

phobio

en Français

in English

(following pages)



SMART & SIMPLE

User Guide

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About Phobio

Everything can be better, and that is **where value is found**.

We seek to create WIN/WIN partnerships. We win by helping our partners become better at what they do.

We use creativity and innovative technology to **reshape the retail experience** and create more value in that interaction.

Faithfully fulfilling these goals requires constant investigation and innovation. This is what we look forward to doing every day, and achieving these goals is what inspires us.

Phobio's flagship service is Phobio Safetrade™, a handset trade-in program for wireless retailers to use at the point-of-sale which handles all aspects of device trade-in seamlessly, and embodies this dedication to enhance that space between the consumer and the retailer:

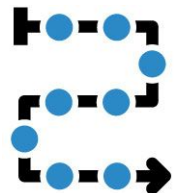
- Providing customers with more buying power than they had before.
- Providing sales people with more opportunities to delight their customers.
- Providing the retailers with more revenue to grow their business.



It's not any one thing—it's the **many things** we do to create more value for retailers.

We're experts in all the areas of operation that make up an excellent trade-in service. We build our own software, manage our own international disposition channels and everything in between.

From the very beginning, we set out to create the most value to retailers, and innovated a hundred ways to do it at every step in the process with rigor, discipline and creative thinking.



Phobio creates more value and **substantially more revenue** for you.

The results are a trade-in program with a continual track record in our industry of:

- Lowest Adjustment/Discrepancy Rates
- Highest Attachment Rates
- Competitive pricing on over 3000 devices
- Highest prices for non-optimal (poor condition) devices
- Most adaptive, customizable, and extensible software
- Most robust analytics and reporting capabilities
- Comprehensive OEM Lock Solution



Phobio's vision is to provide the best software and services that empower the people of retail.

WHO

We are an international team of spirited entrepreneurs who love people, technology and solving problems.

WHAT

We create the most value for retailers through specialized retail services that empower the people of retail and enhance their performance

HOW

We listen to retailers and provide solutions with lean operations, simple technology and insanely great support

WHY

The best use of our energy, expertise, and creativity is in the continual improvement of the retail experience.

Phobio's software is available in the currencies and languages for American English, British English, Canadian French, German, Italian, and simplified Chinese.

Phobio's trade-in program is enjoyed by retailers throughout the United States, Canada, Australia, and Europe.



We're experts in all the different areas of operation that make up an excellent trade-in service.

We build our own software, manage our own international disposition channels, and everything in between.

HOW WE ROLL



Trade-In Overview

Phobio trade-ins help your Sales Reps close more sales and sell more high-margin accessories and services by giving customers immediate store credit for trade-in of their old devices. One of the most important aspects of a trade-in program is *maintaining a low Adjustment Rate*. The Adjustment Rate is the percentage of difference between the value of a device as-assessed in the store by the Sales Rep and given to the customer versus the final, inspected value of the device received at Phobio. Phobio's simple inspection process, online training, and reporting and support process are all geared towards maintaining low Adjustment Rates for our partners.

USERS

Every user of Phobio has an unique account and login, and every user must complete the Phobio Online Training specific to their company to have their Phobio account activated.

LOCATIONS AND TRADES

Every one of your store locations has a location set in Phobio. Each user is set to their default location, but can log in to any location, as many Sales Reps and Managers work at multiple locations. Every trade-in goes into the "Invoice Inventory" of the location at which the trade-in was performed.

PRICING AND CONDITIONS

The trade-in values on devices are live data updated regularly. Phobio's prices are always competitive—especially for Damaged devices. Our device conditions are simple and straightforward to ensure your Sales Reps can accurately assess devices at the point-of-sale. You do not need to do test calls, check Bluetooth, etc. and you do not need to include cables or other peripherals for the devices. Each product description in Phobio contains tips and instructions on accurately identifying devices and checking their condition.

Working: fully functional device with typical wear and tear

Damaged: broken or missing parts, software problems, non-functional, water-damaged

Devices must have iOS Locks (i.e. Find My iPhone, Android Device Protection) and/or OEM Locks deactivated to be eligible for trade-in.

PAYMENTS

Phobio pays your company for devices received typically via ACH. Payments are typically made monthly for all devices received in the previous month.

INSPECTION REPORTS AND ADJUSTMENTS

If there are any adjustments to a trade-in, our inspectors describe the adjustment, take documenting photos, and immediately email that information to the Sales Rep who created the trade. (These adjustment alerts can also go to the Store Manager and/or any loss prevention staff you require.) This allows the Sales Rep ample time to address issues if needed with our Support Team.

SHIPMENTS

The trade-in value for a device is guaranteed for 21 days from the date of trade-in to the day of receiving at Phobio (provided there are no adjustments based on actual model or condition, of course). Through Phobio's web tools (<http://phobio.com>), users may create shipments to Phobio of the devices collected at their location and print pre-paid shipping labels to send to Phobio (Fed Ex Express, UPS, Purolator, Toll Priority, DHL Express). Phobio also provides your stores with Shipping Supplies and can help arrange regular pickups if needed.

SUPPORT

Phobio's Live Chat Agents are available 24/7 to help you assess devices, answer questions, and resolve problems. Additionally, you can email support@phobio.com to create Support Tickets for inquiries which are not as time-sensitive as those at the point of sale. Support Tickets are answered and often resolved within 2 hours, and Live Chats are answered within 30 seconds.

Phobio-powered trade-ins are a powerful closing tool designed to help you increase sales and activations.

Here's how the process works:

1. You collect devices from a customer and issue **immediate store credit** for the trade-in value.
2. You **unlock the device and erase the data**, and hand those trade-ins and their printouts to your Store Manager for shipment.
3. Your devices are shipped to Phobio and must be received within **21 days of the trade-in** to ensure the price guarantee.
4. Phobio pays your company for the devices received.



Phobio's Trade-In values are **always competitive**.

But customers may think they can get more value for their devices on eBay or Consumer Trade-In sites. Trading in *with you through Phobio* allows them to:

- avoid shipping costs
- avoid dealing with unknown buyers
- avoid exposing themselves to unexpected downgrades of their device's value and lower payments AFTER they have already shipped it away
- benefit from the full value immediately
- benefit from the personal data-security of our process

All the devices that are received by Phobio are wiped of personal data and are either refurbished and resold or recycled in an environmentally-friendly manner.

Trade-ins through Phobio:

- help reduce e-waste
- help you increase your overall sales.

Trade-In Process via Safetrade Web

Within 24 hours of completion of the Online Training for your company, you will be emailed your login credentials to Phobio: <http://phobio.com>

STEP 1 - Select the Model for Trade-In

Enter in the IMEI of the device for trade-in. *(Phone will display IMEI when you dial *#06#)*

SafeTrade will:

- automatically detect the appropriate Model options for that device **(reducing Model Error Adjustments)**
- check against the international Lost/Stolen Blacklists to verify the device is clear for trade

If the device has no IMEI or it cannot be found, click the select **Search By Model** link and enter in the device model number or common name.

The screenshot shows the Phobio web interface. At the top, there's a navigation bar with 'Phobio' logo, 'Live Chat', 'Contact Support', 'US Logistics HQ', and a user profile 'Denny J.'. Below this is a secondary navigation bar with icons for 'Trade', 'Processing', 'Reporting', 'Training', and 'Admin'. The main content area is titled 'Trade Process' and contains a 'Search by IMEI Number' form. The form has a search icon, the title 'Search by IMEI Number', and instructions: 'Enter a device IMEI number to verify device details and start trade process. Phone will display IMEI when you dial *#06#.' There is a text input field containing '01304408884424' and a 'Submit' button. A link at the bottom says 'Can't find your device or IMEI not available? Search by model name.' A 'Cancel Trade' button is in the top right corner of the form area.

Then select the carrier and memory capacity of the device.

The screenshot shows the 'IMEI Product Results' form in the Phobio interface. It has the same top navigation as the previous screenshot. The form is divided into two sections. Section 1, 'Select Carrier', shows buttons for T-Mobile, AT&T, Rogers, Telus, Optus, Telstra, Vodafone, Verizon (which is highlighted in blue), and Skip. Section 2, 'Select Capacity', shows buttons for 16GB, 32GB, 64GB (which is highlighted in blue), and Skip. A 'Cancel Trade' button is in the top right corner of the form area.

STEP 2 - Select the Device Condition

Inspect the device and select the appropriate condition. The product descriptions will assist you.

Phobio only has only 2 simple, objective device condition options: *Working* or *Damaged* (**reducing condition errors**)

Does it power on? Is there visible damage? Does it have Water Damage?

The screenshot shows the 'Trade Process' screen in the Phobio application. On the left, there are images of an iPhone 5S. Below the images, the manufacturer is listed as 'Apple', the model as 'Apple iPhone 5S 64GB Verizon', and the IMEI/ESN is displayed with a checkmark. On the right, a yellow box titled 'Apple iOS Lock' contains a warning: '"Find my iPhone" must be disabled to receive full credit for this device. Devices with iOS/OEM Lock activated should not be accepted for trade-in.' Below this, two condition options are presented: 'Working' for \$200.00 and 'Damaged' for \$84.00. The 'Working' option includes a description: 'Functional and original device free of physical damage, software problems, and water damage.' The 'Damaged' option includes a description: 'Device has physical damage (cracked screen or broken parts), software problems, and/or signs of water damage.' A 'Next' button is located below the condition options. At the bottom, there is a link: 'Is this not your device? Tell us via chat. [Search by model name.](#)'

STEP 3 - Enter Customer Data

Fill in the Customer Information for this trade-in.

You can also enter an Internal Reference Number for your trade-in in the **Invoice Reference** field. Typically, the internal reference entered is the unique number from the actual Bill of Sale generated by your in-store POS. This allows an additional "mutual-reference" between your individual sales transactions and their associated trade-ins.

If you have a CUSTOMER COUPON or PROMO CODE to enter, simply click the **Add Promo** button and enter it there.

Check the **Agree to Terms and Conditions** checkbox and complete the trade-in.

Fill in Customer Information, enter *Promo Codes* which may apply to this transaction, and agree to the *Terms and Conditions*. (**providing easy promos**)

The screenshot shows the 'Trade Process' screen with customer information entered. The device details on the left remain the same. On the right, the 'Customer Information' section includes fields for First Name (John), Last Name (Doe), Email (jdoe@email.com), Phone Number (5555555555), ID Number (87575657676556), and ID Type (Driver's License). There is an 'Add Promo' button. At the bottom, there is a checkbox for 'Agree to Terms & Conditions (Details)' which is checked, and a 'Quote Total: \$200.00' with a 'Next' button.

STEP 4 - Data Erasure

Phobio

Live Chat
Contact Support
US Logistics HQ
Denny J.

Trade
Processing
Reporting
Training
Admin

Cancel Trade

Clear Quote

×

iPhone 5S 64GB Verizon

\$200.00

COMA

Condition: Working

IMEI: 0123456789012345

Add Another Device

Erasure Instructions

Find my iPhone *must* be disabled on this device to receive trade-in credit.

