeric data.

Report	
Date	Traffic
Monday (09/18)	0
Tuesday (09/19)	77
Wednesday (09/20)	971
Thursday (09/21)	977
Friday (09/22)	889
Saturday (09/23)	311
Sunday (09/24)	15

- Keep the widget settings: All the adjustments and settings that have been done on the widget of "Overview" webpage cannot be saved. The settings will be saved only when the adjusted widget has been "Pinned" to "Self-defined Dashboard".

- Click the "Pin" button to the right of the "Visitor", a dialog box will appear. Tick the "Dashboard" that correspondent with the adjusted widget, and click "Done" to pin the widget on the dashboard.

Store KPI

| Visitors	Transactions	Sales Volume	Sale per Shopper
3,240	3,244	198,012	61.03
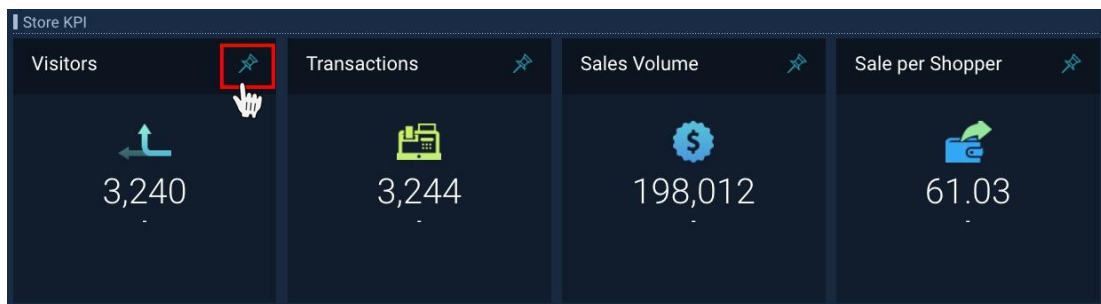
3.3 Traffic

System does not save any changes that has been done on any widgets on the "Traffic" page, which means all the settings will be removed when the user signs out, and the "Traffic" page remains showing the default settings when the user comes back.

- **Setting Process：**
  - Click the "Traffic" button to enter the webpage of detailed statistic data of visitors for the stores of all regions. Please move the mouse cursor on the node of line graph to read detailed data of a specific period.
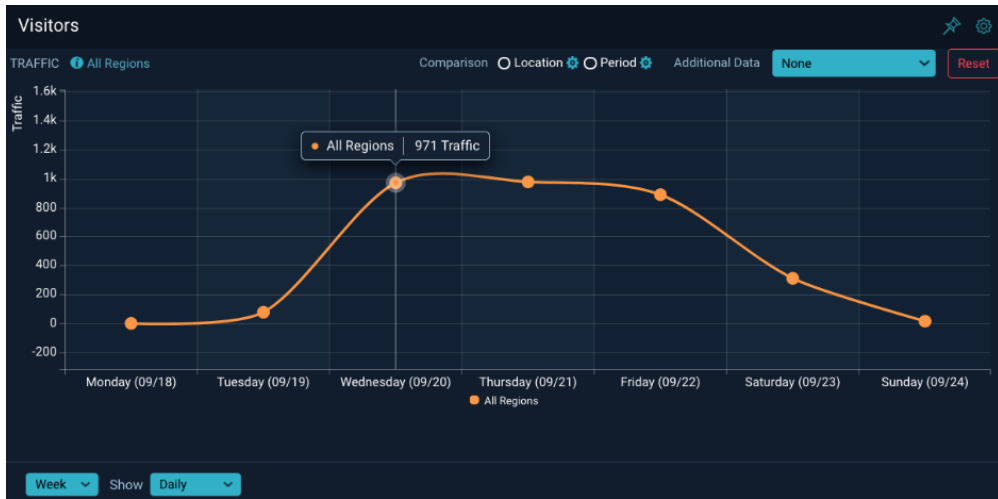
- Click on the "Pin" button at the upper right hand on the widget, a dialog box of will be brought out. Tick the "Dashboard" correspondent with the adjusted widget, and click "Done" to pin the widget on the dashboard.
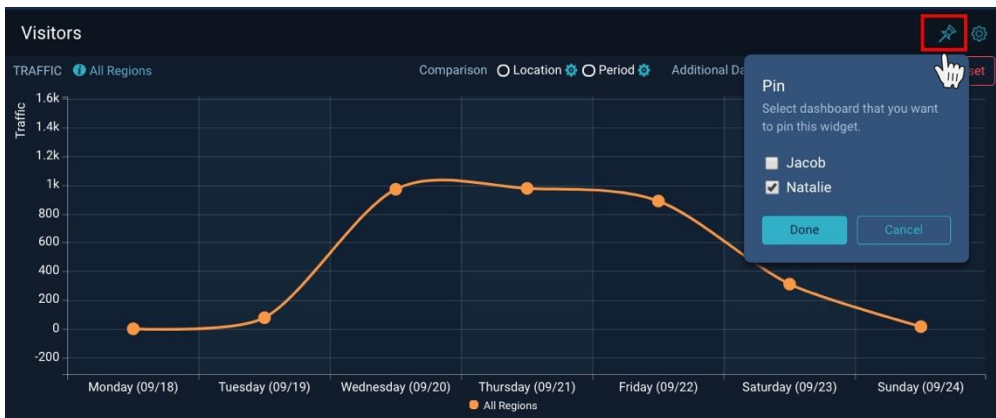
- Click the "Setting" button at the upper right-hand corner of the widget, an "Edit Widget" dialog box will then appear.
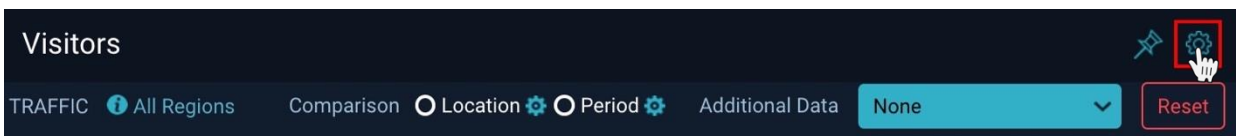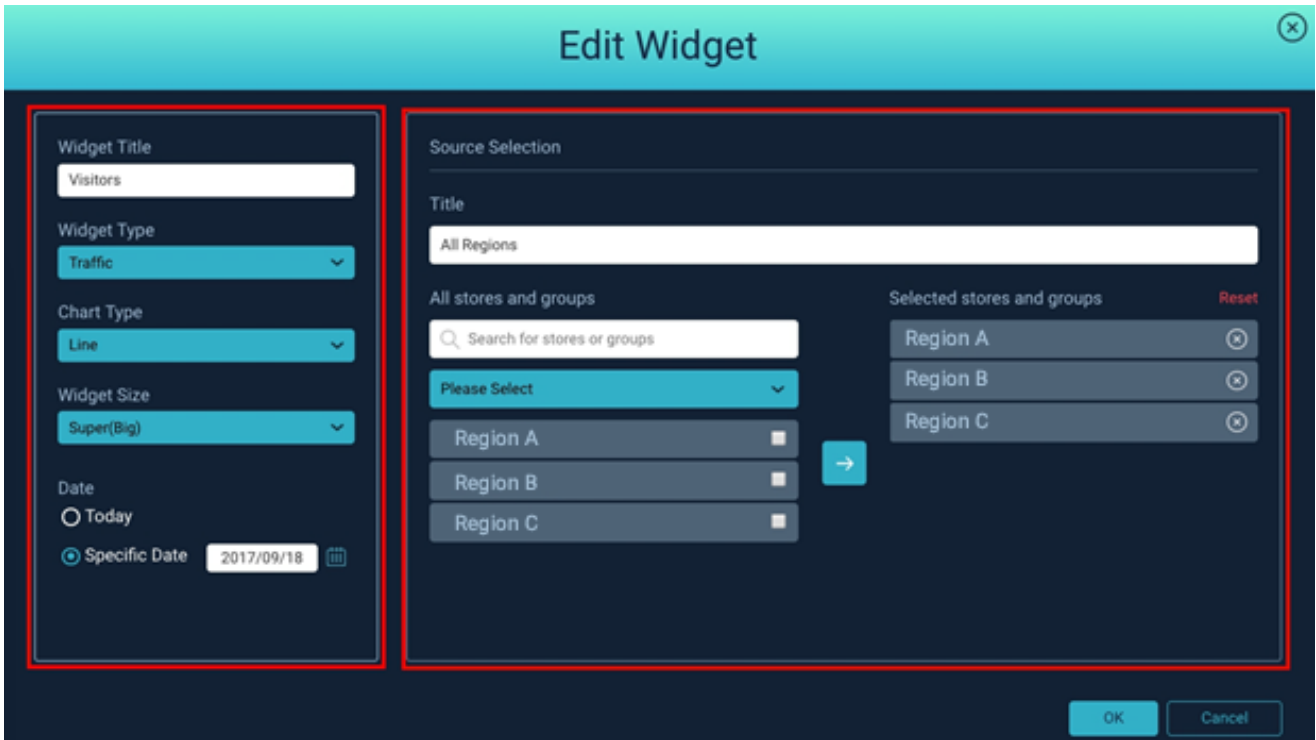

Edit Widget Settings:

1. On the left side: "Widget Title", "Widget Type", "Chart Type", "Widget Size", and "Date" can be adjusted.

2. On the right side: "Title" and "All stores and groups" can be

defined.

