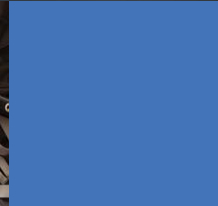


Order Processing



Order Processing

- Order Fulfillment Manager Role & Responsibilities
- Admin Overview
- Order Processing 101
 - Integration Lite - (Export Only)
- How to Renew an Expired Credit Card Authorization
- How to Cancel Orders & Process Returns

Order Fulfillment Manager Role & Responsibilities

Order Fulfillment Manager Role & Responsibilities

A brand's Order Fulfillment Manager (OFM) is the main point of contact for the ExpertVoice Customer Success Partner as well as the Expert Support Team. This can be for anything related to order processing and inventory management. It is important for a brand to process orders in a timely manner and keep inventory numbers up to date. This way Experts have a positive experience with the brand on ExpertVoice and ultimately become brand advocates for them after experiencing their products.

Main Role:

- Receive and fulfill orders in a timely, efficient manner
- Keep inventory levels up to date
- Responsible for processing refunds and cancellations as needed
- Assist with customer service questions either directly from the expert or ExpertVoice's Expert Support team
- Work with the Customer Success Partner to troubleshoot any issues

Best Practices:

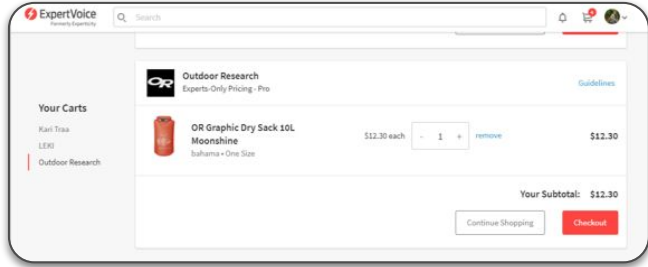
- Monitor orders via the Daily Order Summary email
- How often an OFM should be coming into the ExpertVoice admin to process orders is dependent on order volume. We recommend going in at least a couple times a week, but for high volume brands, orders should be processed on a daily basis. All orders should be processed within 7 days due to the card authorization window
- If inventory availability fluctuates regularly, the OFM should update the inventory file for ExpertVoice on a daily basis. Otherwise, we recommend updating inventory at least once a week



Admin Overview

ExpertVoice Overview

1. Customers place orders on ExpertVoice.com



2. Order fulfillment manager exports new order batches from admin.expertvoice.com

We call this portal the “Admin.” This is where you’ll manage orders, reports, members, etc.