- From the home screen, tap *Settings*
- Scroll down and select *iCloud*
- Scroll down and deactivate *Find My iPhone* -- **This will require the customer's iCloud login information**

If your customer has forgotten their Apple ID Password, they can reset it at: <http://iforgot.apple.com>

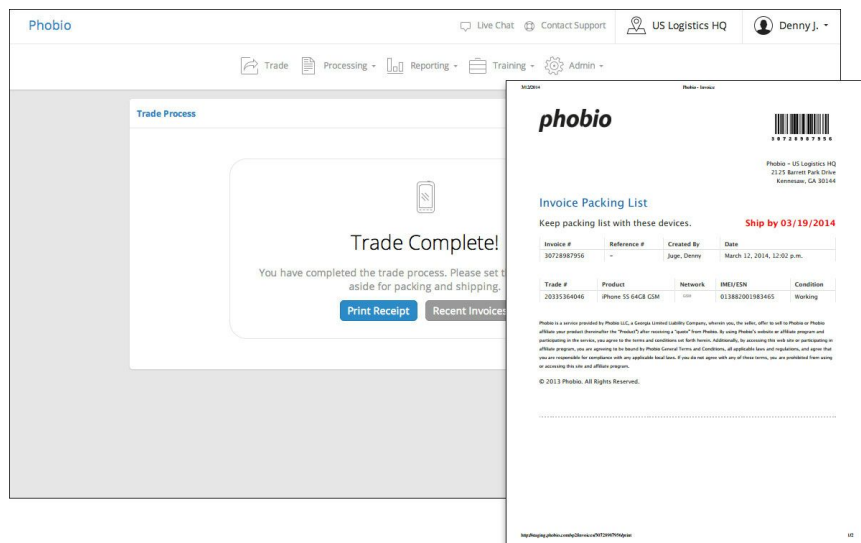
Once unlocked, you can erase the data from this device.

- Go back to *Settings*
- Select *General*
- Scroll to bottom and select *Reset*
- Tap *Reset All Content and Settings*
- If prompted, enter the user's password then tap *Erase Phone*. The device will reset.

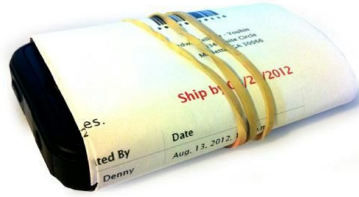
☒ I verify that all erasures are complete and 'Find My iPhone' has been turned off.

Confirm

There will be 2 printouts: one which may be given to the customer, and the other **printout must be kept with the device** for storage and shipment to Phobio. This printout displays the **Phobio Trade-In Number** which is crucial when received at Phobio for matching the device with the trade-in transaction you just performed. It also displays the suggested “ship by” date to ensure the price guarantee.

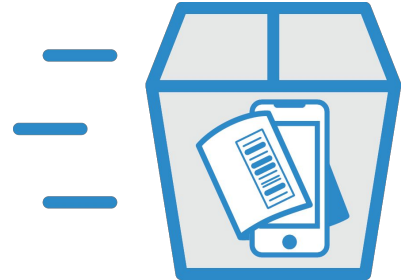


8



STEP 6 - Store and Ship

Hand the device and paperwork to your Store Manager for secure storage and shipment to Phobio's Receiving facilities.

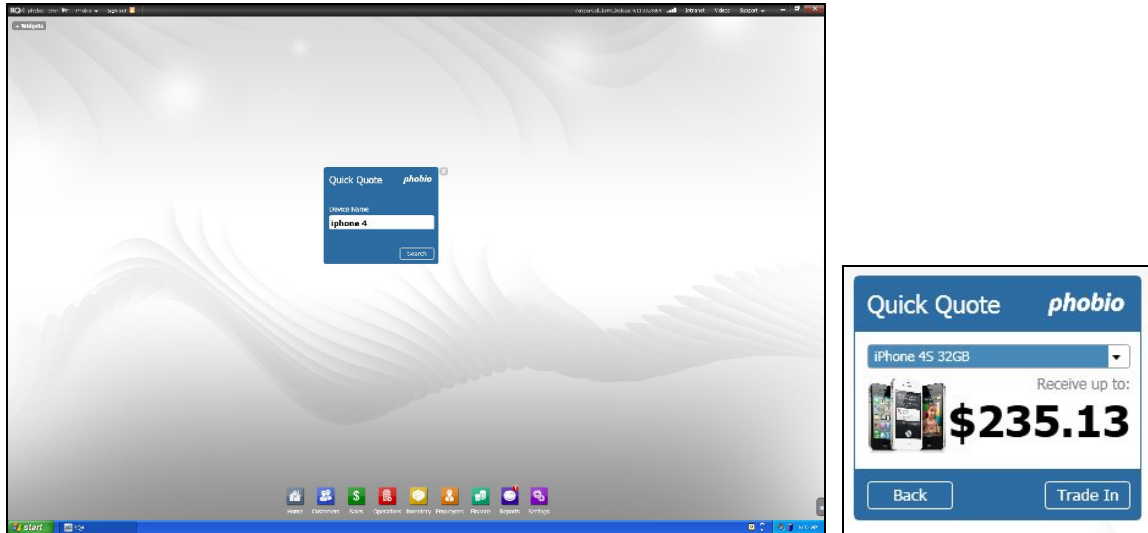


Trade-In Process via RQ

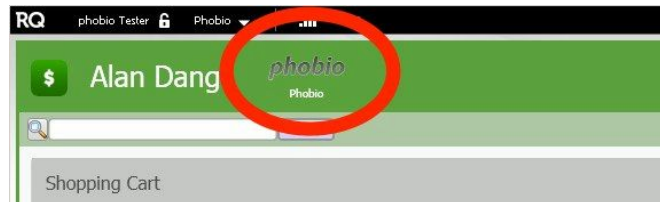
Upon completion of the Online Training, your in-house RQ4 Admin will be informed to enable Phobio trade-ins for your RQ4 Profile, which will automatically create a Phobio Account for you.

Phobio's Integration with RQ4 makes trade-ins quick and simple.

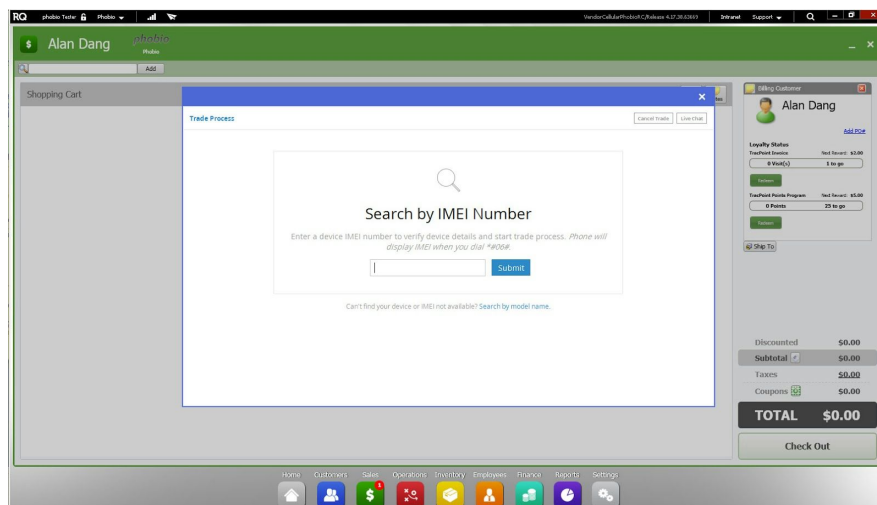
Install the PHOBIO QUICK QUOTE WIDGET on your dashboard to be able to quickly search for a customer's device and give them a potential trade-in value. You can initiate a Trade-In and Sale from there.



To create a trade-in, click the **Phobio** button during a sale to add a trade-in for your customer...



The trade-in wizard will launch...



STEP 1 - Select the Model for Trade-In

Enter in the IMEI of the device for trade-in. (Phone will display IMEI when you dial *#06#)

Safetrade will:

- automatically detect the appropriate model options for that device (**reducing Model Error Adjustments**)
- check against the international Lost/Stolen Blacklists to verify the device is clear for trade (**preventing fraudulent trades**)

If the device IMEI cannot be found, you can *keyword search* for the device model.

The screenshot shows a web interface titled "Trade Process". It has a search bar with a magnifying glass icon and the text "Search by IMEI Number". Below the search bar is a text input field and a "Submit" button. A red arrow points from the text "enter IMEI" to the input field. Below the search bar, there is a link that says "Can't find your device or IMEI not available? Search by model name." A red arrow points from the text "search by model" to this link. The interface also includes "Cancel Trade" and "Live Chat" buttons in the top right corner.

Select the Carrier and Memory Capacity of the device or select the appropriate device from the resulting list of model options...

The screenshot shows a web interface titled "IMEI Product Results". It has two sections: "1 Select Carrier" and "2 Select Capacity". In the "Select Carrier" section, there are four buttons: "Verizon", "AT&T", "T-Mobile", and "Skip". In the "Select Capacity" section, there are four buttons: "16GB", "32GB", "64GB", and "Skip". The interface also includes "Cancel Trade" and "Live Chat" buttons in the top right corner.

or

The screenshot shows a web interface titled "IMEI Product Results". It displays a list of product options with columns for "Product", "Popularity", "Working", and "Damaged". The list includes various Apple iPhone 5S models with their respective prices and details. The interface also includes "Cancel Trade" and "Live Chat" buttons in the top right corner.

Product	Popularity	Working	Damaged
Apple iPhone 5S 16GB Verizon	Popularity bar	\$250.00	\$113.00
Apple iPhone 5S 16GB GSM	Popularity bar	\$250.00	\$113.00
Apple iPhone 5S 32GB Verizon	Popularity bar	\$260.00	\$117.00
Apple iPhone 5S 32GB GSM	Popularity bar	\$260.00	\$117.00
Apple iPhone 5S 64GB Verizon	Popularity bar	\$270.00	\$122.00
Apple iPhone 5S 64GB GSM	Popularity bar	\$270.00	\$122.00

STEP 2 - Select the Device Condition

Inspect the device and select the appropriate condition. The product descriptions will assist you. Phobio only has only 2 simple, objective device condition options: *Working* or *Damaged*

Does it power on? Is there visible damage? Does it have Water Damage?

The screenshot shows the 'Trade Process' window. On the left, there are images of an iPhone 5S and its packaging. Below the images, the manufacturer is listed as 'Apple' and the model as 'Apple iPhone 5S 64GB Verizon'. The condition selection area on the right has a yellow warning banner for 'Apple iOS Lock' stating that 'Find my iPhone' must be disabled. Below this, two options are presented: 'Working' for \$200.00 and 'Damaged' for \$84.00. Each option includes a brief description of the condition. A 'Next' button is located below the 'Damaged' option. At the bottom, there is a link to 'Search by model name'.

STEP 3 - Enter Customer Data

Fill in Customer Information, enter any *Promo Codes* which may apply to this transaction, and agree to the *Terms and Conditions*.