3. Click "OK" to finish and apply all the settings on the "Traffic" webpage.

4. Click "Cancel" to quit all the setting and go back to the "Traffic" webpage.


1. Location Comparison Settings:
   - Click the checkbox to the left of "Comparison" at the top of widget to enter location comparison mode, then click the setting icon to bring out a dialog box of "Data Source Settings".
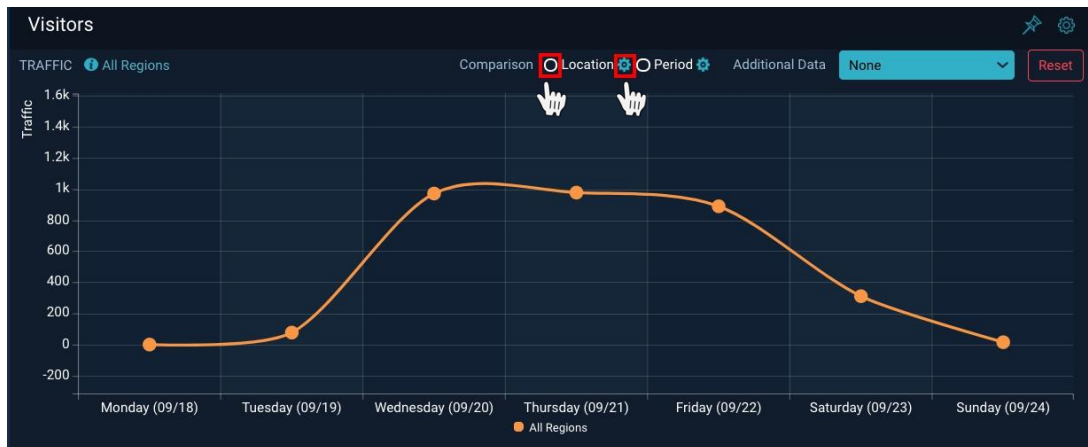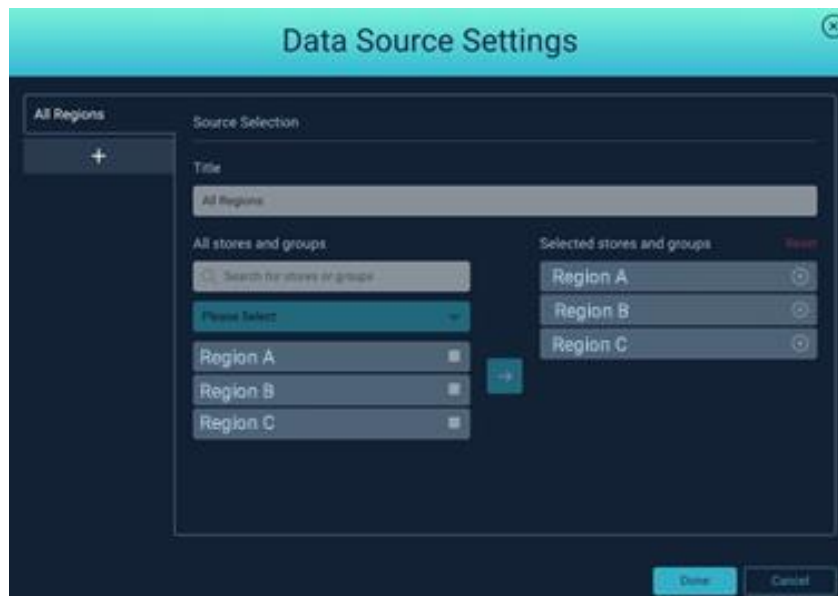
Data Source Settings:

1. "All Regions" that shows in the text box are preset as data from all stores, and cannot be adjusted.

2. Click the ➕ "Plus" icon below "All Region" to add new comparison items (Max. 5 regions).
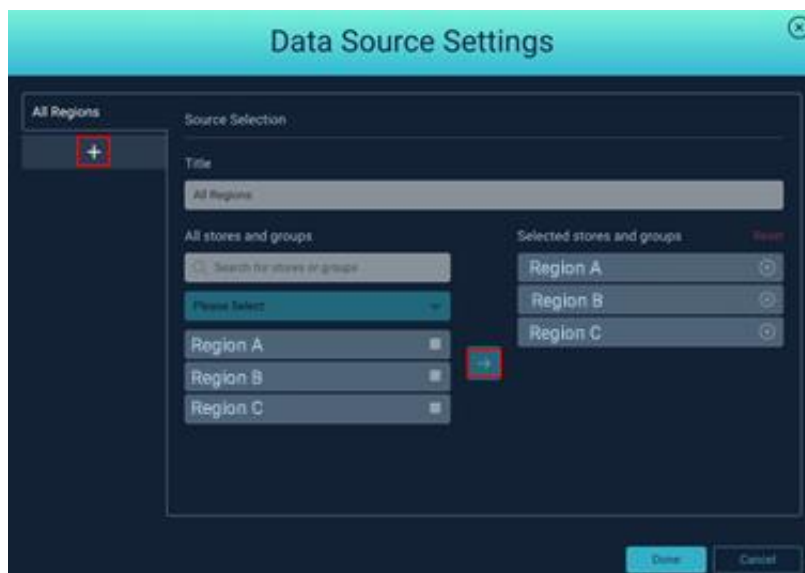
3. Enter a name for the new data source in the "Title" field.

4. Enter the name of the store that wanted to search in the "All stores and groups", or select and tick designated store at "Please Select" list.

5. Click the arrow icon [→] to add selected store to the "Selected stores and groups" list.

6. Click the cross icon ⊗ to eliminate a certain store from the "Selected stores and groups" list.

7. Click [Reset] "Reset" to regain the removed item.

8. Click "Done" to finish settings and go back to the "Traffic" webpage.

9. Click "Cancel" to quit all the settings and go back to the "Traffic" webpage.

▪ View the "Location Comparison" graph after finishing adding comparison items.
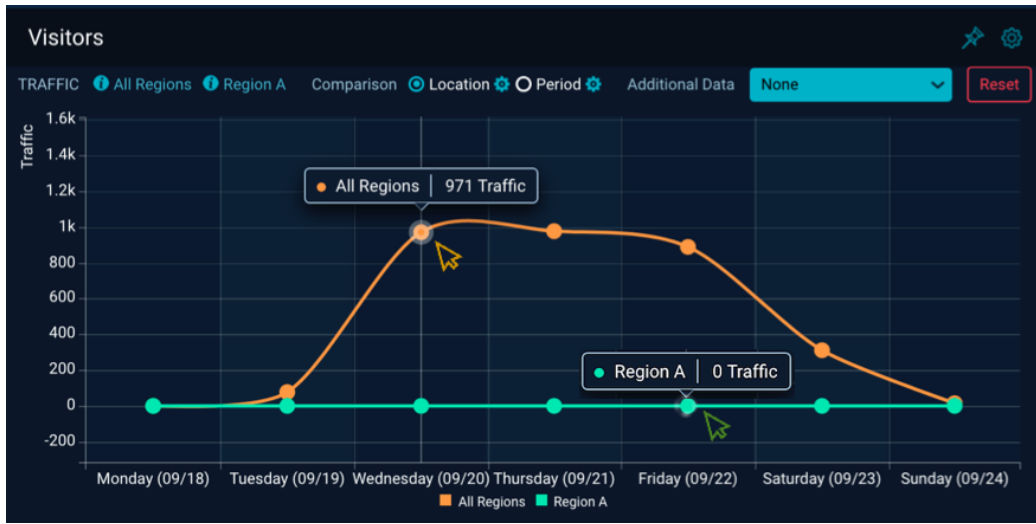
2. Period Comparison Settings:

- Click the ◉ checkbox to the left of "Comparison" at the top of widget to enter period comparison mode, then click the ⚙ setting icon to bring out a dialog box of "Period Settings".


Period Settings:

1. "System Date" that displays in the text box is preset, and cannot be adjusted.

2. Click the ➕ "Plus" icon below "Today" to add new comparison date.
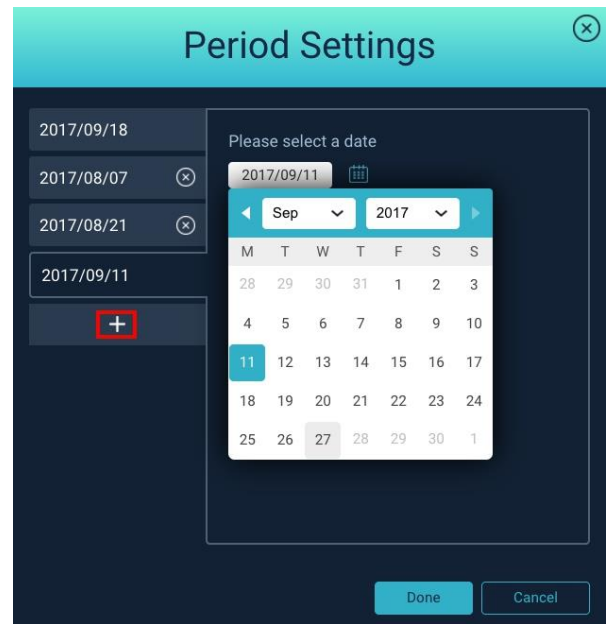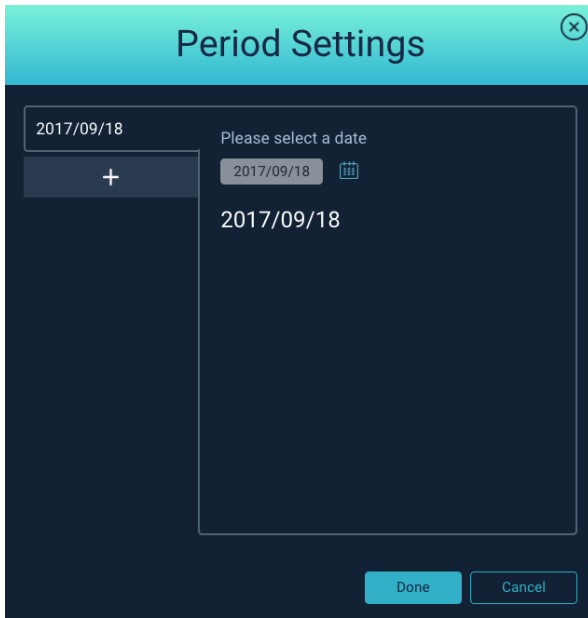
3. Click on the date field below "Please select a date" to choose a certain date that the user wants to view.