3. Brand processes order

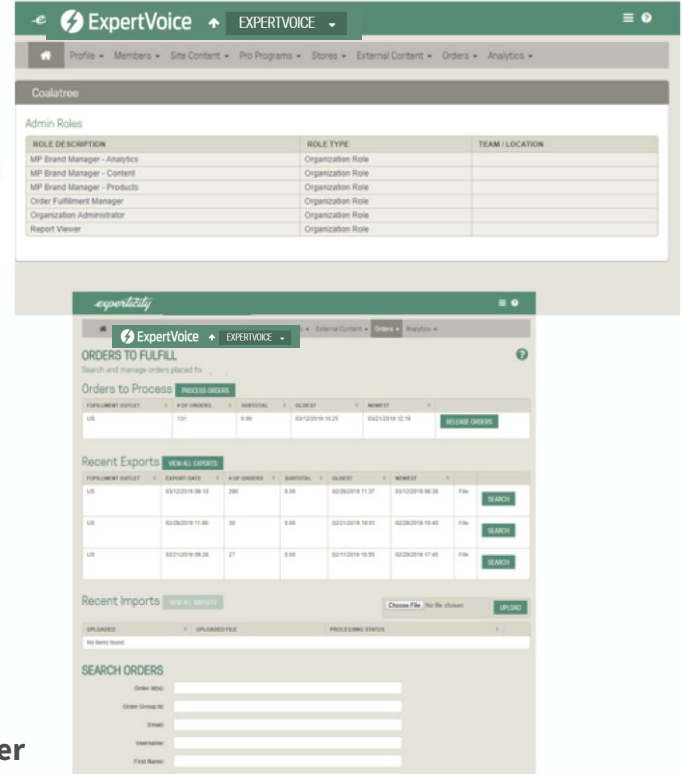


4. Order fulfillment manager captures payment and inputs tracking number in “Admin”

5. Customer leaves awesome review



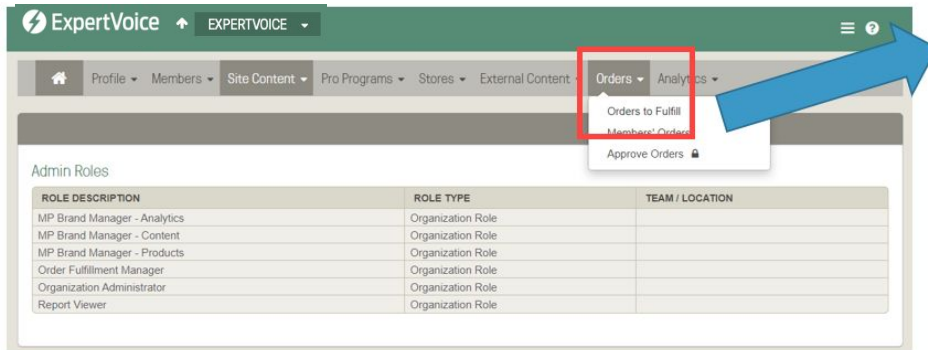
“Admin”
→



Navigating Admin

Admin Home Screen Drop Downs

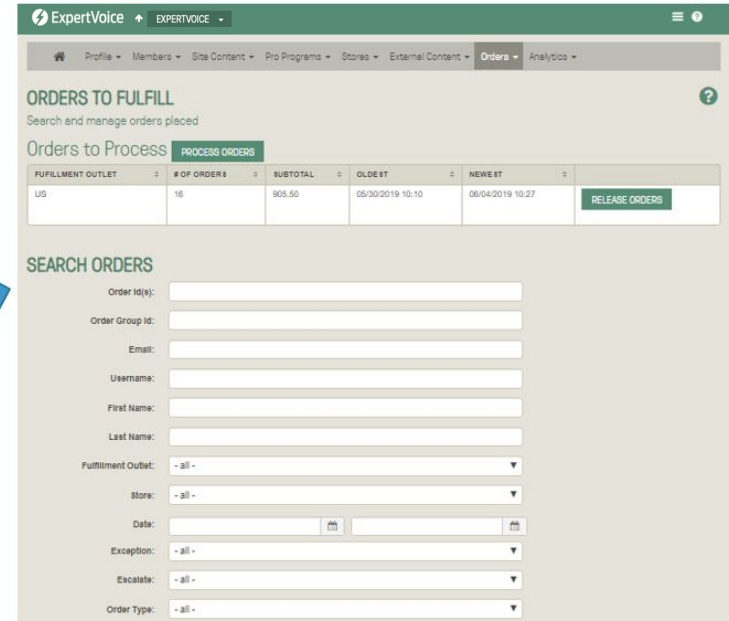
You will spend most of your time in “Orders”



The screenshot shows the ExpertVoice Admin Home Screen. The navigation menu at the top includes Profile, Members, Site Content, Pro Programs, Stores, External Content, Orders, and Analytics. The 'Orders' dropdown menu is highlighted with a red box and a blue arrow pointing to the right. The dropdown menu contains 'Orders to Fulfill', 'Members' Orders', and 'Approve Orders'.

Below the navigation menu is a table titled 'Admin Roles' with the following data:

| ROLE DESCRIPTION | ROLE TYPE | TEAM / LOCATION |
|------------------------------|-------------------|-----------------|
| MP Brand Manager - Analytics | Organization Role | |
| MP Brand Manager - Content | Organization Role | |
| MP Brand Manager - Products | Organization Role | |
| Order Fulfillment Manager | Organization Role | |
| Organization Administrator | Organization Role | |
| Report Viewer | Organization Role | |



The screenshot shows the ExpertVoice 'ORDERS TO FULFILL' screen. The page title is 'ORDERS TO FULFILL' and the subtitle is 'Search and manage orders placed'. Below the title is a 'PROCESS ORDERS' button. The main content area contains a table with the following data:

| FULFILLMENT OUTLET | # OF ORDERS | SUBTOTAL | OLDEST | NEWEST | |
|--------------------|-------------|----------|------------------|------------------|----------------|
| US | 16 | 905.50 | 05/30/2019 10:10 | 06/04/2019 10:27 | RELEASE ORDERS |

Below the table is a 'SEARCH ORDERS' section with the following fields:

- Order Id(s):
- Order Group Id:
- Email:
- Username:
- First Name:
- Last Name:
- Fulfillment Outlet:
- Store:
- Date:
- Exception:
- Escalate:
- Order Type:

Under the “Orders” drop down, select “Orders to Fulfill” to search and manage orders. You can search by:

- Order ID, Member email, order status, etc.
- Leaving all fields blank and clicking submit will show all orders ever placed.