The screenshot shows the 'Trade Process' window with the 'Customer Information' section active. On the left, the selected item is 'iPhone 5S 64GB GSM' with a price of '\$270.00'. The customer information form includes fields for 'First Name' (John), 'Last Name' (Doe), 'Phone Number' (555-555-5555), 'ID Number' (798685686), and 'ID Type' (Driver's License). There is an 'Add Promo' button. At the bottom, there is a checkbox for 'Agree to Terms & Conditions' and a 'Quote Total: \$270.00' with a 'Next' button.

STEP 4 - Data Erasure

Follow the device-specific Erasure Instructions displayed...

The screenshot shows a 'Trade Process' window with a blue header and a close button. On the left, there's a 'Clear Quote' button and a device listing: 'iPhone 5S 64GB Verizon' for '\$200.00'. Below this, it says 'Condition: Working' and 'IMEI: 35839207182445'. There's an 'Add Another Device' button. On the right, under 'Erasure Instructions', it states: 'Find my iPhone must be disabled on this device to receive trade-in credit.' followed by a 3-step list: 1. Tap Settings, 2. Select iCloud, 3. Deactivate Find My iPhone. A bold note says 'This will require the customer's iCloud login information'. Below, it says 'If your customer has forgotten their Apple ID Password, they can reset it at: http://iforgot.apple.com'. Then, 'Once unlocked, you can erase the data from this device.' followed by a 5-step list: 1. Go back to Settings, 2. Select General, 3. Scroll to bottom and select Reset, 4. Tap Reset All Content and Settings, 5. Enter password and tap Erase Phone. At the bottom right is a 'Confirm' button.

And confirm Erasure...

The screenshot shows a confirmation dialog box with a blue header and a close button. It contains the text 'I verify that all erasures are complete' and two buttons: 'Cancel' and 'Confirm'. Below the dialog, the device details 'Condition: Working' and 'IMEI: 35839207182445' are visible. To the right, a 5-step list continues the instructions: 2. Deactivate Find My iPhone, 3. Then go back to Settings and click on Reset, 4. Select Erase All Content and Settings and confirm, 5. If prompted, enter the user's password then tap Erase Phone. At the bottom right is a 'Continue' button.

STEP 5 - Complete Sale and Print

Done! The amount of the trade-in value will be automatically deducted from your customer's Bill of Sale. Complete the sale.

If the trade-in value exceeds the Bill of Sale, then you should upsell accessories or other services as the trade-in value is a "use it or lose it" policy wherein they use the full value of the trade-in on that transaction with you or forfeit the remainder. There is no cash back or future credit.

Print out the paperwork for your customer and to store with the device. Print out the Phobio Paperwork with the receipt.

Sale				
Invoice: PHOBIN2				
Phobio		Tendered On: 13-Dec-2012 04:07 PM		
United States		Sales Person: phobio Tender		
		Tendered By: phobio Tender		
		Tendered At: Phobio		
Bill Totalling line				
Product SKU	Description	Tracking #	Qty	Your Price Your Total
ACAP000005	BLACKBERRY 8830 LEATHER CASE		1	\$24.99 \$24.99
SPHNS00001	Phobio Trade In	2080324596	-1	\$4.75 (\$4.75)
Payment:				Subtotal: \$20.24
Cash	\$20.24			
Change	\$0.00	Total: \$270.00		
Comments:				
Thank you for shopping at Successful Cellular. Please visit us online at successfulcellular.com				
Terms & Conditions				
*** All Phones are warranted through customer care or the manufacturer for 1 year and is up to their discretion				
*** No Merchandise can be returned without authorization & once authorized must be in perfect condition and complete with ALL accessories				
*** Any authorized exchanges are subject to no restocking fee within 3 days, and a \$20 restocking fee will be charged after 3 days.				
*** Any authorized returns are subject to a \$20 restocking fee within 3 days, and a \$20 restocking fee after 3 days.				
*** No returns or exchanges will be accepted after 30 days.				
Reward Program Reminder				
You've earned 5 points and redeemed \$0.00 in this purchase. Your total is 5 points. You can visit the store 1 more time(s) and earn \$2.00 off on a future purchase.				
Thankful Points Program: You've earned 20 points and redeemed \$0.00 in this purchase. Your total is 20 points. You can spend \$0.00 more on eligible items and earn \$5.00 off on a future purchase. Subject to program terms and conditions.				
Page 1 of 1 PHOBIN2				

Print 2 printouts: one which may be given to the customer, and the other **printout must be kept with the device** for storage and shipment to Phobio.

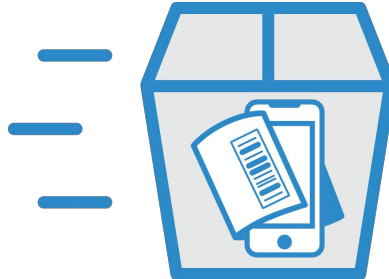
Suggestion: Wrap it around the device and secure with tape or rubber band.



This printout displays the Phobio Trade-In Number which is crucial when received at Phobio for matching the device with the trade-in transaction you just performed.

STEP 6 - Store and Ship

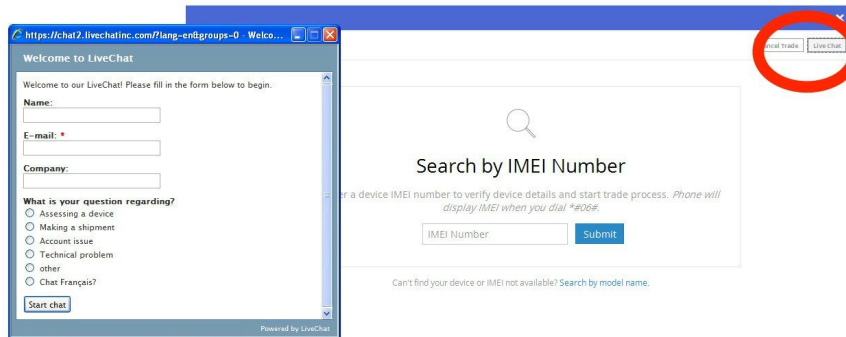
Hand the device and paperwork to your Store Manager for secure storage and shipment to Phobio's Receiving facilities.



24/7 Live Chat

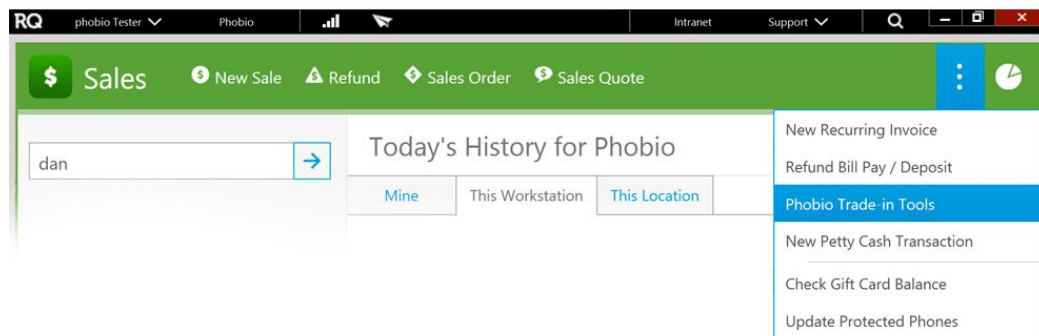
Not sure how to categorize a device? Have questions or issues? As always, Phobio's Support Team is there for you.

Just click **LIVE CHAT** to be connected immediately to our team who want to help you get it 100% right 100% of the time.



Phobio Tools link to Create Shipments, Access Reports, etc. for RQ users

Click on **Phobio Trade-in Tools** under the **utility** menu at the top right in the Sales application to access your account in **Phobio.com** to create or track shipments, order more supplies, access reporting tools, etc.



NOTE: For companies using Phobio Integration with RQ4, you can look up trade-in prices through Phobio.com, but the ability to perform trade-ins is deactivated. You can **only** be perform trade-ins through RQ4 and the trade-in products list is “read-only” in Phobio.com.

Assessing Devices

Simple Device Grading

Phobio has the simplest and most objective product pricing available. This makes the process easy for your Sales Representatives to correctly assess a device at the point of sale within seconds.



- properly powers on
 - device is not pin or passcode locked
 - intact and functional screen
 - all working buttons and ports
 - free of water damage
 - may have normal wear and tear
- water damaged
 - physical or software damage affecting normal operation
 - cracked/crushed screen
 - missing/broken parts

All devices must have iOS (Find My iPhone) and/or OEM Locks deactivated to be eligible for trade-in.

Phobio's working price covers over 70% of the devices traded in worldwide.

We do this because Sales Representatives in your stores will always want to offer the highest price possible, so it only makes sense to ensure this price is also the largest category.

Our damaged pricing is very aggressive and is the minimum for which a device qualifies.

Our simple pricing and grading scale ensure you will be able to pass along the **most value to your customer with the **highest accuracy rate** in the industry.**

4 device checks for every device:

1) Give it the Once-Over

Can you see obvious physical damage? Is the screen shattered or parts broken off? (ignore minor scratches and normal wear and tear)

- If YES: **"Damaged"**
- If NO ...

2) Kick the Tires

Is it **unable** to power on? And if it powers on, are there any obvious software problems that would make the device unusable?

- If YES: **"Damaged"**
- If NO...

3) Look under the Hood

Check for water damage (the insidious phone killer).

- If YES: **"Damaged"**
- If NO: **"Working"**

4) Disable iOS/OEM Locks





Finally, deactivate "Find My iPhone" on Apple devices, remove all passwords and erase the device.