4. Click the cross icon ⊗ to eliminate a certain date from the "Please select a date" list.

5. Click "Done" to finish settings and go back to the "Traffic" webpage.

6. Click "Cancel" to quit all the settings and go back to the "Traffic" webpage

- The line graph of "Period Comparison" will be displayed after finishing adding comparison periods.
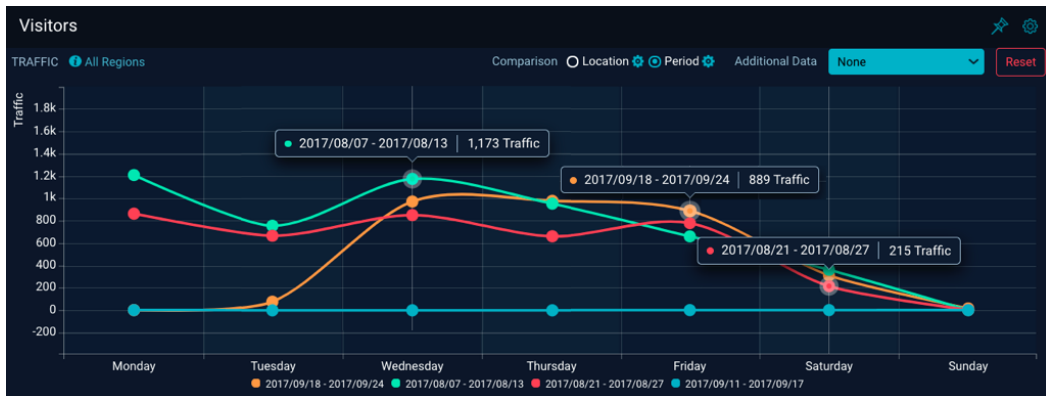
3. Additional Data Settings

▪ Click the drop-down menu next to the "Additional Data" at the top of the widget and select an additional data to compare with.

The items that allow to be compared are:"Wifi Traffic", "Sales Conversion", "Transaction", "Sales Volume", "Sale per Shopper", "Turn in Rate", "Returning Customer", and "Average Dwell Time".

3.4 **Heatmap**

Enter the "Heatmap" webpage, all the stores that participate heatmap analysis and their corresponding surveillance footages will be listed and displayed.
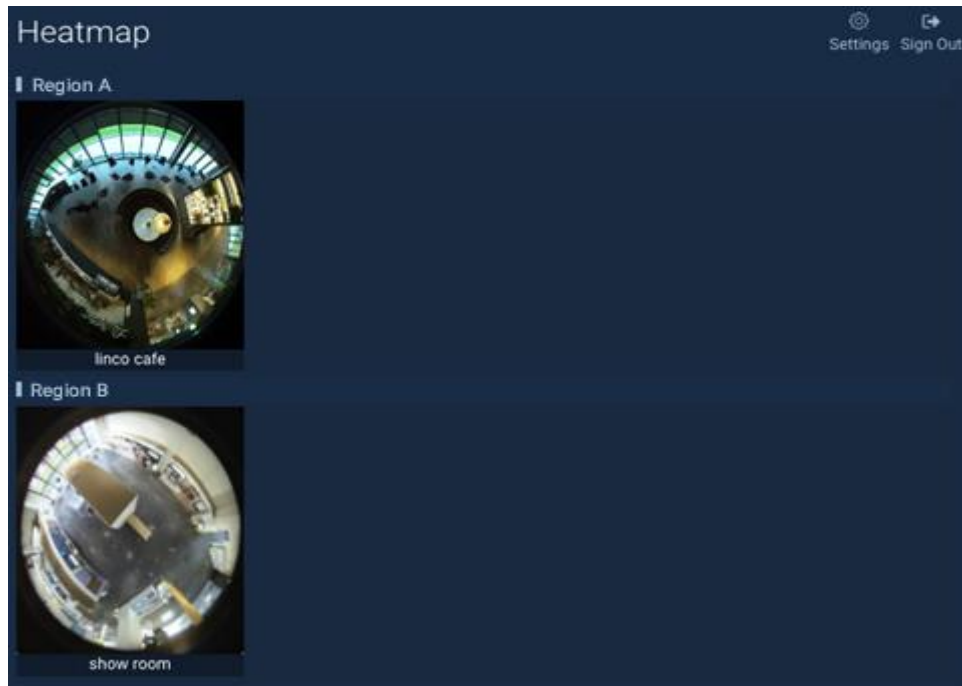
- **Setting Process：**
  - Click any one of surveillance footage on the "Heatmap" webpage to enter its detailed information page. Information about "Date", "Period", "Weekday to show" can be adjusted and the heatmap footage will be shown accordingly.
 - The webpage that shows detailed information of heatmap displays top 5 heat zones.
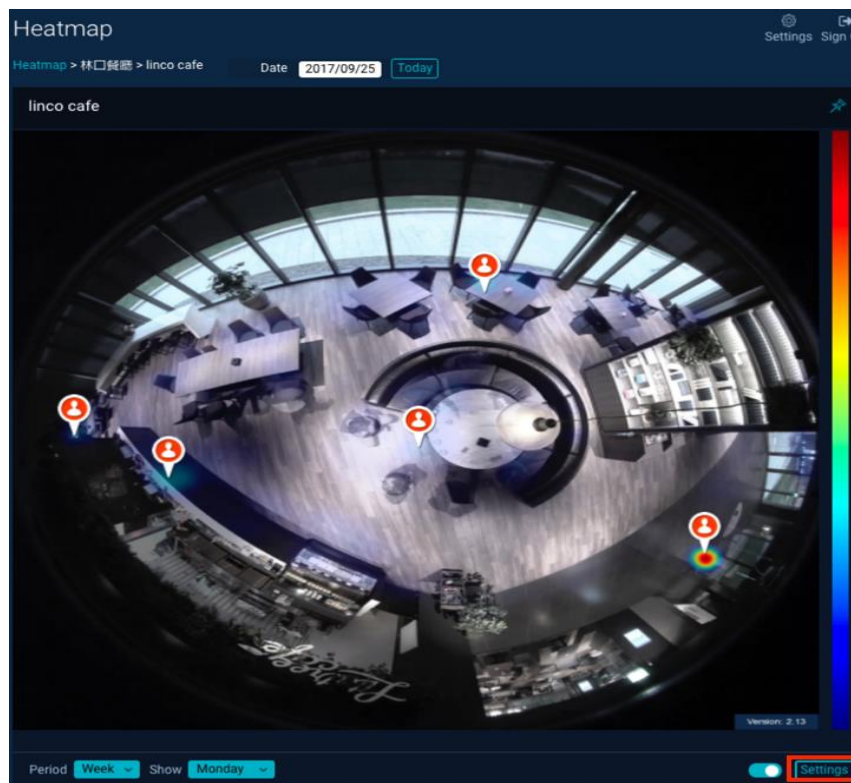
- Click the "Settings" button at the bottom of detailed page, a dialog box of "Edit Favorite Zone" will be brought out to allow users to define their own "Favorite Zone".
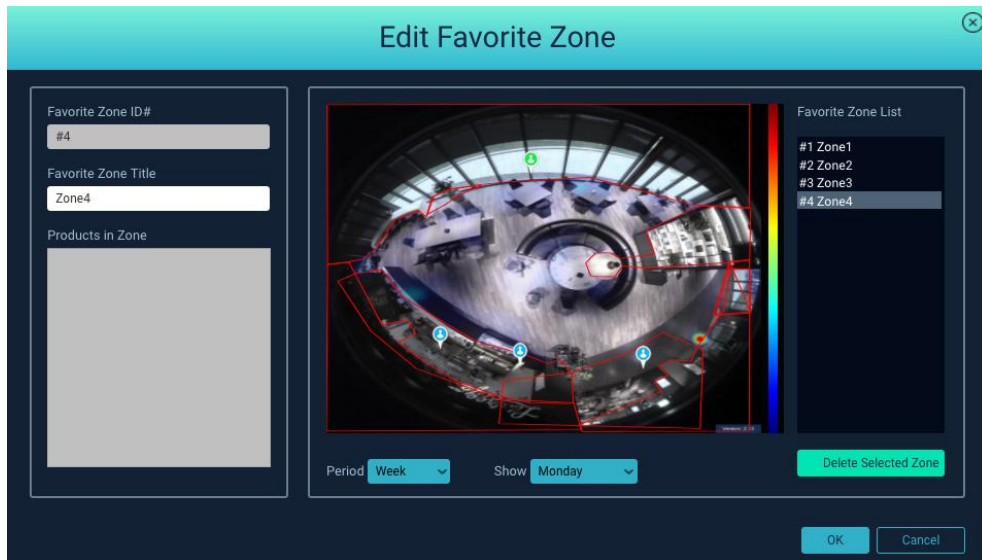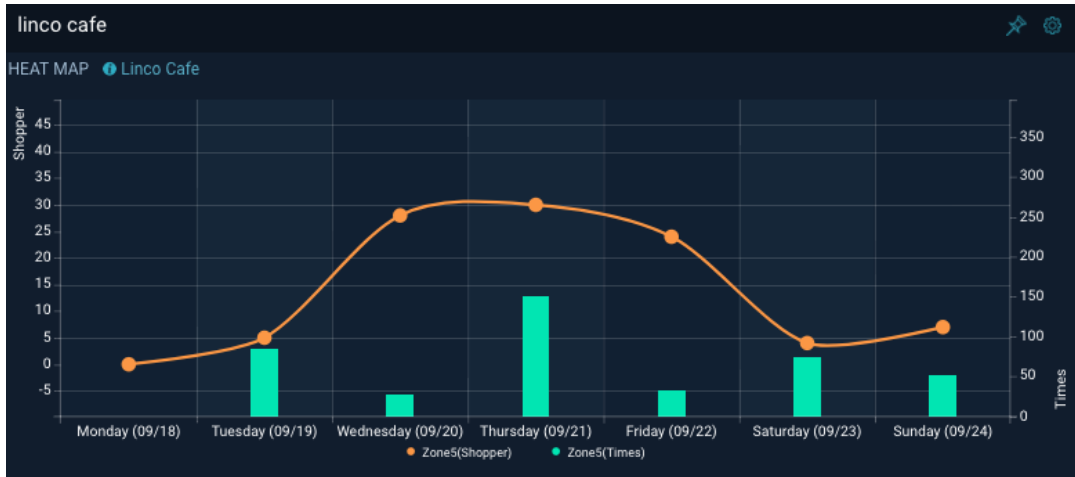

Edit Favorite Zone:

1. Left-click the mouse at the favorite zone in non-undetected area on the heatmap footage which displayed at the center of the window, a "Favorite Zone" will soon be established. The favorite zones that have been set are listed one by one on "Favorite Zone List" as well.