Navigating Admin

Click on an order to view the Order Summary screen



Click **Edit** to change shipping method, add a note, reference number or vendor invoice number



Once orders are released, the card is authorized for 168 hours (7 days), if the order does not ship within this time period, you will need to **Renew Authorization** for the card. More explanation to come.



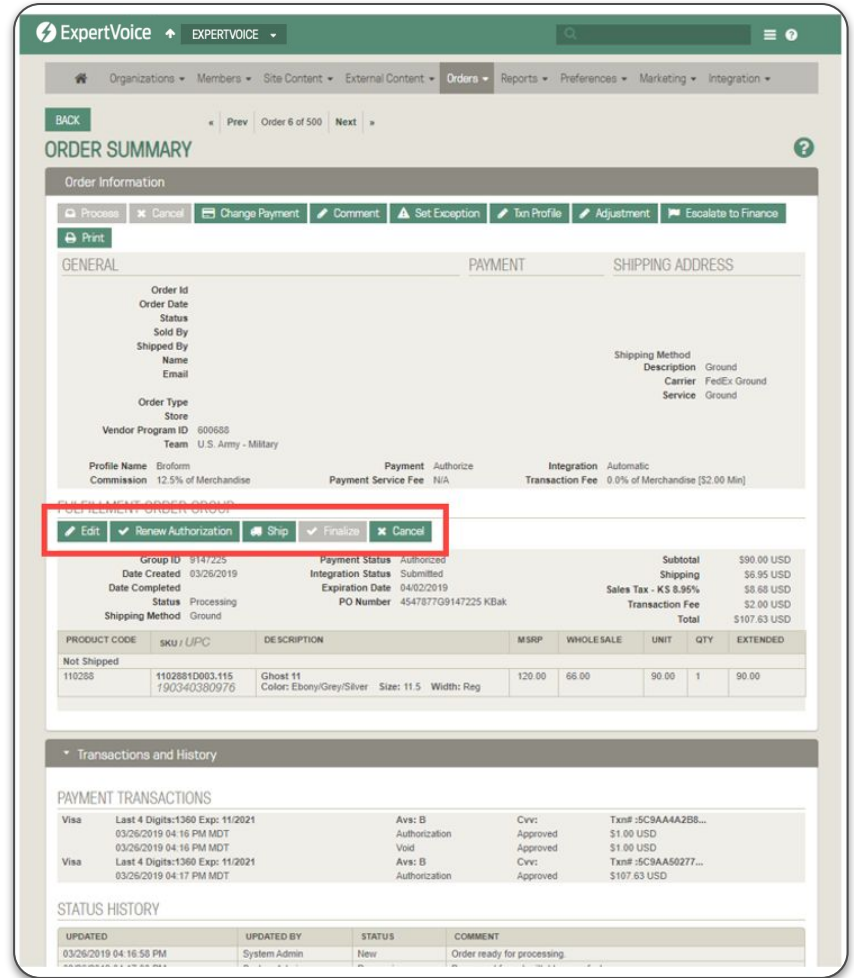
Click **Ship** to manually ship the order, this is where you will input the tracking number if applicable. More explanation to come.



Click **Cancel** to cancel the order or individual items from the order. More explanation to come.



Click **Finalize** to capture payment and complete the order.



Navigating Admin

From the Order Summary screen:



Comment

Click **Comment** to add notes to an order.

- “Make note public” means the member will see the comment you input in their ExpertVoice profile
- “Email member” means the member will receive an email with the comment you input.

Uncheck both and only your employees with admin rights and ExpertVoice employees will see the comment.

NOTE: If a brand wants an Expert to get directly in-touch with them, then an email address/phone number in the order note *must* included.



Escalate to Finance

Ship No Capture means the item shipped and payment was not captured. Remember to finalize the order before shipping!

Partial Refunds Click Escalate to Finance, leave a comment and contact your CS partner for further instructions.



Set Exception

Click **Set Exception** to flag a troubled order. Contact your CS partner with questions and concerns about an order. You can search orders by “Exception” in the order search dropdown.