Checking for Water Damage

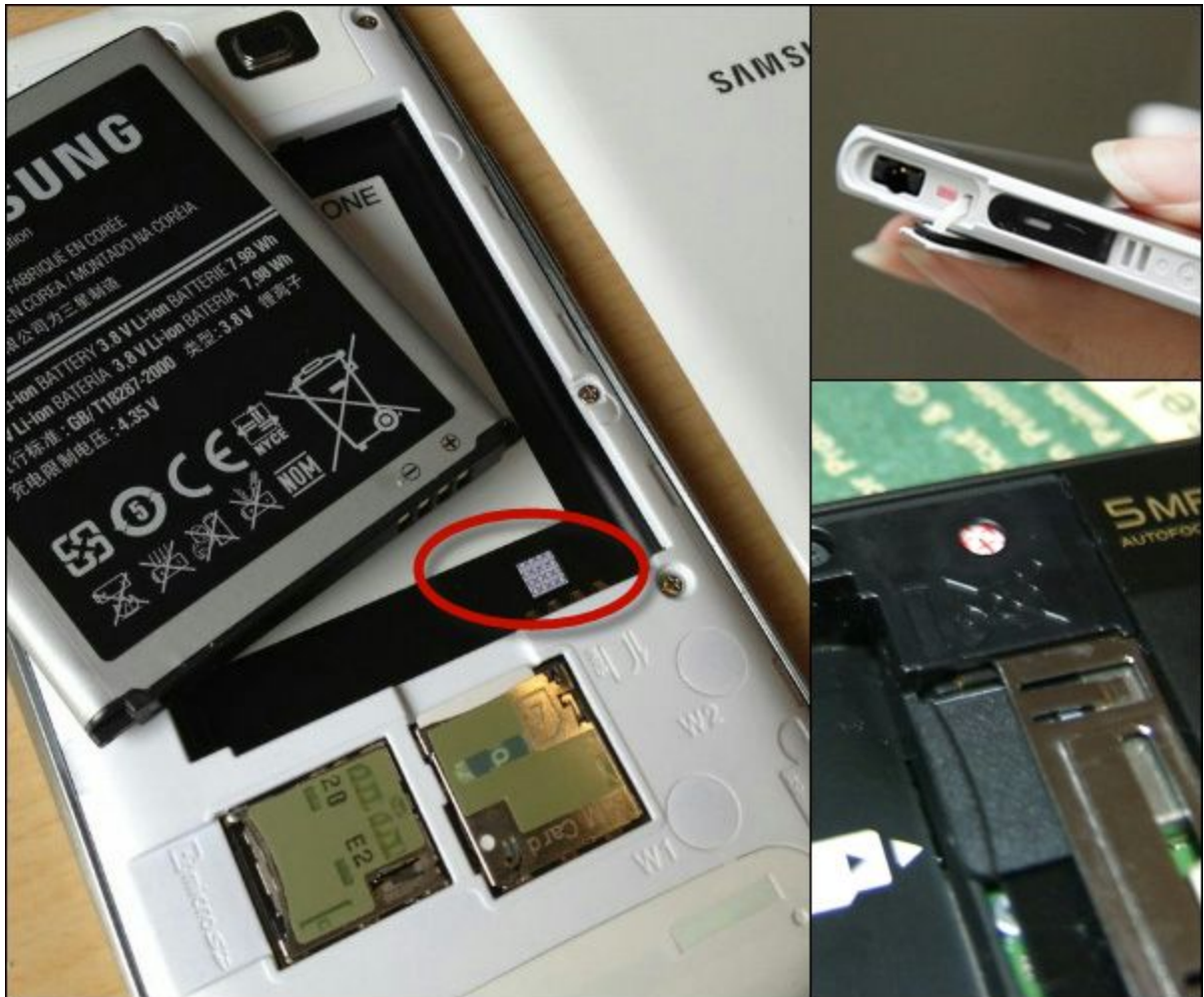
If it's an Apple product...

You'll need to check the ports for the water damage indicators which will turn red or pink if exposed to water -- otherwise they will be white or grey. So just look for red/pink in the ports. **If you see RED, then it is DAMAGED.**

"Find my iPhone" must be disabled to receive full credit for working iOS 7 devices, and it requires the customer's Apple ID and password, to do so, so must be performed at the point-of-sale with the customer.

Product	Liquid Contact Indicator location
iPhone 5	
iPhone 4 / iPhone 4S	
iPhone 3G / iPhone 3GS	
iPhone	

If the indicators get hit with liquid, the "X's" will fade to red or pink, and the white indicators will bleed red.

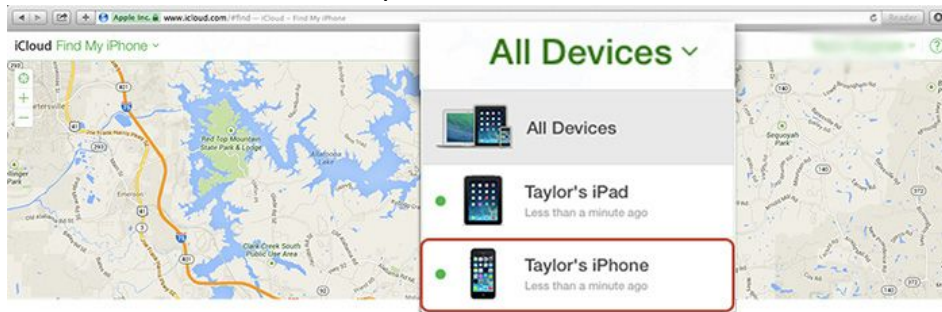


Remote Disabling Apple ID Locks

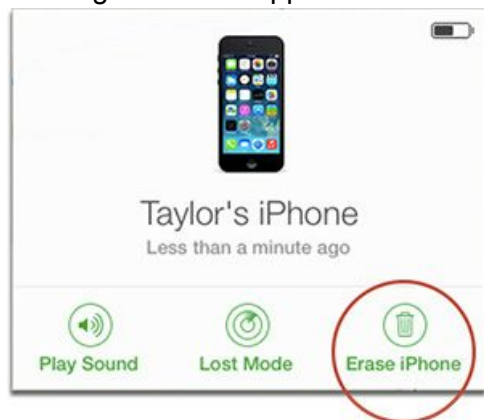
To Erase Your iPhone Remotely:

A walkthrough of these steps is available at: <http://training.phobio.com/find>

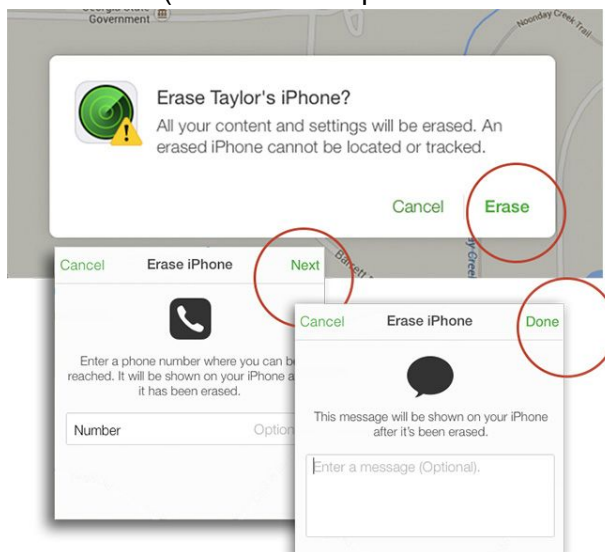
1. Go to <http://icloud.com/find> and log in with your Apple ID.
2. Click **ALL DEVICES** at the top and select the device that was traded-in.



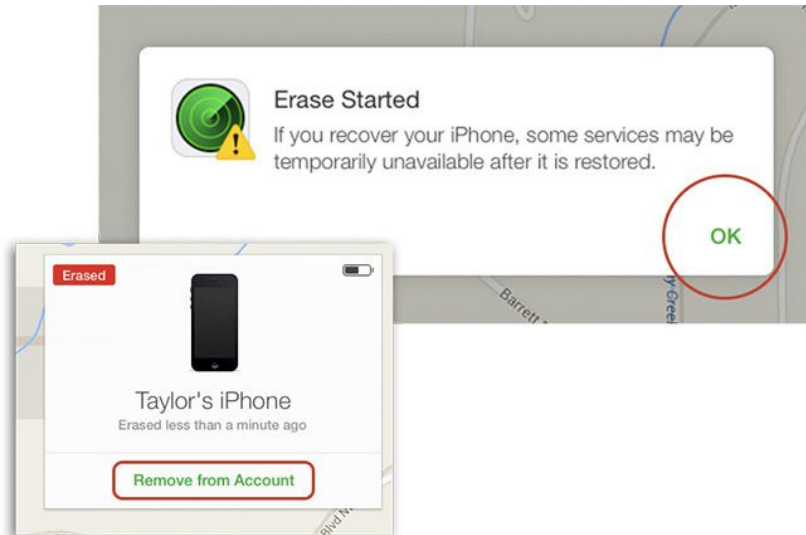
3. A dialogue box will appear for that device. Click **Erase Phone**.



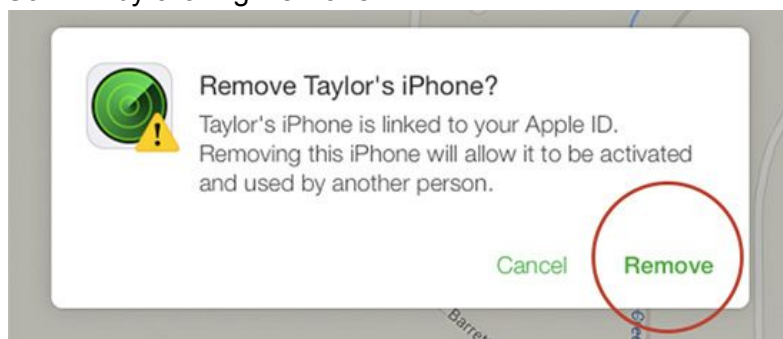
4. Click **Erase** (do not enter a phone number or message) and confirm by clicking **OK**.



5. Then click **Remove From Account**.



6. Confirm by clicking **Remove**.

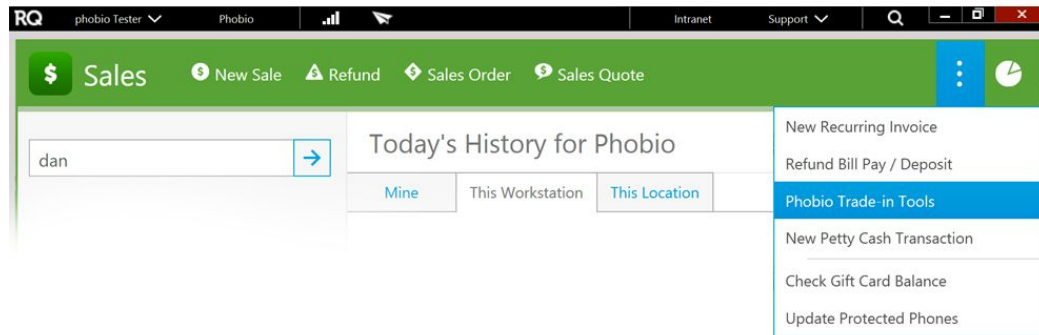


7. Done!

RQ User Access to Phobio Web Tools

To access Phobio Web Tools for RQ users:

Click on **Phobio Trade-in Tools** under the **utility** menu at the top right in the Sales application to access your account in **Phobio.com** to create or track shipments, order more supplies, access reporting tools, etc.

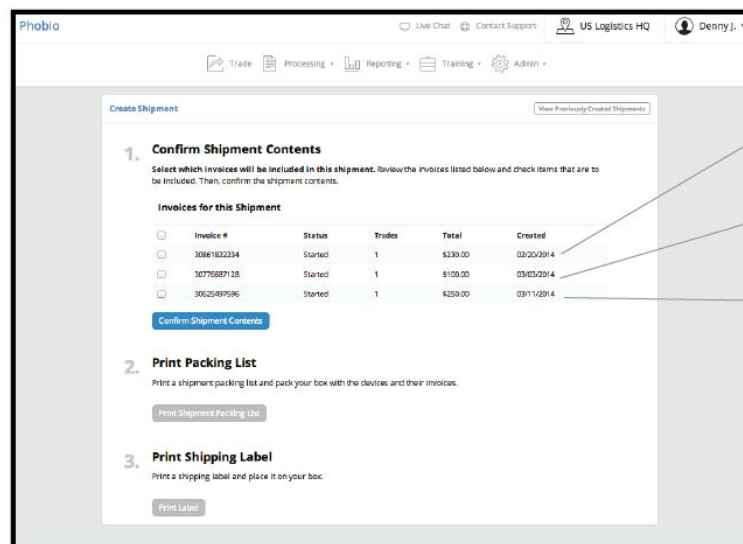


NOTE: For companies using Phobio Integration with RQ4, you can look up trade-in prices through Phobio.com, but the ability to perform trade-ins is deactivated. You can **only** be perform trade-ins through RQ4 and the trade-in products list is “read-only” in Phobio.com.