2. Click the "Delete Selected Zone" button to remove selected "Favorite Zone".

3. Give a number to the selected "Favorite Zone", and enter it in "Favorite Zone ID#" field.

4. Give a name for the selected "Favorite Zone", and enter it in "Favorite Zone Title" field.

5. Click the "OK" button to finish and apply all the setting on the "Heatmap" webpage.

6. Click "Cancel" button to quit all the settings, and go back to the "Heatmap" webpage.

- View the detailed "Heatmap" webpage which has included the newly added favorite zones. The blue tags on the footage are those customized ones.
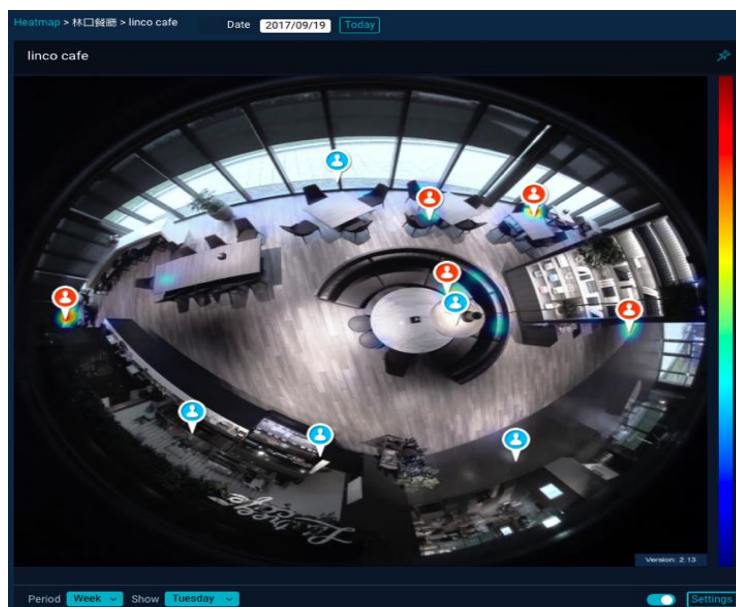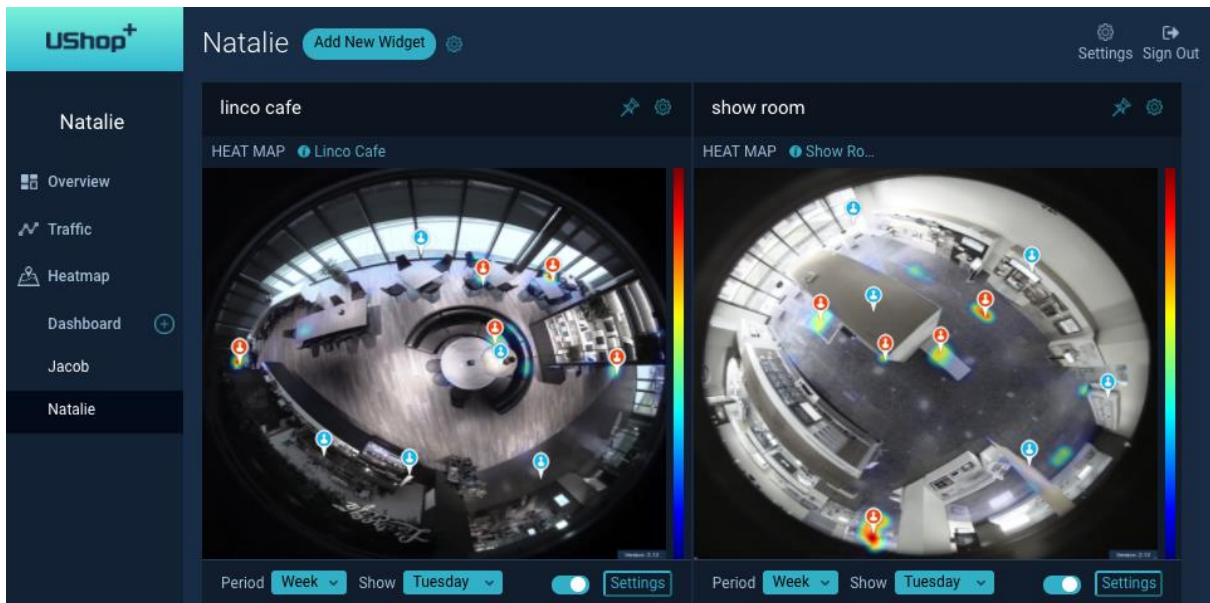
- To enter the detailed page of a certain "Favorite Zone", please click its corresponding blue tag on the footage.

- Location and Period Comparison Settings for the Favorite Zone
  The location and period comparison functions of the "Favorite Zone" must be done at the "Dashboard" webpage, and only feasible for those stores that have been included in this dashboard.
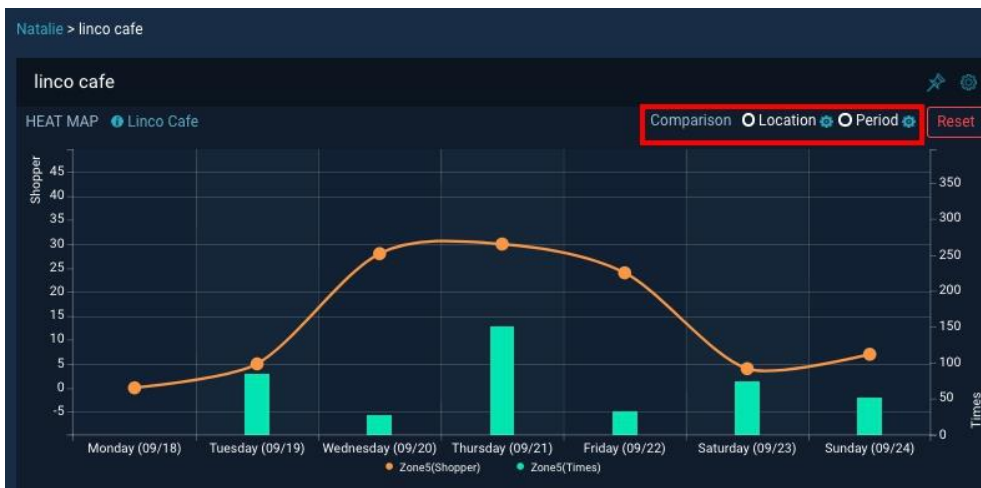
 (1). Add the "Heatmap" of two stores to the "Dashboard", and they are "Heat Zone 1" and "Heat Zone 2" respectively.

(2). Mark favorite zones on two footages.

(3). Click the blue tag on the footage of any store to enter the detailed page. The checkboxes for "Location" and "Period" comparisons are at the upper right-hand corner.

(4). Click the setting icon to the right of "Store Comparison" at the top of the webpage to choose a favorite zone and start comparing.
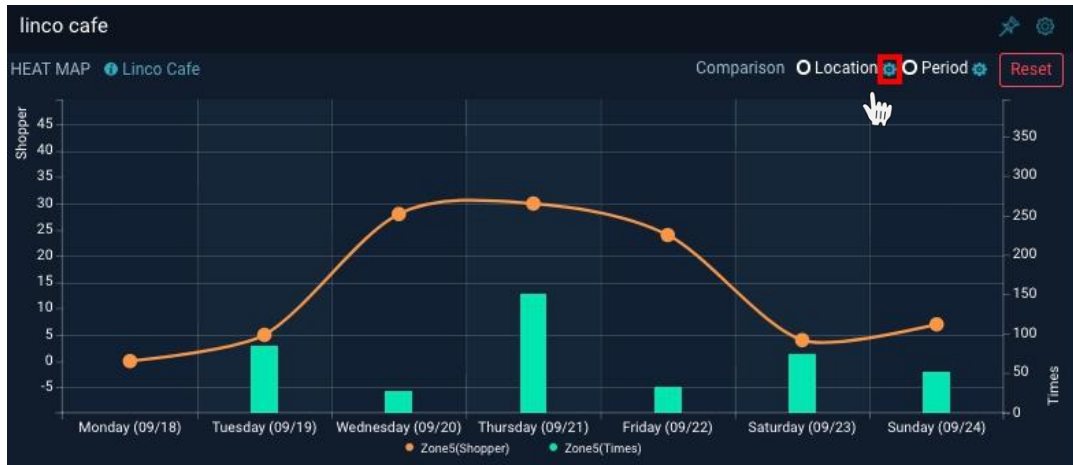
(5). Click "Done" to display comparison widget.

(6). Click the setting icon to the right of "Period Comparison" at the top of the webpage to set different periods and start comparing.

3.5 Dashboard

Only the widget that has been pinned to "Dashboard" can be displayed. Users are allowed to add new widget to the "Dashboard" as well. All the changes for the widgets on the "Dashboard" webpage will be saved.

**1.   Add New Widget**
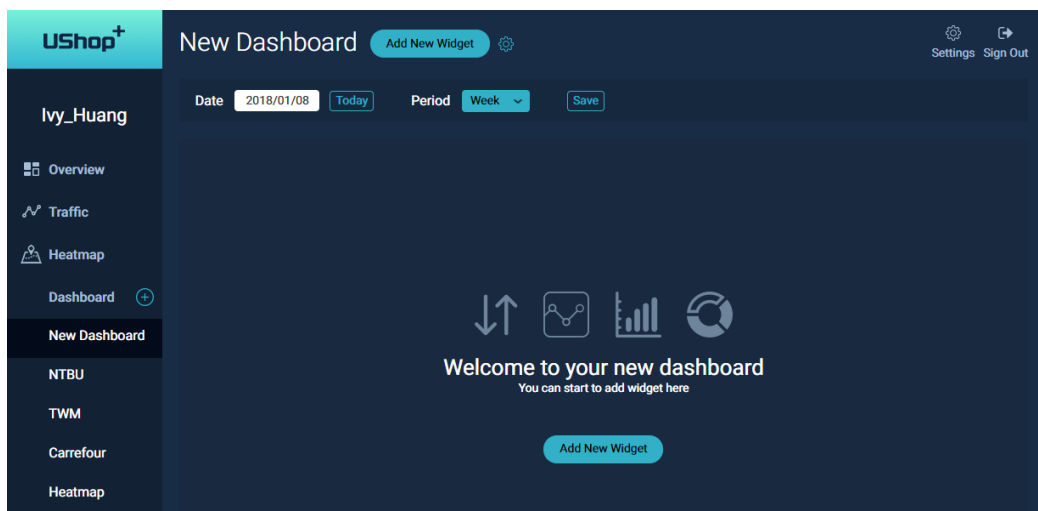
- **Setting Process：**

  - Click the "Add New Widget" icon, an "Add Widget" dialog box will be brought out.