NOTE: there are manual and automatic exceptions. Admin automatically sets an exception when an error occurs, typically with a credit card issue

ExpertVoice EXPERTVOICE

Organizations Members Site Content External Content Orders Reports Preferences Marketing Integration

BACK < Prev Order 6 of 500 Next >

ORDER SUMMARY

Order Information

Process Cancel Change Payment **Comment** **Set Exception** Tax Profile Adjustment **Escalate to Finance**

Print

| GENERAL | | PAYMENT | | SHIPPING ADDRESS | |
|-------------------|----------------------|---------------------|-----------|------------------|----------------------------------|
| Order Id | 4547877 | Fulfillment Outlet | 100 | Shipping Method | Ground |
| Order Date | 03/26/2019 | Currency | USD | Description | Ground |
| Status | Processing | | | Carrier | FedEx Ground |
| Sold By | Experticity | | | Service | Ground |
| Shipped By | | | | | |
| Name | | | | | |
| Email | | | | | |
| Order Type | | | | | |
| Store | | | | | |
| Vendor Program ID | | | | | |
| Team | U.S. Army - Military | | | | |
| Profile Name | Broform | Payment | Authorize | Integration | Automatic |
| Commission | 12.5% of Merchandise | Payment Service Fee | N/A | Transaction Fee | 0.0% of Merchandise (\$2.00 Min) |

FULFILLMENT ORDER GROUP

Edit Renew Authorization Ship Finalize Cancel

| | | | | | |
|-----------------|------------|--------------------|----------------------|----------------------|--------------|
| Group ID | 9147225 | Payment Status | Authorized | Subtotal | \$90.00 USD |
| Date Created | 03/26/2019 | Integration Status | Submitted | Shipping | \$6.95 USD |
| Date Completed | | Expiration Date | 04/02/2019 | Sales Tax - KS 8.95% | \$8.68 USD |
| Status | Processing | PO Number | 4547877G9147225 KBak | Transaction Fee | \$2.00 USD |
| Shipping Method | Ground | | | Total | \$107.63 USD |

| PRODUCT CODE | SKU / UPC | DESCRIPTION | MSRP | WHOLESALE | UNIT | QTY | EXTENDED |
|--------------|---------------------------------|--|--------|-----------|-------|-----|----------|
| Not Shipped | | | | | | | |
| 110288 | 1102881D003.115 190340380976 | Ghost 11 Color: Ebony/Grey/Silver Size: 11.5 Width: Reg | 120.00 | 66.00 | 90.00 | 1 | 90.00 |

Transactions and History

PAYMENT TRANSACTIONS



Navigating Admin

From the Order Summary Screen, scroll down to **Transactions and History**, click on Dropdown for more order details

To confirm card authorized, look here
To confirm payment was captured, look here

Here you can see comments, order statuses, payment approvals/denials, etc.

When in doubt, contact your CS partner!

Transactions and History

PAYMENT TRANSACTIONS

| Card Type | Last 4 Digits | Exp: | Avs: | Cvv: | Txn# |
|------------|---------------|-------------------------|---------------|----------|----------------|
| Mastercard | 6317 | 12/2023 | B | | :5C9A57DA60... |
| | | 03/26/2019 10:48 AM MDT | Authorization | Approved | \$1.00 USD |
| | | 03/26/2019 10:49 AM MDT | Void | Approved | \$1.00 USD |
| Mastercard | 6317 | 12/2023 | B | | :5C9A583E9F... |
| | | 03/26/2019 10:50 AM MDT | Authorization | Approved | \$208.93 USD |
| | | 03/26/2019 04:44 PM MDT | Capture | Approved | \$208.93 USD |

STATUS HISTORY

| UPDATED | UPDATED BY | STATUS | COMMENT |
|------------------------|--------------|------------|---|
| 03/26/2019 10:49:21 AM | System Admin | New | Order ready for processing. |
| 03/26/2019 10:49:22 AM | System Admin | Processing | Processed for submittal to manufacturer. |
| 03/26/2019 10:50:00 AM | System Admin | Processing | Payment was authorized for \$208.93 USD. |
| 03/26/2019 10:50:10 AM | System Admin | Processing | Order submitted to manufacturer by system process. |
| 03/26/2019 03:12:32 PM | System Admin | Processing | Order acknowledged by manufacturer. Shipment currently scheduled for 03/26/2019 |
| 03/26/2019 04:39:24 PM | System Admin | Processing | Shipped Date: 03/26/2019 PO Number: 4547158G9146626 Shipped To: 1650 Gemini Pl COLUMBUS, OH 43240-7000 US Tracking Number: 481406230984 Quantity: 1 UPC:753759157739 SKU:753759157739 |
| 03/26/2019 04:39:24 PM | System Admin | Processing | Shipping complete |
| 03/26/2019 04:44:24 PM | System Admin | Processing | Re-authorize payment succeeded |
| 03/26/2019 04:44:25 PM | System Admin | Processed | Authorization was captured for \$208.93 USD |
| 03/26/2019 04:44:25 PM | System Admin | Processed | Group: 9146626 All shipped email sent. Authorization was captured for \$208.93 USD. |