Creating Shipments to Phobio

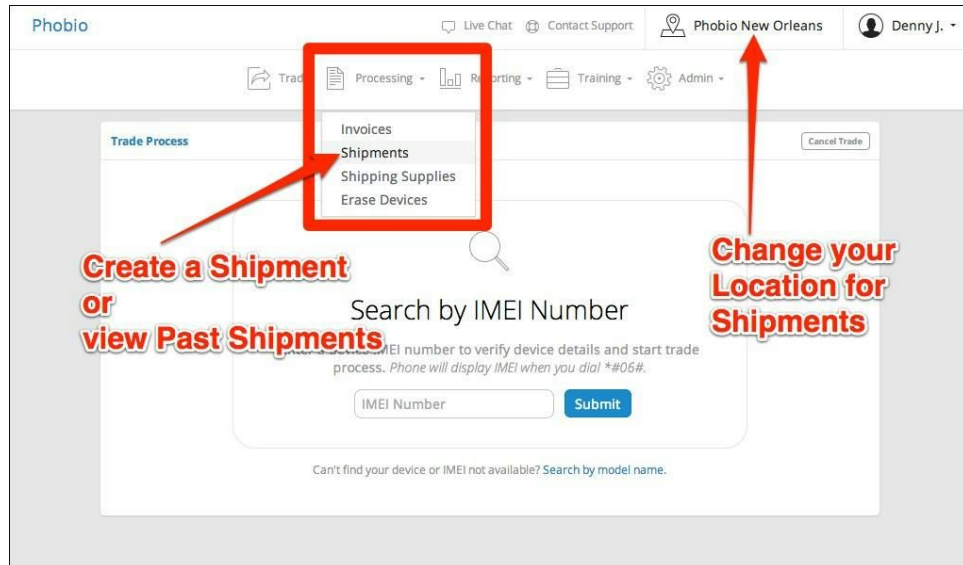
All Trade-Ins created at a LOCATION are assigned to that LOCATION regardless of the person who created the trade-in and what their default or typical location may be. So if a Sales Rep works at 2 different locations, their trades will be assigned to whichever location they were logged into when they created the trade.

The MANAGER or assigned user at that LOCATION collects all the devices from the Sales Reps and stores them safely for regular shipment to Phobio. When creating a SHIPMENT, all the unshipped TRADES created at that LOCATION will be shown in the list of “shippable” TRADES.



Once you have a box full of devices, it's time to ship them to Phobio. With each collected trade-in device should be its Packing List printout attached, so our inspectors can identify each gadget with its specific trade-in transaction.

1. Log into Phobio and click on **Shipments**



2. You will see a list of all unshipped trade-in Invoices that have been processed at your location.

Review the list and de-select any trade-ins which will **not** be included in this shipment. Once you've confirmed the Invoice Contents of your shipment, it's printer time again!

The screenshot shows the 'Create Shipment' page. At the top, there's a 'Create Shipment' button and a 'View Previously Created Shipments' link. The main section is titled '1. Confirm Shipment Contents' and includes instructions: 'Select which invoices will be included in this shipment. Review the invoices listed below and check items that are to be included. Then, confirm the shipment contents.' Below this is a table titled 'Invoices for this Shipment' with columns: 'Invoice #', 'Status', 'Trades', 'Total', and 'Created'. The table contains five rows of data. A red arrow points from the 'Invoice #' column header to a text overlay that says '1) Select the trades in this shipment'. Below the table is a 'Confirm Shipment Contents' button, which is highlighted with a red arrow pointing to a text overlay that says '2) then Confirm'. Below the confirmation step, there are two more steps: '2. Print Packing List' with a 'Print Shipment Packing List' button, and '3. Print Shipping Label' with a 'Print Label' button.

Invoice #	Status	Trades	Total	Created
729733284	Started	2	\$444.00	02/26/2014
<input checked="" type="checkbox"/> 30568696394	Started	1	\$53.00	03/11/2014
<input checked="" type="checkbox"/> 30254135392	Started	1	\$260.00	03/11/2014
<input checked="" type="checkbox"/> 30804272349	Started	1	\$15.00	03/11/2014
<input type="checkbox"/> 30409120661	Started	1	\$102.00	03/11/2014

3. Print the SHIPMENT PACKING LIST.

4. Print the PRE-PAID SHIPPING LABEL.

Create Shipment [View Previously Created Shipments](#)

1. Confirm Shipment Contents
Select which invoices will be included in this shipment. Review the invoices listed below and check items that are to be included. Then, confirm the shipment contents.

Invoices for this Shipment **Unshipped trades not in your shipment will be displayed here.**

<input type="checkbox"/>	Invoice #	Status	Trades	Total	Created
<input type="checkbox"/>	30729733284	Started	2	\$444.00	02/26/2014
<input type="checkbox"/>	30409120661	Started	1	\$102.00	03/11/2014

[Confirm Shipment Contents](#)

2. Print Packing List
Print a shipment packing list and pack your box with the devices and invoices.

[Print Shipment Packing List](#)

3. Print Shipping Label
Print a shipping label and place it on your box.

[Print Label](#)

Print the Packing List to include in the shipment

Print the pre-paid Shipping Label

5. Pack your box with all the devices and invoices and include the Packing List printout.

If you need additional padding in the box, include wads of scrap paper.

Do NOT use packing peanuts or shredded paper as they create dust, which can damage devices.



6. Affix the SHIPPING LABEL to the box. Phobio pays for the shipping costs.

7. Depending on the courier service selected for your location and pickup arrangements, have the package ready for the regular Pickup Day and Time arranged.

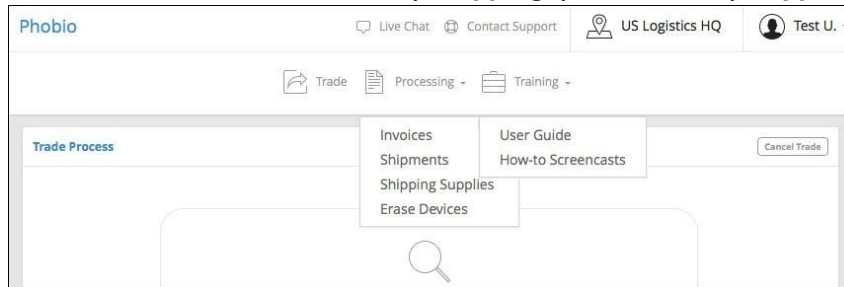
You can access information on past shipments, **reprint documents**, and **view tracking information** by clicking on the **Past Shipments** button at the top right. Then just click on the Shipment Number you wish to track or for which you need to reprint documents.



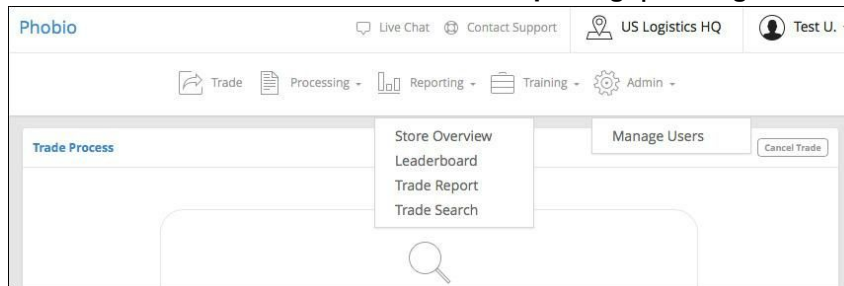
User Permissions/Access

Users created through Phobio have a variety of different permissions settings to give them access to different levels of reporting or features.

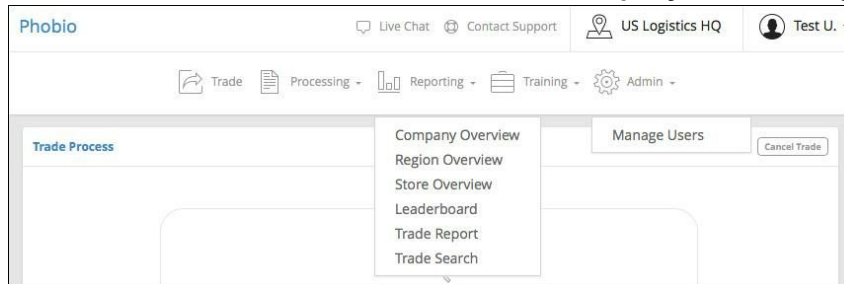
The **DEFAULT USER** can access: **trades | shipping | data erase | support and training resources**



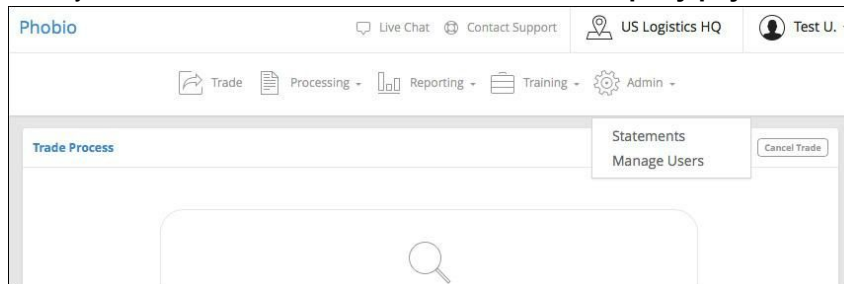
STORE MANAGERS can also access: **store-level reporting | manage users in their location**



COMPANY/REGIONAL MANAGERS can also access: **company-level and regional reports**



And specifically, **FINANCE ACCESS** users can access: **company payment statements from Phobio**



User Tools

Other tools available to Sales Rep users through Phobio.com include:

CHANGE PASSWORD

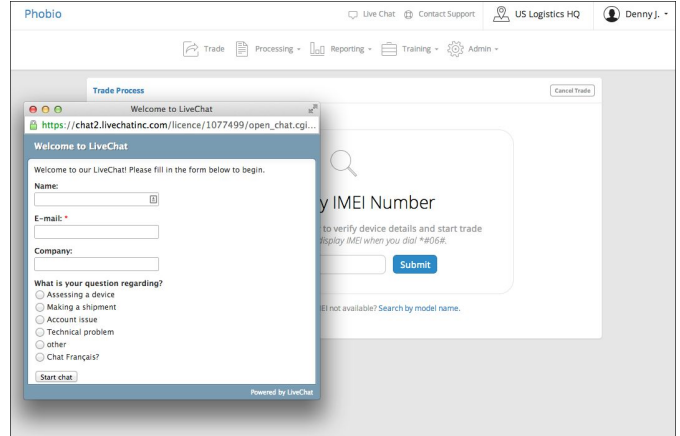
You may change your password for Phobio access.