Add Widget Settings:

1. On the left side: Setting fields for "Widget Title", "Widget Type", "Chart Type", "Widget Size" and "Date".

2. On the right side：Setting fields for "Title" and "All stores and groups".

3. Click "Save" to finish settings.
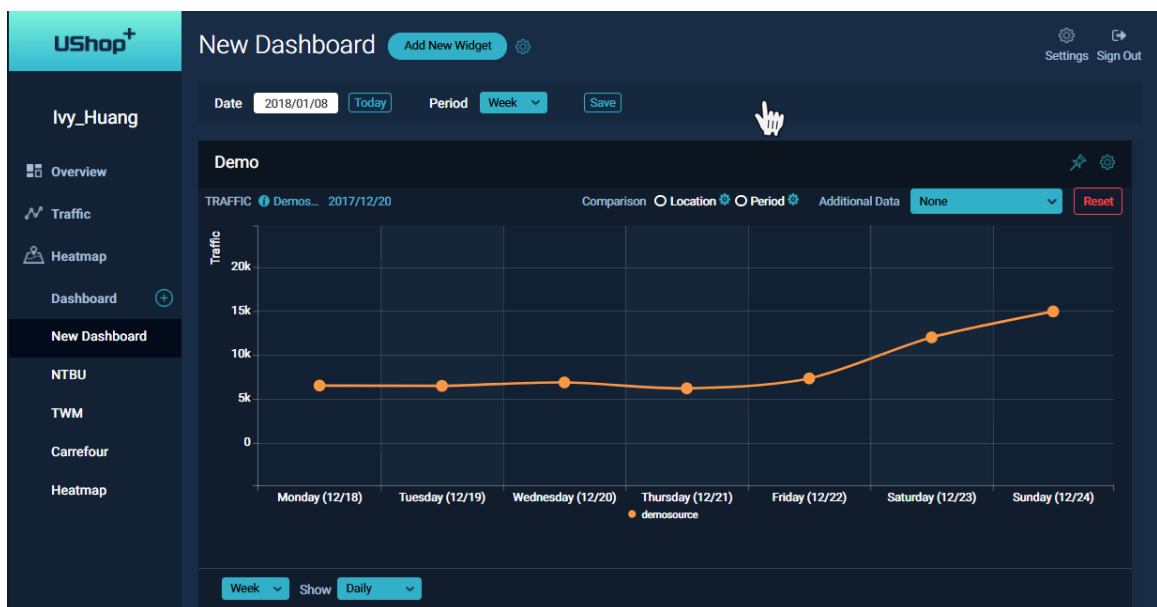
- Delete widget: Click the setting icon at the upper right-hand corner of the widget to bring out "Edit Widget" dialog box, then click "Delete Widget" to finish deleting the widget.
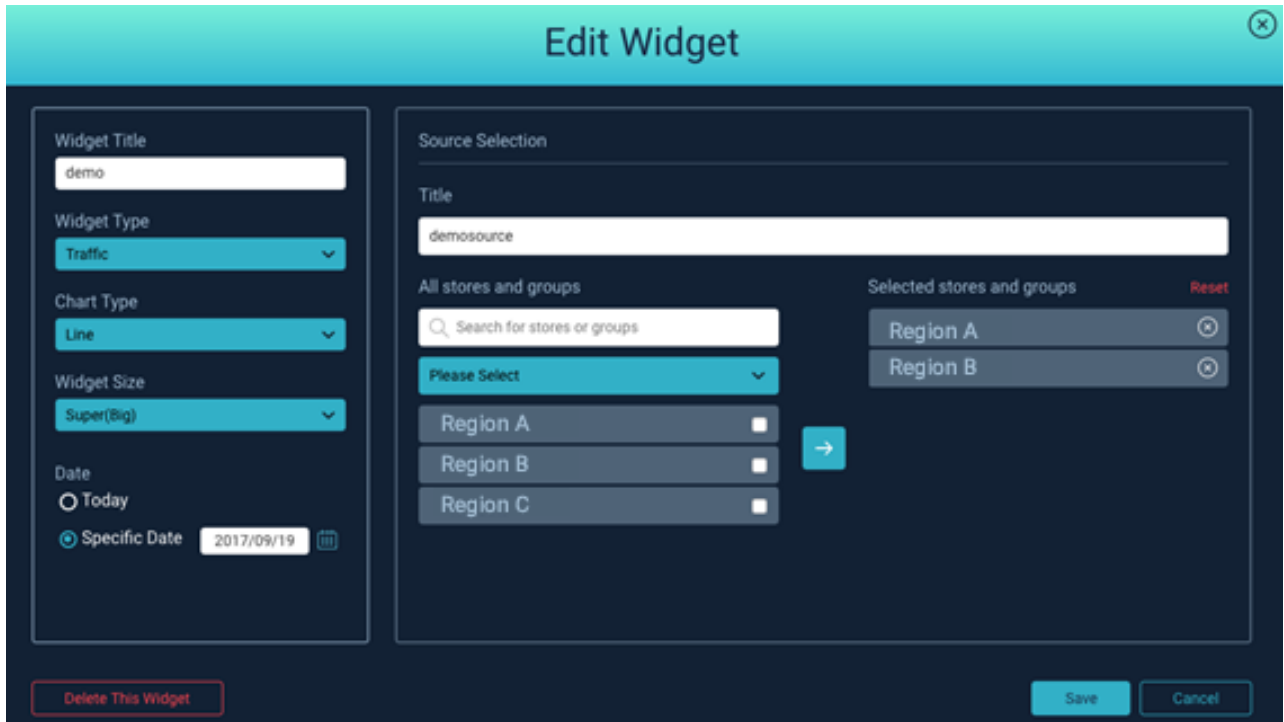
2. Modify and Delete the Dashboard

Go to the "Dashboard" which needs to be modified, and click the ⚙ setting icon at the upper left hand corner of the "Dashboard" webpage to bring out the "Dashboard Settings" dialog box. This dialog box allows users to revise the title of the dashboard, as well as to delete the dashboard.
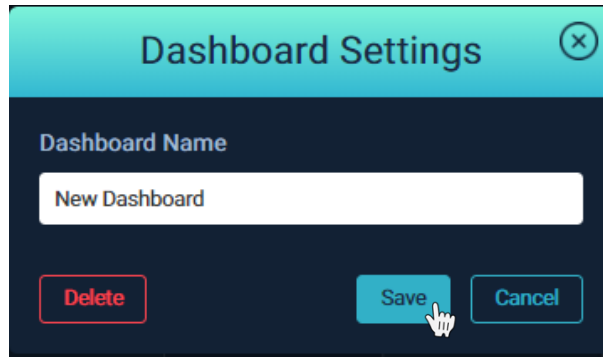
3. Change data date and period

When the user needs to change the data date and period, simply adjusts the settings to the user's own criteria at the "Date" and "Period" at the top of the "Dashboard" webpage, the widgets in the dashboard will be updated accordingly.
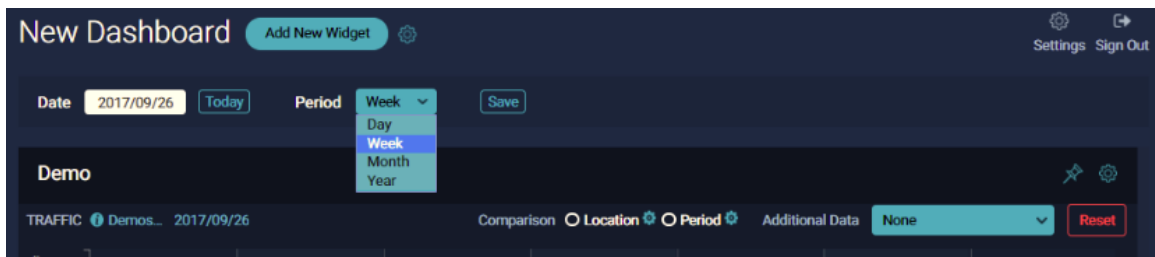
▪ Date: System's default date is present.

Setting Process:

▪ Click the text box of "D 2017/09/26 ,and select current "Year", "Month" and "Date".
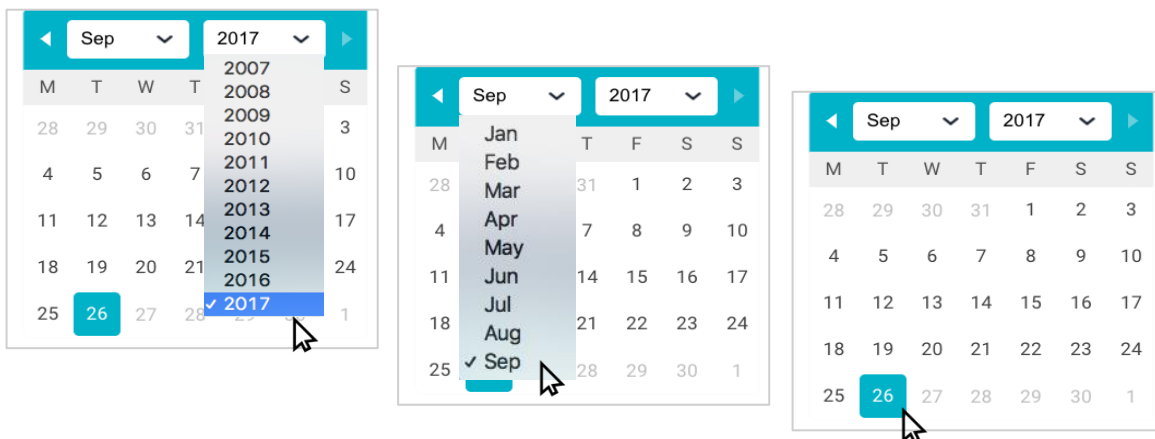
▪ Click on the "Today" button, the "Date" will be adjusted to system date as well.

▪ Period: Allows the user to set the data of current "Day", "Week", "Month" or "Year" shown on the "Dashboard" page.

- Save: Apply the setting to the widgets of the dashboard.