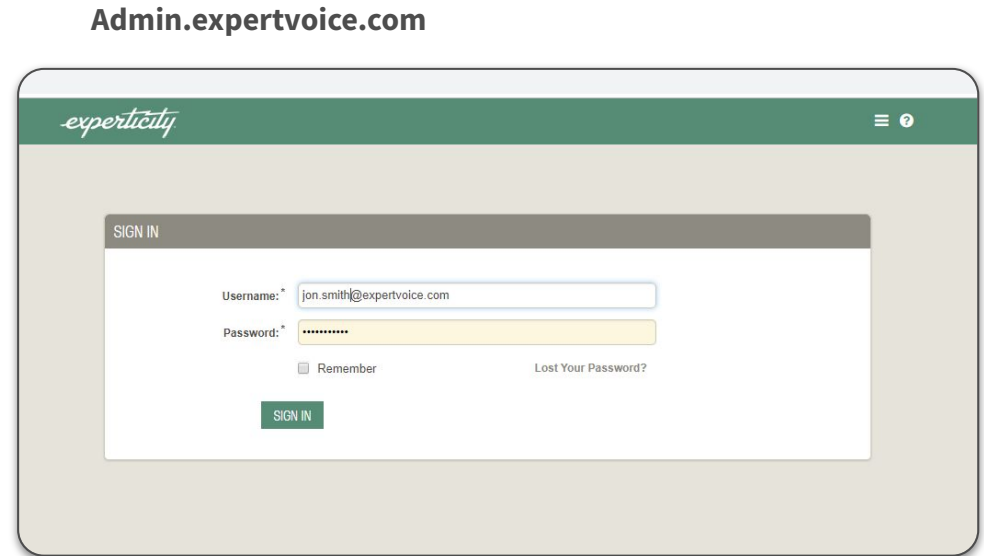
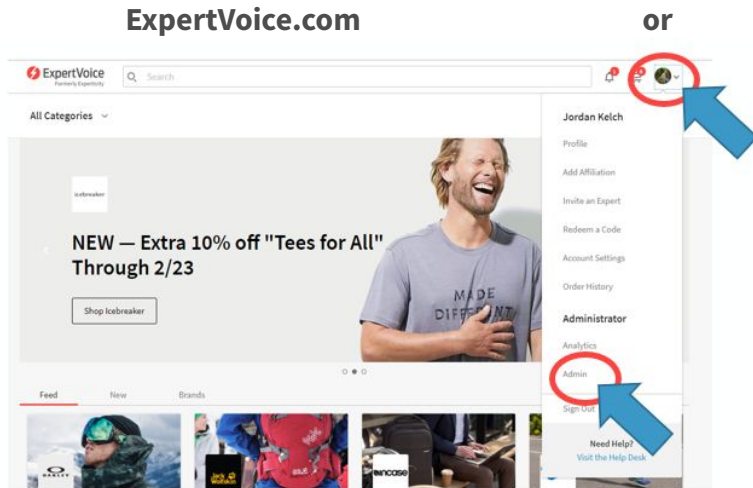
Processing Orders 101

Integration Lite (Export Only)

Processing Orders 101

Follow these steps

1. Login:



Once logged in, click the **profile drop down** in top right corner and select **“Admin”**



Processing Orders 101

Follow these steps

2. Orders to Fulfill:

From the home screen, click the **“Orders”** dropdown, select **“Orders to Fulfill”**

The image shows two screenshots of the experticity dashboard. The top screenshot shows the 'Orders' dropdown menu with 'Orders to Fulfill' selected. The bottom screenshot shows the 'ORDERS TO FULFILL' screen with three tables: 'Orders to Process', 'Recent Exports', and 'Recent Imports'. Red arrows point from the text on the left to the 'Orders to Process' table, the 'Recent Exports' table, and the 'Recent Imports' section.