ORDER SUPPLIES

Launches a form to order shipping supplies for your location.

SUPPORT

Launch Live Chat for immediate needs (questions about assessing a device or simple process questions) or initiate a Support Ticket for issues that are less time-sensitive (investigating trade-in status, account change requests, requests for additions to the product list, etc.).

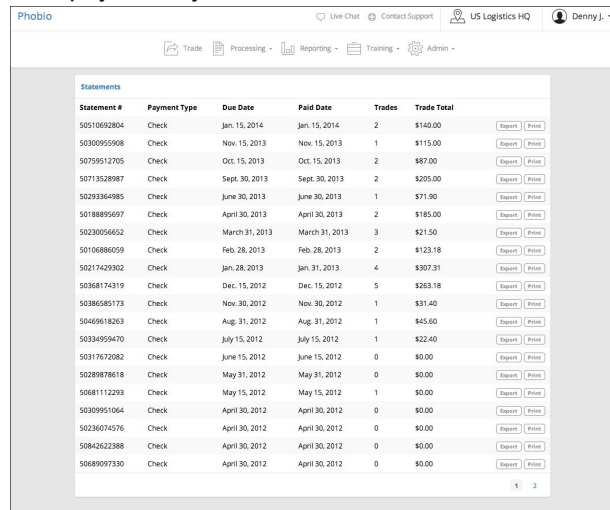


Manager Tools

Phobio allows users who are designated as Managers of a Company, Region or Location to access to a variety of tools to access information about trade activity, sales rep performance, and payments.

ADMIN / STATEMENTS

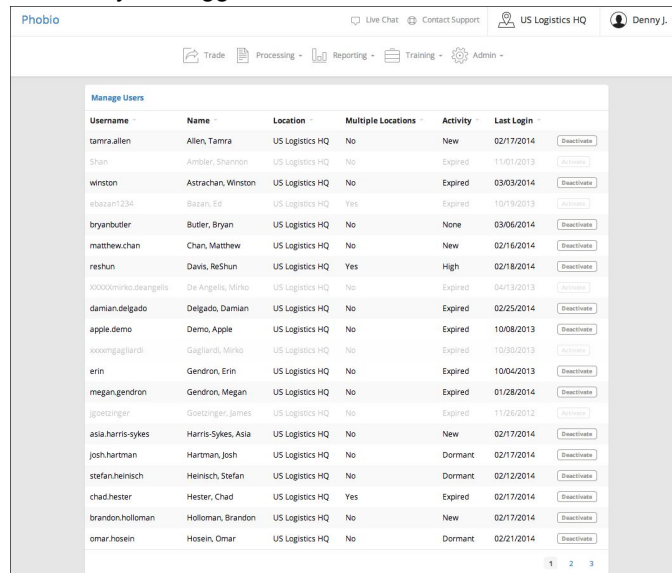
Managers assigned FINANCE ACCESS can view detailed payment records from Phobio by date each payment by Phobio via ACH includes the Statement number.



Statement #	Payment Type	Due Date	Paid Date	Trades	Trade Total	Export	Print
50510692804	Check	Jan. 15, 2014	Jan. 15, 2014	2	\$140.00	Export	Print
5030095908	Check	Nov. 15, 2013	Nov. 15, 2013	1	\$115.00	Export	Print
50759512705	Check	Oct. 15, 2013	Oct. 15, 2013	2	\$87.00	Export	Print
50713529887	Check	Sept. 30, 2013	Sept. 30, 2013	2	\$205.00	Export	Print
50293364885	Check	June 30, 2013	June 30, 2013	1	\$71.90	Export	Print
50188895697	Check	April 30, 2013	April 30, 2013	2	\$185.00	Export	Print
50230056652	Check	March 31, 2013	March 31, 2013	3	\$21.50	Export	Print
50106866059	Check	Feb. 28, 2013	Feb. 28, 2013	2	\$123.18	Export	Print
50217429302	Check	Jan. 28, 2013	Jan. 31, 2013	4	\$307.31	Export	Print
50368174319	Check	Dec. 15, 2012	Dec. 15, 2012	5	\$263.18	Export	Print
50386585173	Check	Nov. 30, 2012	Nov. 30, 2012	1	\$31.40	Export	Print
50469618263	Check	Aug. 31, 2012	Aug. 31, 2012	1	\$45.60	Export	Print
50334959470	Check	July 15, 2012	July 15, 2012	1	\$22.40	Export	Print
50317672082	Check	June 15, 2012	June 15, 2012	0	\$0.00	Export	Print
50289878618	Check	May 31, 2012	May 31, 2012	0	\$0.00	Export	Print
50681112293	Check	May 15, 2012	May 15, 2012	1	\$0.00	Export	Print
5030951064	Check	April 30, 2012	April 30, 2012	0	\$0.00	Export	Print
50236074576	Check	April 30, 2012	April 30, 2012	0	\$0.00	Export	Print
50842622388	Check	April 30, 2012	April 30, 2012	0	\$0.00	Export	Print
50689097330	Check	April 30, 2012	April 30, 2012	0	\$0.00	Export	Print

ADMIN / MANAGE USERS

Managers assigned this ACCESS can deactivate Phobio accounts for users at the LOCATION in which they are logged-in.



Username	Name	Location	Multiple Locations	Activity	Last Login	Deactivate
tamra.allen	Allen, Tamra	US Logistics HQ	No	New	02/17/2014	Deactivate
Shan	Ambler, Shannon	US Logistics HQ	No	Expired	11/01/2013	Deactivate
winston	Astrachan, Winston	US Logistics HQ	No	Expired	03/03/2014	Deactivate
ebacarr1234	Bacarr, Ed	US Logistics HQ	Yes	Expired	10/19/2013	Deactivate
bryanbutler	Butler, Bryan	US Logistics HQ	No	None	03/06/2014	Deactivate
matthew.chan	Chan, Matthew	US Logistics HQ	No	New	02/16/2014	Deactivate
reshun	Davis, Reshun	US Logistics HQ	Yes	High	02/18/2014	Deactivate
XXXXXmirkos.deangelis	De Angelis, Mirko	US Logistics HQ	No	Expired	04/13/2013	Deactivate
damian.delgado	Delgado, Damian	US Logistics HQ	No	Expired	02/25/2014	Deactivate
apple.demo	Demo, Apple	US Logistics HQ	No	Expired	10/08/2013	Deactivate
XXXXXgagliardi	Gagliardi, Mirko	US Logistics HQ	No	Expired	10/30/2013	Deactivate
erin	Gendron, Erin	US Logistics HQ	No	Expired	10/04/2013	Deactivate
megan.gendron	Gendron, Megan	US Logistics HQ	No	Expired	01/28/2014	Deactivate
jgoetzinger	Goetzinger, James	US Logistics HQ	No	Expired	11/26/2012	Deactivate
asia.harris-sykes	Harris-Sykes, Asia	US Logistics HQ	No	New	02/17/2014	Deactivate
josh.hartman	Hartman, Josh	US Logistics HQ	No	Dormant	02/17/2014	Deactivate
stefan.heinisch	Heinisch, Stefan	US Logistics HQ	No	Dormant	02/12/2014	Deactivate
chad.hester	Hester, Chad	US Logistics HQ	Yes	Expired	02/17/2014	Deactivate
brandon.holloman	Holloman, Brandon	US Logistics HQ	No	New	02/17/2014	Deactivate
omar.hosein	Hosein, Omar	US Logistics HQ	No	Dormant	02/21/2014	Deactivate

REPORTING

Each of the Reporting Tools are explained in more detail below...

Reporting

Phobio gives you and your company all the support, tools and access you need to ensure the trade-in program is an effective and profitable closing tool for sales.

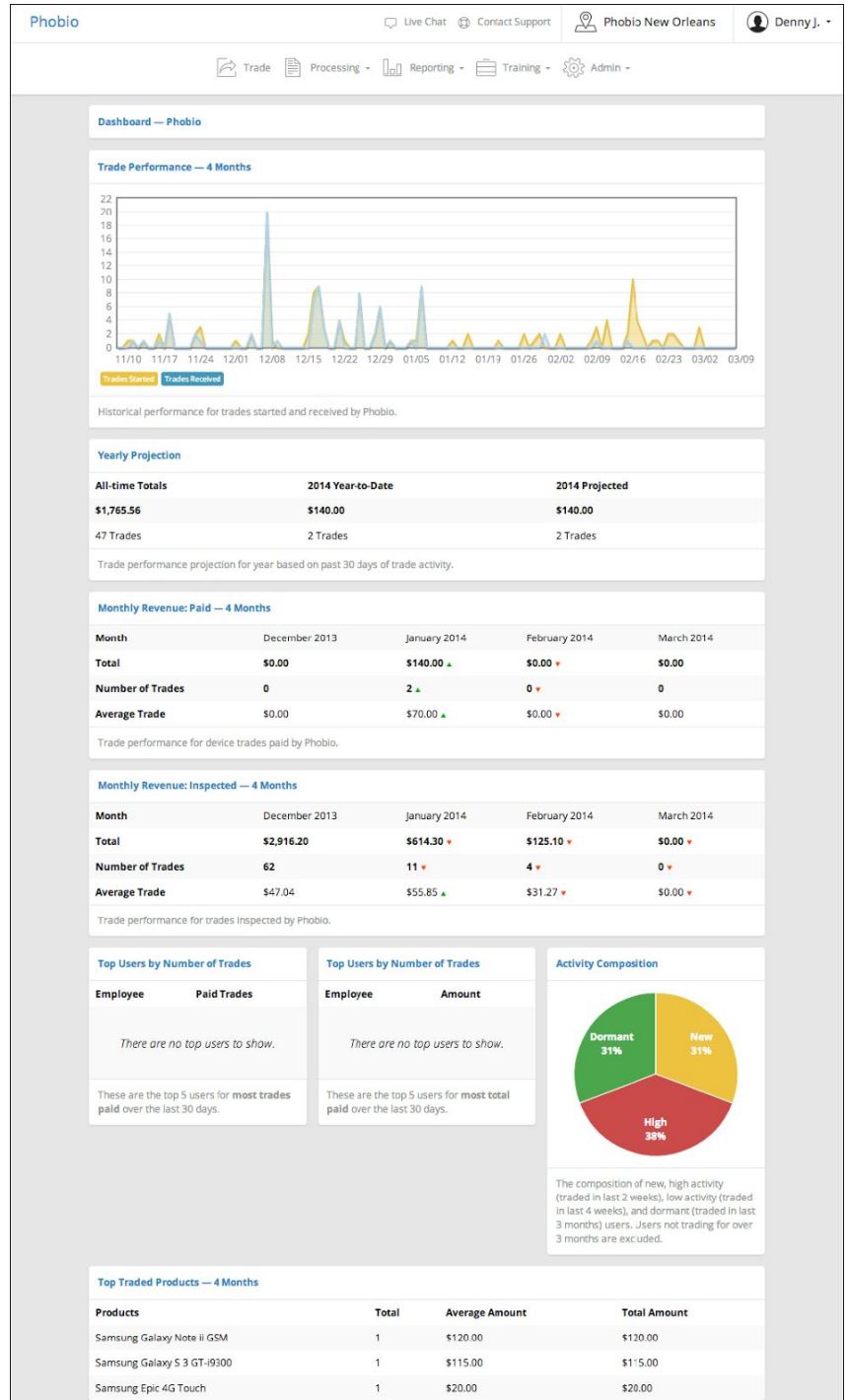
Here are some of the Reporting Tools available to Managers...