4. Management Center

The functions introduced to the "Management Center" webpage is described from the aspect of system administrator. The users would be divided into two authorization categories, "Manager" and "General User", and the accessibility of functions would be restricted accordingly.

4.1 Sign in Information Management

"User Management" webpage is displayed as default setting when the user enter the "Management Center" functional module.
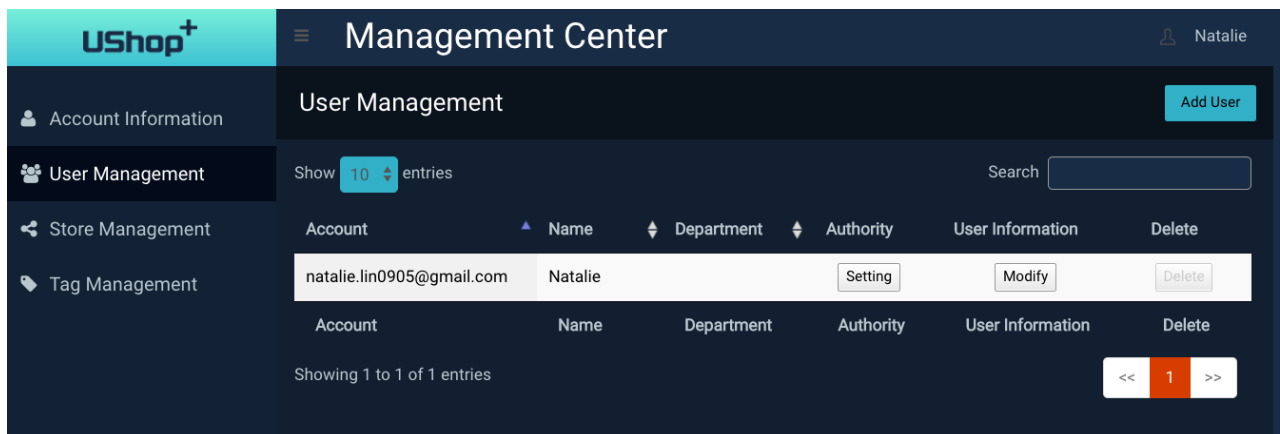
- **Setting Process:**
  - "User Management" webpage is displayed as default setting when the user enters the "Management Center".
  - Functional modules of "User Management" are shown at the upper left-hand corner of the webpage.
  - Current user name is shown at the upper right-hand corner of the "User Management" webpage, click on the

user name, the "User Information" dialog box will appear, and the user can change password and sign out with it.
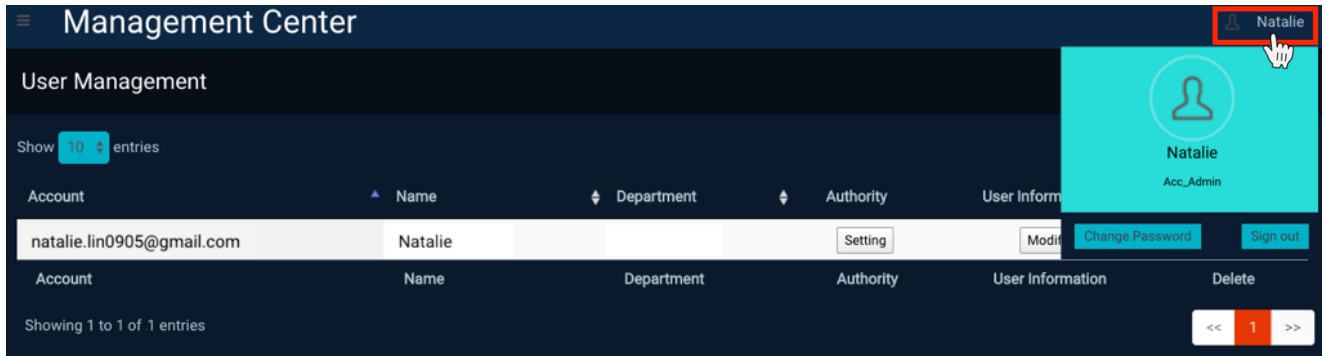
4.2 **User Management**

Enter the "User Management" module, the users that authorized by the administrator will be listed.

■ **Page Data**

Users can set "How many entries" to be displayed on each page according to their usage habit, the number of page data can be set at 10/25/50/100 per page on the "User Management" webpage.
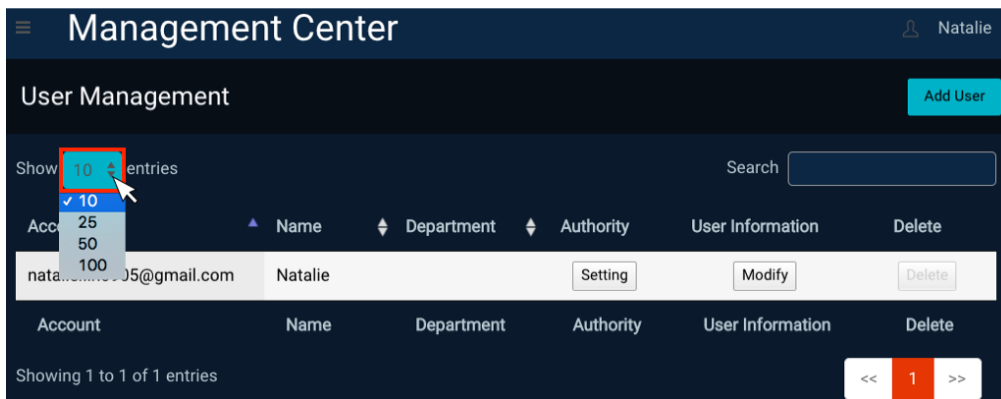
■ **Search Authorized User**

The administrator can search for a certain authorized user via "Search" text box at the upper right-hand corner of "User Management" webpage. Fuzzy query is supported.
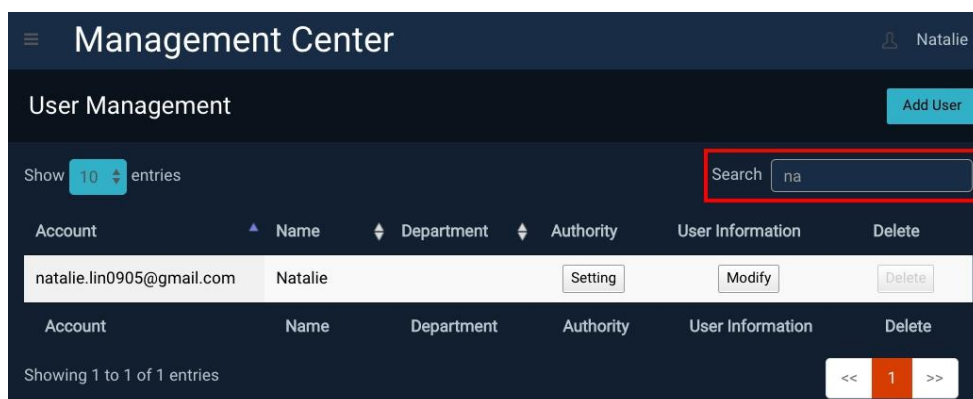
- **Add User**

  Click the **Add User** "Add User" button at the upper right-hand corner of "User Management", an "Add User" dialog box will soon appear.

Add User Settings:

1. Role*: Required item, a role must be chosen from the drop-down menu
   "System administrator" is allowed to add/modify/delete "Manager" and "General User"
   "Manager" is allowed to add/modify/delete "General User"
   "General User" has no authority to access "Add User" function

2. Account (Email Address) (Login Account)*: Required item, it is used to register user's login account.

3. Password*: Required item, please enter an eligible password.

4. Confirm Password*: Required item, please enter the eligible password again.

5. Name*: Required item, please enter an eligible user name.

6. "Department", "Title", "Telephone", "Mobile" and "Description" are non-required items. It is suggested to enter correct information for the convenience of future inquiry.