Orders to Fulfill

Search and manage orders placed for

Orders to Process [PROCESS ORDERS](#)

| FULFILLMENT OUTLET | # OF ORDERS | SUBTOTAL | OLDEST | NEWEST | |
|--------------------|-------------|----------|------------------|------------------|--------------------------------|
| US | 8 | 576.00 | 02/13/2019 00:24 | 02/21/2019 11:02 | RELEASE ORDERS |

Recent Exports [VIEW ALL EXPORTS](#)

| FULFILLMENT OUTLET | EXPORT DATE | # OF ORDERS | SUBTOTAL | OLDEST | NEWEST | |
|--------------------|------------------|-------------|----------|------------------|------------------|-----------------------------|
| US | 02/19/2019 14:50 | 16 | 1042.00 | 02/09/2019 08:24 | 02/19/2019 13:28 | File SEARCH |
| US | 02/11/2019 13:18 | 16 | 788.50 | 02/05/2019 21:48 | 02/11/2019 10:38 | File SEARCH |
| US | 02/05/2019 21:04 | 7 | 456.00 | 02/02/2019 12:29 | 02/05/2019 07:34 | File SEARCH |

Recent Imports [VIEW ALL IMPORTS](#)

[Choose File](#) No file chosen [UPLOAD](#)

This will take you to the main “Orders to Fulfill” screen

- **Orders to Process** are new orders
- **Recent Exports** are previously created order export batches and their corresponding Excel Doc (“File”)



Processing Orders 101

Follow these steps

3. Release Orders:

From the **Orders to Fulfill** screen, In the **Orders to Process** section, click the “**Release Orders**” button

The order batch will move from the “Orders to Process” section to the “Recent Exports” sections.

The screenshot shows the 'experticity' dashboard with the 'ORDERS TO FULFILL' section. The 'Orders to Process' table has a 'RELEASE ORDERS' button circled in red. A blue arrow points from this button to the 'Recent Exports' table, which shows the order batch moved. A yellow arrow points from the 'Orders to Process' table to the 'Recent Exports' table.

| FUFILLMENT OUTLET | # OF ORDERS | SUBTOTAL | OLDEST | NEWEST | |
|-------------------|-------------|----------|------------------|------------------|----------------|
| US | 8 | 576.00 | 02/13/2019 00:24 | 02/21/2019 11:02 | RELEASE ORDERS |

| FUFILLMENT OUTLET | EXPORT DATE | # OF ORDERS | SUBTOTAL | OLDEST | NEWEST | File | SEARCH |
|-------------------|-------------|-------------|----------|------------------|------------------|------|--------|
| US | 2/21/2019 | 8 | 576.00 | 02/08/2019 09:24 | 02/19/2019 13:28 | File | SEARCH |



Clicking “Release Orders” authorizes the card and orders must be shipped in 7 calendar days (168 hours)!



Processing Orders 101

Follow these steps

4. Fulfilling/Shipping New Orders:

In the **Orders to Fulfill** screen, in the **Recent Exports** section, click **“File”** in the line from the recent batch of orders

ORDERS TO FULFILL
Search and manage orders placed 1

Orders to Process PROCESS ORDERS

| FULFILLMENT OUTLET | # OF ORDERS | SUBTOTAL | OLDEST | NEWEST | |
|--------------------|-------------|----------|------------------|------------------|----------------|
| US | 8 | 576.00 | 02/13/2019 00:24 | 02/21/2019 11:02 | RELEASE ORDERS |

Recent Exports VIEW ALL EXPORTS

| FULFILLMENT OUTLET | EXPORT DATE | # OF ORDERS | SUBTOTAL | OLDEST | NEWEST | |
|--------------------|------------------|-------------|----------|------------------|------------------|-------------|
| US | 02/19/2019 14:50 | 16 | 1042.00 | 02/08/2019 09:24 | 02/19/2019 13:28 | File SEARCH |
| US | 02/11/2019 13:18 | 16 | 768.50 | 02/05/2019 21:40 | 02/11/2019 13:18 | File SEARCH |
| US | 02/05/2019 21:04 | 7 | 456.00 | 02/02/2019 12:29 | 02/05/2019 07:34 | File SEARCH |