COMPANY AND STORE OVERVIEWS

The reporting tool with the most strategic high-level information would be the Overviews, which are dashboards of data on recent transaction trends in your company.

The **Company Overview** shows company-wide data across all stores, and the **Store Overviews** display the data at the store-location level. The overviews show you information such as:

- monthly total amount of value given to your customers
- average trade-in value
- average days to ship and adjustment rate
- top-performing Sales Reps
- top traded-in devices
- “activity composition” showing the percentage of your users by their level of trade-in activity



LEADERBOARD

The leader board is a great way to see details all the way down to the individual users performance. View the trade-in statistics on any and all Phobio Users at your company and **sort** by date-range, location, or any performance metrics. This is a way to identify users at different locations who may have many late shipments, high adjustment rates, etc. and require some additional training.

Complete report results may be exported to a CSV file (which you can then manage via Excel) by clicking on the **Export CSV** button at the top right.

Leaderboard Export CSV

Filter by Date Range

Date Range Created Date

From Date January 1 2014

To Date April 1 2014

Filter

Filter by Store Location

Location Filter All Locations

Location Phobio New Orleans

User	Location	Trades	Received	Adjusted	Days-to-ship	Product Errors	Condition Errors	Trade Total
Tomlinson, Brice	US Logistics HQ	18	100.0%	-11.8%	-	0.0%	16.7%	\$843.60
Norman, Adam	US Logistics HQ	15	100.0%	-12.0%	1	0.0%	20.0%	\$668.10
Davis, ReShun	US Logistics HQ	13	0.0%	0.0%	-	0.0%	0.0%	\$1,815.00
Rivera, Josh	US Logistics HQ	10	100.0%	-10.4%	-	0.0%	10.0%	\$602.30
Hosein, Omar	US Logistics HQ	6	100.0%	0.0%	-	0.0%	0.0%	\$49.30
Wakeling, Matt	US Logistics HQ	5	0.0%	0.0%	-	0.0%	0.0%	\$55.00
Majid, Zeeshan	US Logistics HQ	3	0.0%	0.0%	-	0.0%	0.0%	\$473.00
Krebs, Brandon	US Logistics HQ	3	0.0%	0.0%	-	0.0%	0.0%	\$212.00
Juge, Denny	Phobio New Orleans	2	0.0%	0.0%	-	0.0%	0.0%	\$444.00
Yeaton, Andrew	US Logistics HQ	2	0.0%	46.3%	-	0.0%	0.0%	\$300.00
Delgado, Damian	US Logistics HQ	1	0.0%	0.0%	-	0.0%	0.0%	\$250.00
Klugman, Taylor	US Logistics HQ	1	0.0%	0.0%	-	0.0%	0.0%	\$230.00

TRADE REPORT

Trade Report allows the most granular access to all your company's trade-In activity through Phobio. Through filtered searches, you may pull specific information on all trade-Ins for analysis or investigation.

These reports highlight any upward or downward adjustments and when you rollover the highlighted parameter, it will display the adjustment source. For instance, if there is an adjustment to a trade-in and the Model field is highlighted yellow, then the adjustment was due to the device being incorrectly identified by the Sales Rep. When you roll over that field, you will see the original Model the Sales Rep entered for that trade-in. As you will see, adjustments go both ways, and Phobio will pay your company for upgrade adjustments as well.

Trade Reports are organized into Templates allowing you to quickly pull reports on things like Created Trades, Inspected, Received, Deleted, Adjusted, etc. These reports can show you results for either the past week, month, or year.

The screenshot displays the Phobio web application interface. At the top, there is a navigation bar with the Phobio logo, a Live Chat button, a Contact Support button, and a user profile for Denny J. Below the navigation bar is a menu with icons for Trade, Processing, Reporting, Training, and Admin. The main content area is titled "Trade Report" and lists several report templates, each with a description and a list of time period options:

- Created Trades**: Trades that have been created during one of the following time periods.
 - Year-to-Date Created Trades
 - Month-to-Date Created Trades
 - Week-to-Date Created Trades
- Inspected Trades**: Trades that have been inspected during one of the following time periods.
 - Year-to-Date Inspected Trades
 - Month-to-Date Inspected Trades
 - Week-to-Date Inspected Trades
- Received Trades**: Trades that have been received during one of the following time periods.
 - Year-to-Date Received Trades
 - Month-to-Date Received Trades
 - Week-to-Date Received Trades
- Adjusted Trades**: Trades that have been adjusted during one of the following time periods.
 - Year-to-Date Adjusted Trades
 - Month-to-Date Adjusted Trades
 - Week-to-Date Adjusted Trades
- Deleted Trades**: Trades that have been deleted during one of the following time periods.
 - Year-to-Date Deleted Trades
 - Month-to-Date Deleted Trades
 - Week-to-Date Deleted Trades
- Undocumented Trades**: Undocumented Trades created during one of the following time periods.
 - Year-to-Date Undocumented Trades
 - Month-to-Date Undocumented Trades
 - Week-to-Date Undocumented Trades
- Unshipped Trades**: Trades that have been created but not received by Phobio in the last 180 days.
 - Unshipped Trades
- Manual Filtering**: Select this option to view all available trade report filters.
 - Manually Filtered Trades

Two red callout boxes are present: one pointing to the "Created Trades" section with the text "Select a Trade Report from the template list..." and another pointing to the "Manual Filtering" section with the text "...or create your own." and a red arrow.

Just select a report to view...

Phobio

Live Chat Contact Support Phobio New Orleans Denny J.

Trade Processing Reporting Training Admin

Trade Report Year-to-Date Created Trades Submit Show Filter Options

Year-to-Date Created Trades — Summary

45 Total Trades \$100.41 Average Payment - Avg. Days-to-Ship \$25.30 Total Adjusted

Working 33 73.3%
Damaged 10 22.2%
Dead 2 4.4%

Trades that have been created since the beginning of this year

Year-to-Date Created Trades — Trade Results CSV Export

Trade #	Model	Status	Location	Started	Received	Paid	Condition	Payment
20646752772	Apple iPhone 3Gs 32GB	Inspected	US Logistics HQ	01/02/2014	01/02/2014	-	Working	\$12.00
20753364361	Apple iPhone 3Gs 8GB	Inspected	US Logistics HQ	01/06/2014	01/06/2014	-	Damaged	\$4.00
20346244385	Apple iPad 2 16GB WiFi	Quoted	US Logistics HQ	01/06/2014	-	-	Damaged	\$53.00
20580164000	Apple iPhone 4S 16GB CDMA	Inspected	US Logistics HQ	01/08/2014	01/08/2014	-	Working	\$93.00
20815784846	Samsung Galaxy S 3 Verizon	Inspected	US Logistics HQ	01/08/2014	01/08/2014	-	Damaged	\$48.00
20589957727	Apple iPhone 4S 16GB CDMA	Inspected	US Logistics HQ	01/08/2014	01/08/2014	-	Damaged	\$47.00
20288458027	Apple iPhone 4S 16GB CDMA	Inspected	US Logistics HQ	01/08/2014	01/08/2014	-	Damaged	\$47.00
20561478007	Apple iPhone 4S 16GB CDMA	Inspected	US Logistics HQ	01/08/2014	01/08/2014	-	Working	\$93.00
20222142364	Apple iPhone 4S 16GB CDMA	Inspected	US Logistics HQ	01/08/2014	01/08/2014	-	Damaged	\$47.00
20304404625	Apple iPhone 4S 16GB CDMA	Inspected	US Logistics HQ	01/08/2014	01/08/2014	-	Dead	\$23.30
20724540115	Apple iPhone 4S 16GB GSM	Inspected	US Logistics HQ	01/08/2014	01/08/2014	-	Working	\$100.00

Customize this report

Export full report to CSV

You can start with any report and modify the parameters to get results as specific as you need.

Phobio

Live Chat Contact Support Phobio New Orleans Denny J.

Trade Processing Reporting Training Admin

Trade Report Year-to-Date Created Trades Submit Hide Filter Options

Filter by Date Range

Date Range Created Date

From Date January 1 2014

To Date March 10 2014

Filter by Store Location

Location Filter All Locations

Region

Locations

☐ Phobio New Orleans

☐ US Logistics HQ

Filter by Salesperson

Trade Status Active Trades

Trade Status

☒ Quoted

☒ Not Received

☒ Returned

☒ Received

☒ Inspected

Username

List usernames separated by comma.

Client Reference

List client reference IDs separated by comma.

Invoices

List invoice UUIDs separated by comma.

Trades

List trade UUIDs separated by comma.

Additional Details

☐ Only show Adjusted Trades

☐ Only show Undocumented Trades

Filter

Year-to-Date Created Trades — Summary

45 Total Trades \$100.41 Average Payment - Avg. Days-to-Ship \$25.30 Total Adjusted

Working 33 73.3%
Damaged 10 22.2%
Dead 2 4.4%

Trades that have been created since the beginning of this year.

Year-to-Date Created Trades — Trade Results CSV Export

To customize a Trade Report, alter the parameters and click "filter" to view results.

Trade Report search results are a combination of all the filtering parameters that are set. Below is a list of these parameters and what they mean:

Filter by Date Range

Created	Date a Trade-In was created
Processed	Date a Trade-In was received at Phobio Receiving Facility
Paid	Date a Trade-In was paid-out by Phobio

Filter by Status/Salesperson

Active and/or Deleted	Drop-down field
Quoted	an invoice was created in Phobio
Received	an invoice was created / Trade-In was received at Phobio
Not Received	an invoice was created / Trade-In was not received at Phobio
Returned	an invoice was created / Trade-In was returned (RARE)
Inspected	an invoice was created / Trade-In was received and inspected
Username	search by Phobio username for login
Client Reference	search by optional Sales Representative Code
Invoice(s)	search by specific Invoice number (11-digit number starting with "30") search multiples by separating each number with a comma
Trade(s)	search by specific Trade number (11-digit number starting with "20") search multiples by separating each number with a comma
Only show Adjusted Trades	checkbox option

Filter by Store Location

By default, data searches will search through all your company locations.
You may narrow your search to specific Regions or a selection of Locations.

Complete report results may be exported to a CSV file (which you can then manage via Excel) by clicking on the **Export CSV** button at the top right. The exported CSV file will contain ALL the trade-in data on these trades including:

- trade and received dates
- model and condition information (both quoted and inspected)
- customer quote amount (amount of credit given to customer)
- payment amount (amount paid to company)
- customer information entered by Sales Rep
- IMEI/ESN entered by Sales Rep
- Sales Rep and location of trade

More information on the exported Trade Reports follows in the section addressing **Trade-In Payments and Reconciliation**.