7. Click the "Submit" icon, and the information that just has been added will be shown on the "User Information".

- **User Settings**

  The administrator can assign and cancel the accessibility of stores to the authorized users in the user list on the "User Management" webpage via clicking the "Setting" button to the right of each user's title. An "Authority" dialog box will be brought out.
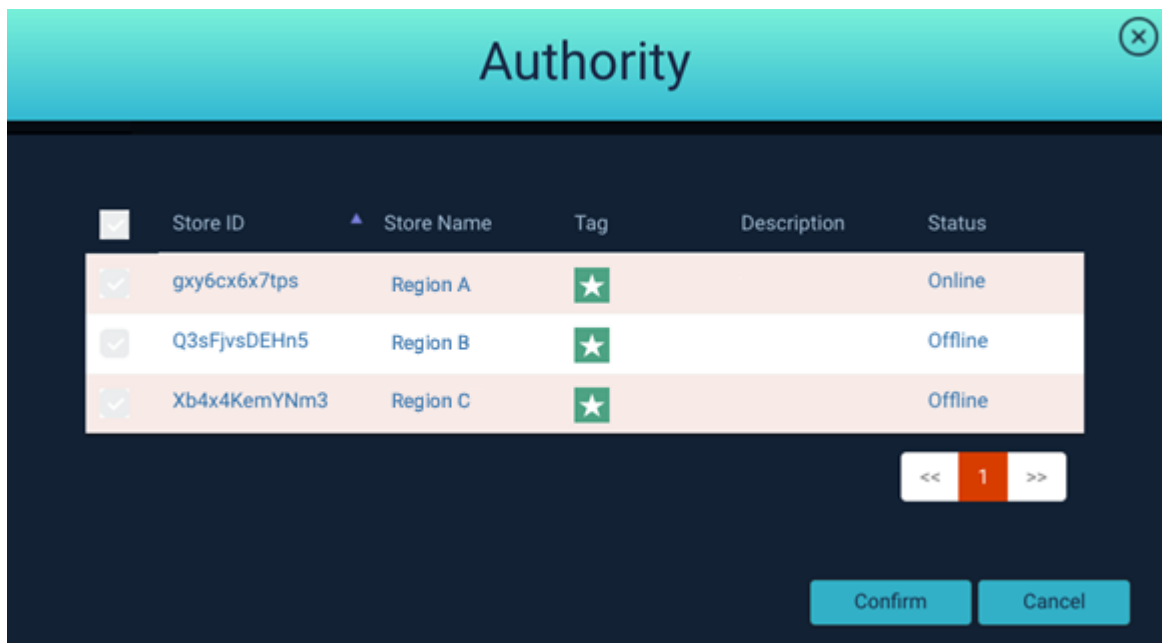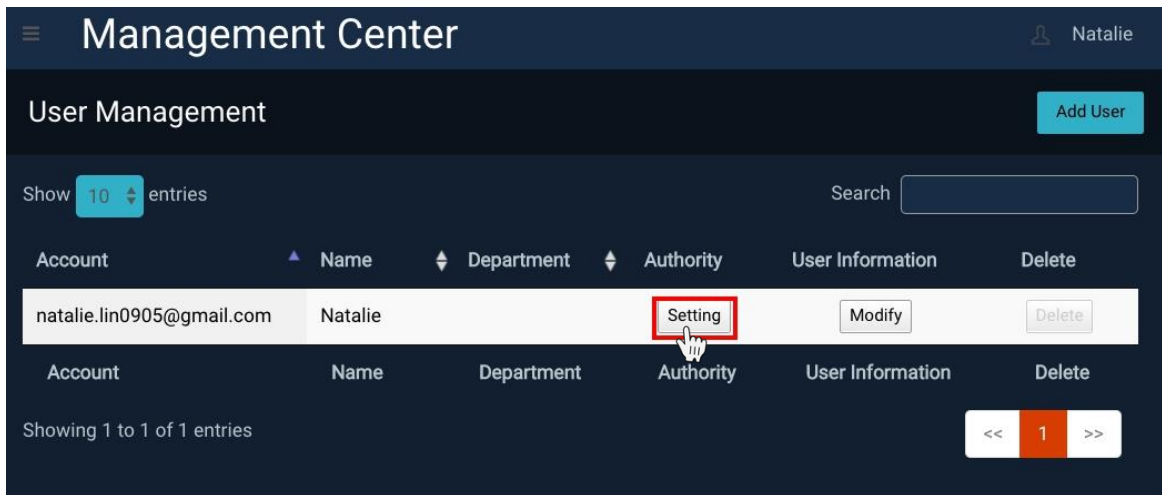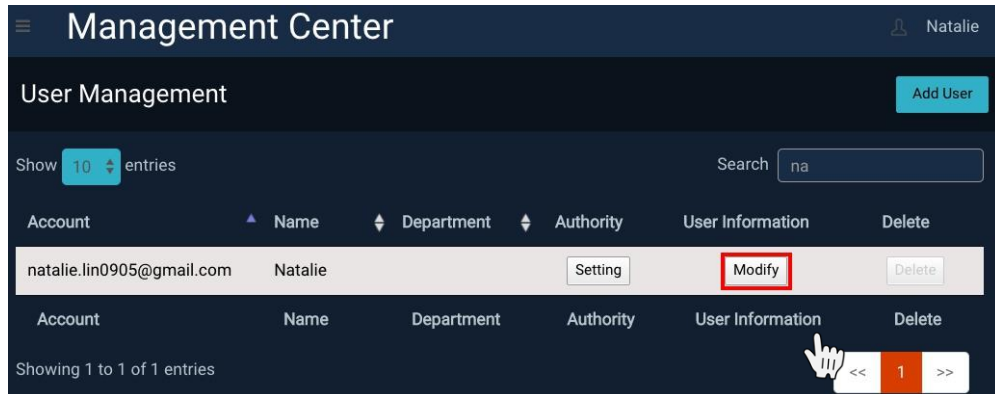

Authority Settings:

1. The setting dialog box shows all stores and their corresponding setting status according to the authorization of the administrator.

2. Tick the checkbox of "Store ID" of the selected stores to authorize the user with accessibility to certain stores. The administrator can use "Tick" and "Cancel" checkboxes, and click "Confirm" to finish the authorization settings.

3. Click the "Cancel" icon to quit the all the authorization settings, and go back to the "User Management" webpage.

■ **Modify User Information**

User information can be amended via clicking the "Modify" button to the right of each user's title. After clicking the "Modify" button, the "User Information" dialog box will then appear.

User Information Settings：

1. Enter eligible information to each field, and click the "Submit" button to finish updating user information.

2. Click "Cancel" to quit all the settings, and go back the "User Management" webpage.

- **Delete User**

    User can be deleted via clicking the "Delete" button to the right of each user title. After clicking the "Delete" button, the "Delete User" dialog box will then be brought out.
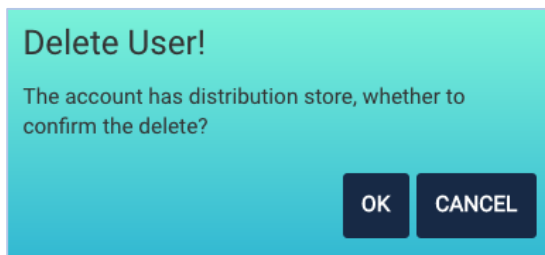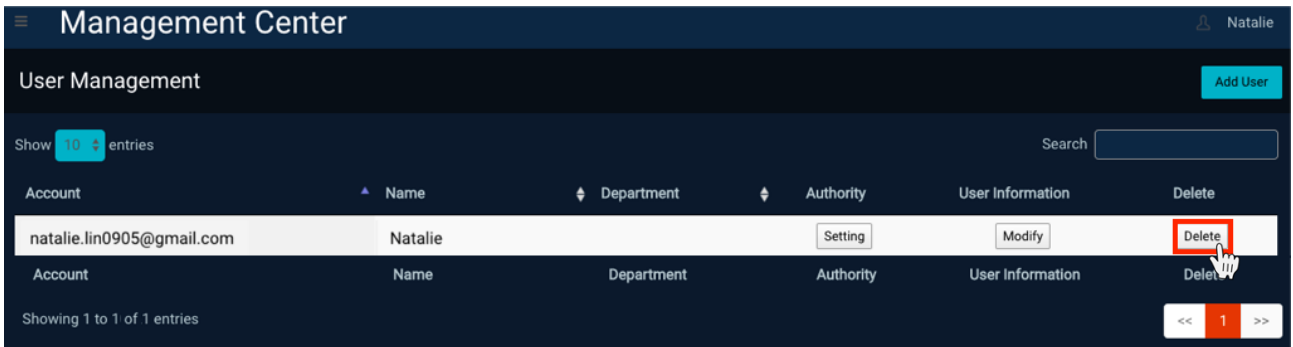
    A message, "The account has distribution store, whether to confirm the delete? ", will be displayed in the dialog box of "Delete User", click "OK" to delete while click "CANCEL" to quite the deletion.

4.3 Store Management

    Enter the "Store Management" module, a store list that authorized to the user will be displayed as default setting. The surveillance cameras status and current situation of the stores are listed. Fuzzy query is also supported in this webpage.
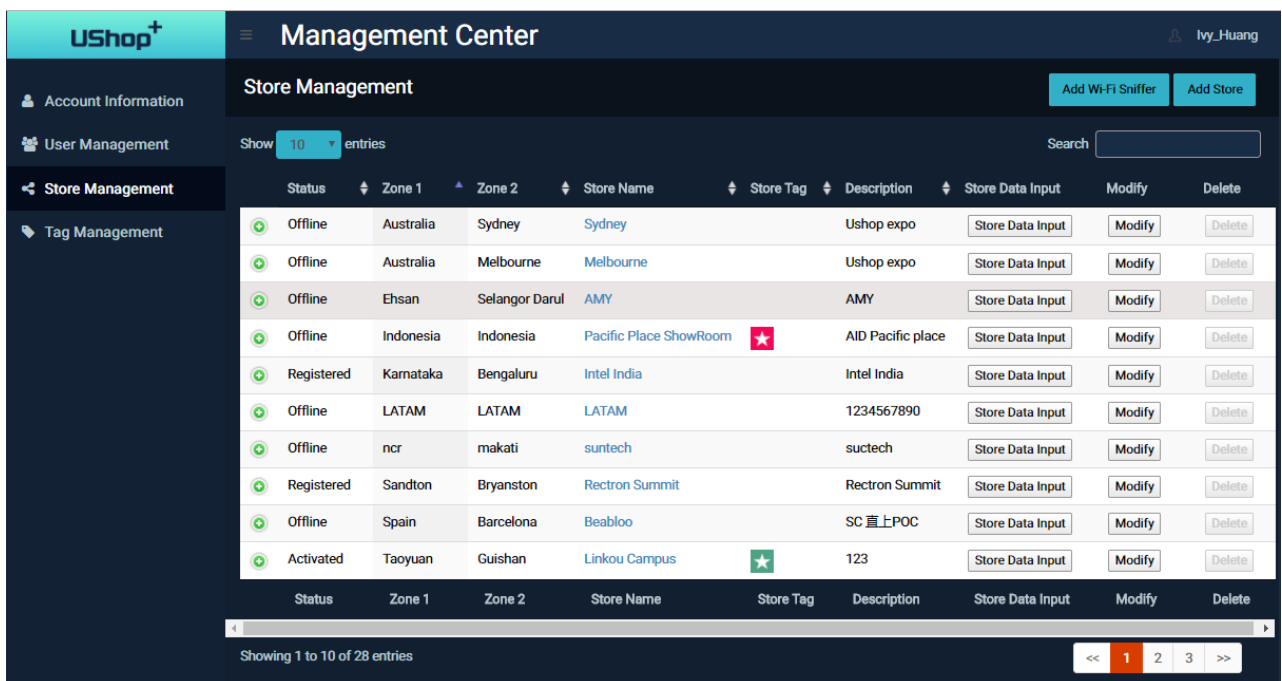
■ **Store Information**

Click the "Store Name" of which the user wants to view in the list, a "Store Information" dialog box will then be brought out.

■ **Add Store**

Click the "Add Store" button at the upper right-hand corner of "Store Management" webpage, the "Add Store" dialog box will be brought out.

Add Store Settings:

1. Country*: Required item, please enter the country which the store located, and it must be an eligible information.

2. Zone1 *: Required item, please enter the city where the store located, and it must be an eligible information.

3. Zone 2*: Required item, please enter the city where the store located, and it must be an eligible information.

4. Store Name*: Required item, please enter eligible information as requested.

5. "Store Tag", "User Tag" and so forth are the optional items. It can be filled for the convenience of future inquiry.