Example Order Export - Excel

| Order Id | Order Date | Member | Member L | SHIP TO ADDRESS | Shipping Address 1 | Shipping City | Shipping State | Shipping ZIP | Shipping SKU | QTY | Description | Cost of its shipping |
|----------|------------|------------------|---------------------|--------------------------|--------------------|---------------|----------------|--------------|----------------------|-----|-------------------------------|----------------------|
| 12245 | 1/1/2019 | Jessica Pederson | Recreational Equi | 400 El Paseo de Saratoga | San Jose | CA | 95130 | US | TRAILHEAD_BLACK_LARK | 1 | TRAILHEAD PANTS | 44.5 |
| 12345 | 1/2/2019 | John Strope | John Strope | 1398 Rosewood st. | Upland | CA | 91786 | US | ESCALANTE_KACHULA | 1 | KACHULA | 34.5 |
| 12345 | 1/3/2019 | John Strope | John Strope | 1398 Rosewood st. | Upland | CA | 91784 | US | GRANDVIEW_PUFFY_KAI | 1 | PUFFY KACHULA | 54.5 |
| 98745 | 1/4/2019 | Cassie Wandersse | Cassie L. Wandersse | 1381 WANDERSEE RD | DWIGHT | KS | 66849 | US | TRAILHEAD_BROWN_ME | 1 | TRAILHEAD PANTS | 44.5 |
| 98745 | 1/5/2019 | Cassie Wandersse | Cassie L. Wandersse | 1381 WANDERSEE RD | DWIGHT | KS | 66849 | US | TRAILHEAD_BLACK_MED | 1 | TRAILHEAD PANTS | 44.5 |
| 98745 | 1/6/2019 | Cassie Wandersse | Cassie L. Wandersse | 1381 WANDERSEE RD | DWIGHT | KS | 66849 | US | ESCALANTE_KACHULA | 1 | KACHULA | 34.5 |
| 64598 | 1/8/2019 | Joe Smith | Joe Smith | 1201 F Street NW | Washington | DC | 20004 | US | TRAILHEAD_GREY_MED | 1 | TRAILHEAD PANTS | 44.5 |
| 64598 | 1/8/2019 | Joe Smith | Joe Smith | 1201 F Street NW | Washington | DC | 20004 | US | BLACK_SHORT_TRAILHEA | 1 | TRAILHEAD ADVENTURE SHORTS | 34.5 |
| 32144 | 1/9/2019 | John McDevitt | John McDevitt | 10548 Countryside Drive | Grand Lodge | MI | 48837 | US | TRAILHEAD_BLACK_LARK | 1 | TRAILHEAD PANTS | 44.5 |
| 95178 | 1/10/2019 | Hannah Link | Hannah Link | 17 Beaver Lane | Carbonate | CO | 81623 | US | ESCALANTE_KACHULA | 1 | KACHULA | 34.5 |
| 95178 | 1/11/2019 | Hannah Link | Hannah Link | 17 Beaver Lane | Carbonate | CO | 81623 | US | BLUE_DOUBLE_WANDER | 1 | WANDERER DOUBLE HAMMOCK | 32 |
| 99687 | 1/12/2019 | Jason Johnson | Jason S Johnson | 802 First Ave | Deary | ID | 83823 | US | REALTREE_KACHULA | 1 | KACHULA | 39.5 |
| 99687 | 1/13/2019 | Jason Johnson | Jason S Johnson | 802 First Ave | Deary | ID | 83823 | US | NOMAD_PACKABLE_BAC | 1 | NOMAD PACKABLE BACKPACK | 19.5 |
| 33221 | 1/14/2019 | Adrian Simms | Adrian Simms | 4921 Lone Oak Road SE | Salem | OR | 97302 | US | KHAKI_GREEN_DOUBLE | 1 | WANDERER DOUBLE HAMMOCK | 32 |
| 33221 | 1/15/2019 | Adrian Simms | Adrian Simms | 4921 Lone Oak Road SE | Salem | OR | 97302 | US | DOG_BOWL_BROWN | 1 | HOUND BASIN PACKABLE DOG BOWL | 12.5 |

This creates an Excel.csv export batch that includes the order number, order date, member name, shipping, SKU, description, etc.



Processing Orders 101

Follow these steps

5. Shipping Orders:

In the **Orders to Fulfill** screen, in the **Recent Exports** section, click “**Search**” in the line associated with the order batch you’re working on

Scroll down to the bottom of the page, a list of these orders will appear

Click on the first order to begin

experticity

Profile Members Site Content Pro Programs Stores External Content **Orders** Analytics

ORDERS TO FULFILL

Search and manage orders placed for

Orders to Process

| FULFILLMENT OUTLET | # OF ORDERS | SUBTOTAL | OLDEST | NEWEST | |
|--------------------|-------------|----------|------------------|------------------|----------------|
| US | 1 | 54.00 | 03/28/2019 12:27 | 03/28/2019 12:27 | RELEASE ORDERS |