TRADE SEARCH

Search the database of your trades by trade number, IMEI, tracking number, etc. to get details on that transaction.

Phobio

Live Chat Contact Support Phobio New Orleans Denny J.

Trade Processing Reporting Training Admin

Trade Search Trade UID, Invoice UID, etc. **Search** Export CSV

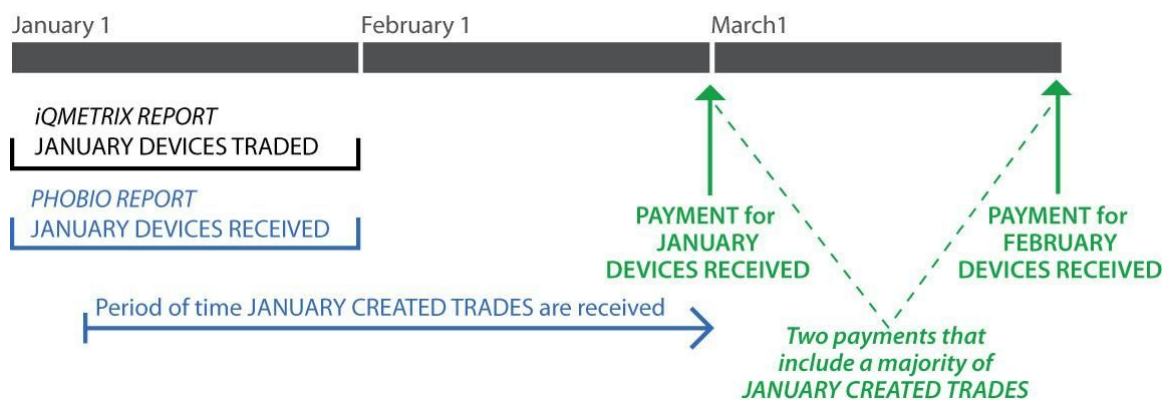
Trade #	Model	IMEI	Invoice	Shipment	Tracking #	Status	Location
There were no results for your search. Search by trade number, model name, imei number, invoice number, shipment number, or tracking number.							

Enter a Trade or Invoice Number, IMEI, etc. to view the detailed information on that trade.

Payments and Reconciliation

For customers on a monthly payment schedule, Phobio pays at the end of the month for all devices *received* in the previous month. For example, the payment on July 31 is for all devices received in June.

Though we recommend and help facilitate weekly shipping of trade-ins, there is an average 10-day lag-time from trade-in to inspection. Thus, a trade made at the end of June might not be received at Phobio until early July, and would be paid out in the August statement. Keep in mind that Phobio has a 21-day price guarantee and any trades that are received outside of that 21-day period are subject to a price change to the current market value.



The following procedure is the method we recommend for comparing and reconciling trade-in payments.

Exporting RQ and Phobio Reports into Excel

In order to reconcile trade-in payments, you need to pull trade reports from RQ4 and Phobio Reports for comparison.

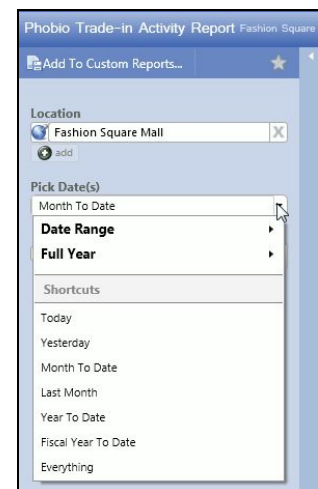
To access the **Phobio Trade-in Activity Report in RQ4** go to:
Reports Console → Integrated Services → Phobio Trade-in Activity Report.

Select Location

The report will default to the location you are logged into, but any level of the company tree can be selected (Company, Region, District, or Location). Use the **add** button to add multiple employees, locations, districts, or regions.

Pick Date Range

Select any of the date options in the drop down list



Once you have set your report criteria, use the **Excel** button to open this report in Excel.

Sale Invoice # - invoice number assigned by RQ4
Trade In Invoice # - invoice number assigned by Phobio
Trade-In Status - the status of the trade-in
Item Code - unique code assigned to the product
Manufacturer Model - name of the product that was returned
Serial # - serial number of the product being traded in
Store Name - name of the store where the trade in activity occurred
Trade In Date - date of the product was traded in
Cancel Date - the date of the cancellation
Phone Rebate Amount - amount of the rebate for this particular product

Remember: The Customer Trade In Value is always a percentage less than the value paid to your company as there is a "holdback" to help cover any adjustments.

When you export the CSV of the Trade Report you'll see the following columns:

statement_num	Phobio payment statement number (11-digit number starting with "50")
shipment_num	Phobio shipment number (11-digit number starting with "40")
shipment_tracking_number	Tracking number (FedEx, UPS, etc.)
invoice_num	Phobio Invoice Number unique to every trade in transaction (11-digit number starting with "30")
trade_num	Phobio Trade-In number unique to every device (11-digit number starting with "20")
model	device model
imei	IMEI or ESN of device if entered
reported_condition	(Working, Damaged or Dead) as reported by sales rep
quoted_amount_cents	Total payment value of device as reported by sales rep (full Phobio value with no holdback % removed)
adjusted_condition	(Working, Damaged or Dead) as reported by Phobio inspectors
payment_amount_cents	Total payment to your company for this trade-in (full Phobio value with no holdback % removed)
client_reference	sales rep's info
created	Date trade-in created in UTC
received	Date device received by Phobio in UTC
paid	Date Phobio paid your company for this trade-in in UTC
quoted_customer_amount_cents	Amount of Customer Trade-In Value given by sales rep (with holdback % removed)
payment_customer_amount_cents	Amount of Customer Trade-In Value after Inspection (with holdback % removed)
first_name	Sales rep's first name
last_name	Sales rep's last name
company_location	Store location of trade-in
customer_first_name	Customer's name (if entered)
customer_last_name	Customer's name (if entered)
customer_id_num	Customer's ID # (if entered)
customer_id_type	Customer's ID type (if entered)
local_created	Date trade-in created for Location's timezone
local_received	Date trade-in received for Location's timezone
local_paid	Date trade-in paid for Location's timezone
is_active	"0" if this trade-in was deleted and "1" if it is an existing trade-in

Reconciling Paid Trades by Month Created

To allow for trades created at the end of a month to be shipped, received, and paid, it is best to do this *2 months after* the month you are reconciling. For example, August is when you reconcile trades created in June.

- 1 Export **RQ4 Report** on all trades created in a target month
- 2 In Phobio Trade Report, select the data range of the target month for “Created date” and click the Filter button to display results.
- 3 Click the Export CSV button at the top right and open the report in Excel.

If the number of transaction rows in both spreadsheets match:

- a Sort Phobio Trade Report by the **paid column** to identify any trades created which have not been paid
- b Investigate any trades that have not been paid as they have not been received or inspected by Phobio
- c Identify any adjustments (difference between the quoted amount and paid amount) to the original trades, go back into Phobio Trade Reports and query the same date range, selecting the **Only Show Adjusted Trades** checkbox.
- d If you export the CSV of this report, you can compare the **quoted_customer_amount_cents** (amount of store credit given to the customer) and **paid_amount_cents** (amount paid out to your company)

If there are more transaction rows in the RQ4 Report than the Phobio Trade Report or more transaction rows in the Phobio Trade Report than the RQ4 Report:

- a Sort the RQ4 Report by **Trade In Date**
- b Sort the Phobio Trade Report by the **created column**
- c Now go through each row to identify which are the *anomalous trades* (the trade-in numbers are unique identifiers in both spreadsheets)
- d Communicate the trade-in numbers of anomalous trades to support@phobio.com for investigation.

Problems? Questions? Great ideas?

Email support@phobio.com and/or accounts@phobio.com

Email Alerts, Reminders and Reports

There are two main automated email alerts Phobio sends out:

Adjustment Alerts	(the quoted Device Model or Condition is changed by an Inspector)
Shipment Reminders	(2 weeks after trade-in if created invoices have not been shipped or received yet)

These emails all come from **support@phobio.com**, which is our Support Ticket System so any REPLY to the email will create a Support Ticket and our Support Agents will address any questions/concerns at that point.

ADJUSTMENT ALERTS

When the inspector inspects a phone, 3 types of adjustments may occur:

- error in model
- error in condition
- or it has been received beyond the 21-day price guarantee

For Model & Condition corrections, the inspector will take documenting photos and notes on the change. Once they do this an email is generated with the details of the adjustment and attached photos.

For late trades, the email is automatically generated upon completion of the inspection.

SHIPMENT REMINDERS

These are automated and sent out regarding trade-ins that have not been shipped or received after 2 weeks from the date of trade-in.

ALERT EMAIL RECIPIENTS

Different sets of target recipients can be assigned for each of these alert types for your company:

- the Sales Rep who created the trade-in AND/OR
- the email address assigned to that trade-in's store location (i.e. store manager) AND/OR
- any set of email addresses a company specifically wants (loss prevention staff, etc.)

Custom Automated Email Reports

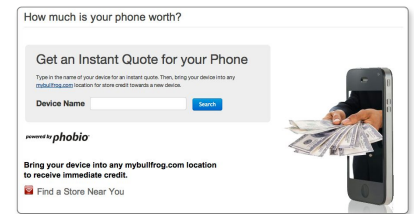
Even better than having all the data right at your fingertips is having the right information **sent to you** at the right time. Custom email reports on any aspect of your trade-in performance can be created and scheduled for monthly, weekly or daily email to any list of emails you require.

Marketing Tools

Phobio's core business is to drive more sales for our retailers, and we provide innovative complementary solutions to increase customer interest. In short, we've got *better mousetraps*.

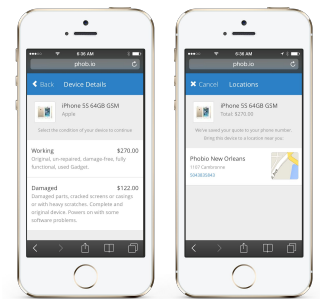
QUICK QUOTE WEB WIDGETS

Add a complete "Trade-In Quick Quote Widget" to your website or mobile application allowing your customers to see the trade-in value of their devices to redeem at your stores. Phobio can create "campaign-specific" pages for targeted devices integrating the trade-in quote functionality to show your customers the final new device price after trade-in and applicable promotions.



CUSTOMER TRADE-IN QUOTES VIA MOBILE

Drive more store activity through a simple mobile experience... The customer texts "**Trade**" to your company's Mobile Quote number, and instantly receives a link to a webpage which automatically detects the model of their device, presents the trade-in value, and shows them your nearest locations to redeem the value for their trade-in.



The simple call-to-action can be advertised to your customers to access this tool which displays your company branding and presents your retail locations.

IN-STORE MARKETING COLLATERAL

Phobio offers a quarterly refresh of printed materials for your stores including:

- Posters
- Table Tents
- Point-of-Purchase incentives

Phobio offers a host of **digital solutions**, from HD digital stills to short animations customized with your logo, brand colors, and messaging.

- RQ AdPlay integrated
- Scalable to all digital display options



Contact your Account Manager or visit <http://mysafe.trade>