6. Weather Location*: Required item, please enter correct and eligible address details of the store as requested.

7. Store Address*: Required item, please enter correct and eligible address details of the store as requested.

8. Telephone*: Required item, please enter the phone number of the store as requested.

9. Description*: Required item, please put remarks of the store in this field, and it must be legal content.

10. Click "Submit" to transmit the information just been filled, and it will be shown on the store list then.


- **Input Store Data**

  Store management related data can be uploaded via clicking the "Store Data Input" button to the right of each store title on the "Store Management" webpage. After clicking the "Store Data Input" button, the "Store Data Input" dialog box will appear. There are three store management data for the user to set up including POS data, Human resource schedule and retails status.

POS Data Settings: "POS Total Amount", "Transactions"& "Product Number".

1. Date: Select the date of the data.
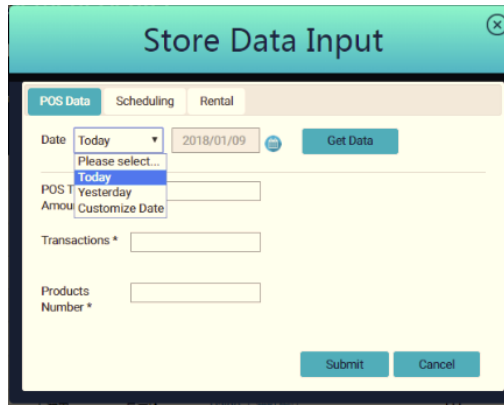
2. POS Total Amount*: Required item, please enter the total amount of POS for the selected date, and it must be an eligible information.

3. Transactions*: Required item, please enter the number of transactions for the selected date, and it must be an eligible information.

4. Product Number*: Required item, please enter the number of items sold for the selected date, and it must be an eligible information.

5. Get Data: Click the button to retrieve the POS data of the selected date.

6. Click "Submit" to transmit the information just been filled.

7. Click "Cancel" to quit all the settings, and go back to the "Store Management" webpage.

▪ **Modify Store**

Store information can be amended via clicking the "Modify" button to the right of each store title on the "Store Management" webpage. After clicking the "Modify" button, the "Modify Store" dialog box will appear.

Modify Store Settings:

1. Enter eligible information in each field (Store IP is detected automatically, cannot be adjusted), and click the "Submit" button to finish changing store information.

2. Click "Cancel" to quit all the settings, and go back to the "Store Management" webpage.

4.4 Tag Management

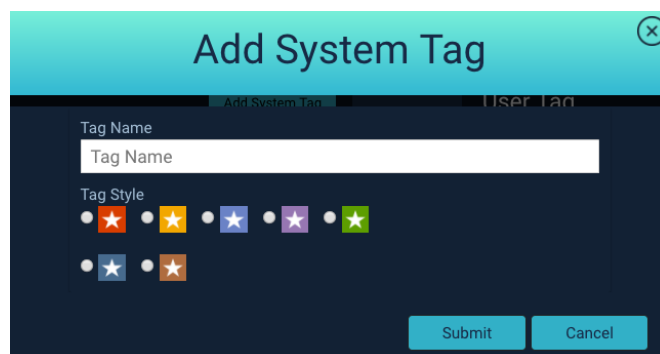Enter the "Tag Management" module, "System Tag" and "User Tag" will be displayed as default setting.
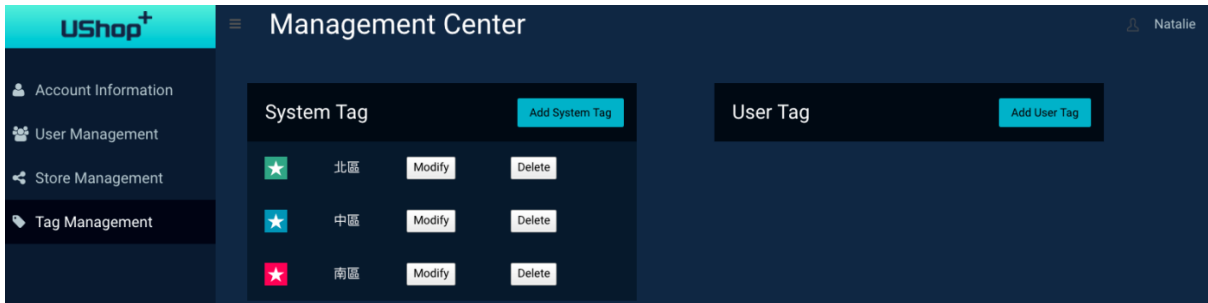
> **Caution:**
>
> Only administrator can Add/Modify/Delete System Tag.

- **Add System Tag**

"Tag Management" allows maximum 10 tags. To bring out "Add System Tag" dialog box, please click the "Add System Tag" button.
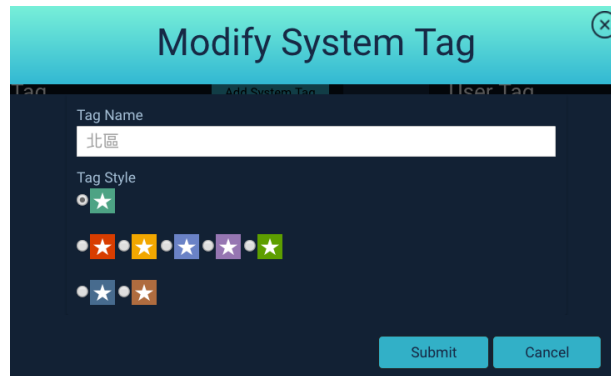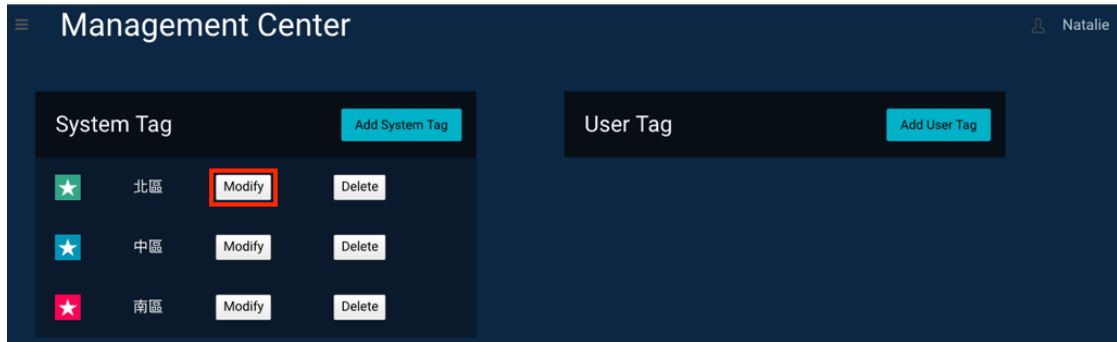

Add System Tag Settings:

1. Give a name to the new tag and enter it in "Tag Name" field.

2. Select and tick "Tag Style".

3. Click the "Submit" button to finish settings. The information of newly added tag will be shown on the list of "System Tag".

- **Modify System Tag**

  Click the "Modify" button to the right of selected tag on the "Tag Management" page, the dialog box of "Modify System Tag" will appear.


  Modify System Tag Settings:

  1. Change tag name by entering a new name for the tag at the "Tag Name" field.

  2. Change tag style by ticking the checkbox of the designated style, and click the "Submit" button to finish the modifications.

  3. Click the "Cancel" button to quit the modifications and go back to "Tag Management" webpage.

- **Delete System Tag**

  Any tag that's been listed on the webpage can be deleted via clicking the "Delete" button to the right of each tag name. After clicking the "Delete" button, the "Delete Tag" dialog box will be brought out.
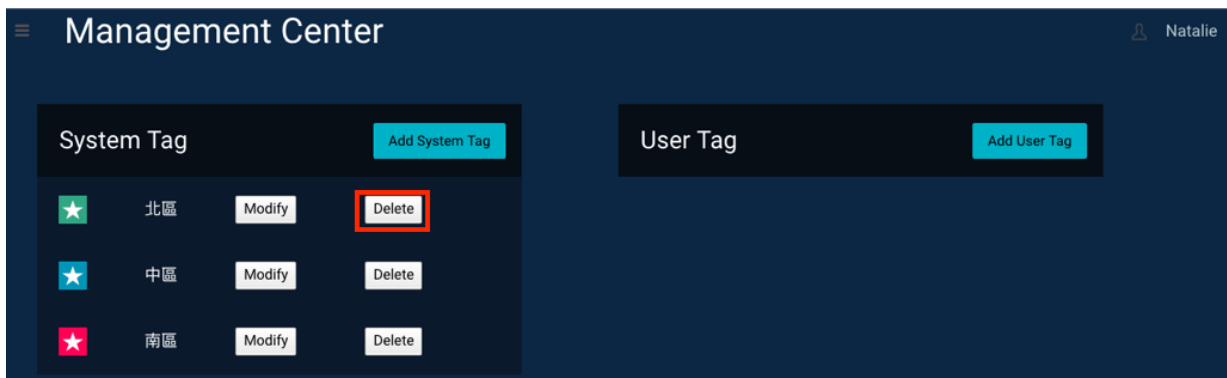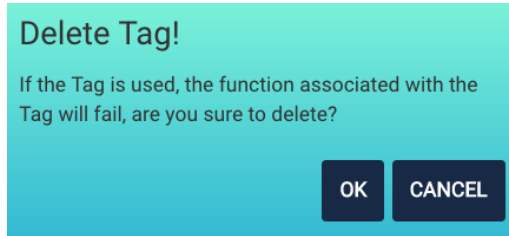
A message, "Delete Tag! If the Tag is used, the function associated with the Tag will fail, are you sure to delete? ", will be displayed in the "Delete Tag" dialog box, click "OK" to delete while click "CANCEL" to quit the deletion.

▪ **User Tag**

Settings of the "User Tag", such like "Add", "Delete" and "Modify", are the same as "System Tag".

> **Caution:**
>
> User Tag setting will be stored with every user independently.

5. Remarks

1. Predominately compatible with Chrome Edge, compatibility with other type or version browsers is not guaranteed.

2. Key information that needs to be entering by users has been checked for its legality, please follow the instruction and enter correct information.