Recent Exports

| FULFILLMENT OUTLET | EXPORT DATE | # OF ORDERS | SUBTOTAL | OLDEST | NEWEST | File | SEARCH |
|--------------------|------------------|-------------|----------|------------------|------------------|------|--------|
| US | 03/28/2019 11:52 | 10 | 553.00 | 03/25/2019 17:35 | 03/28/2019 10:45 | File | SEARCH |
| US | 03/25/2019 11:04 | 12 | 704.50 | 03/20/2019 12:27 | 03/24/2019 20:58 | File | SEARCH |

Orders

| | ORDER ID | DATE | ORDER TYPE | BUYING COMPANY | MEMBER | ORDER STATUS |
|---|----------|------------|------------|-------------------------------|--------|--------------|
| 1 | 4554234 | 03/28/2019 | Retail EPP | Murdoch's Ranch & Home Supply | | Processing |
| | 4550193 | 03/28/2019 | ProMotive | BSA - Boy Scouts of America | | Processing |
| | 4550782 | 03/28/2019 | ProMotive | ExpertVoice | | Processing |
| | 4550249 | 03/27/2019 | ProMotive | Alterra Mountain Co. | | Processing |
| | 4550124 | 03/27/2019 | Retail EPP | Al's Sporting Goods - UT | | Processing |
| | 4549873 | 03/27/2019 | Retail EPP | Freewheel Bike - MN | | Processing |
| | 4549715 | 03/27/2019 | ProMotive | Air Force - Dept. of Defense | | Processing |
| | 4546878 | 03/26/2019 | ProMotive | Garmin | | Processing |
| | 4546170 | 03/25/2019 | ProMotive | USA Climbing | | Processing |
| | 4545826 | 03/25/2019 | ProMotive | The American Alpine Club | | Processing |

Export as: CSV EXCEL



Processing Orders 101

Follow these steps

6. Shipping Orders Continued:

From the **Order Summary** screen,
Click “**Ship**”

- **Amount for this shipment:** Enter Shipping Fee (if needed) in, then click **RECALCULATE**
- **Shipment Date** defaults to current day
- **Reference Order #** and **Vendor Invoice #** are optional
- **Input tracking number,**
 - Only use “N/A” in extremely unique situations where no tracking is available
- Select appropriate **Shipping Carrier Service** (if needed)
- Check “**Finalize Group**”, this captures payment!
- Click “**Submit**”

ORDER SUMMARY

Order Information

Process Cancel Change Payment Comment Set Exception Escalate to Finance Print

GENERAL SHIPPING ADDRESS

Order Id 4551234 Fulfillment Outlet US Murdoch's Ranch & Home Supply
Order Date 03/28/2019 Currency USD
Status Processing
Sold By Expertcity
Shipped By
Name
Email
Shipping Method
Description Free Shipping Over \$50 (Lower 48)
Carrier US Postal Service
Service Standard Service

Order Type Retail EPP
Store Expertcity-Only Pricing - Retail
Buyer Murdoch's Ranch & Home Supply
Location MT - Bozeman - 4 Corners
Team Murdoch's Ranch & Home Supply Retail Employees

FULFILLMENT ORDER GROUP

Edit Renew Authorization **Ship** Finalize Cancel

Group ID 9153434 Payment Status Authorized Subtotal \$34.50 USD
Date Created 03/28/2019 Integration Status Submitted Shipping \$5.00 USD
Date Completed 03/28/2019 Expiration Date 04/04/2019 Transaction Fee \$2.00 USD
System Cancel Date 05/12/2019 Status Processing PO Number 455123409153434 Total \$41.50 USD
Shipping Method Free Shi

SHIP ITEMS

Please select the items to ship:

| Select Items: | FulfillQty | Description |
|-------------------------------------|------------|-----------------------------|
| <input checked="" type="checkbox"/> | 1 | KACHULA Color: Escalante |

Shipping: \$5.00 USD Assigned Amount
 \$5.00 USD Free Shipping Over \$50 (Lower 48)
 Amount for this shipment

RECALCULATE

Shipment Date: 03/28/2019

Reference Order #:

Vendor Invoice #:

Tracking #: INPUT TRACKING #

Shipping Carrier: UPS

Shipping Carrier Service: Ground

Finalize Group

SUBMIT



Processing Orders 101

Follow these steps

7. Confirm Payment was Captured

From the **Order Summary** screen,

- Scroll down to the “**Transactions and History**” section,
- Confirm “**Capture**” was “**Approved**”
- If so, move on to the next order by clicking “**Next**” at the top of the **Order Summary** screen

If you have issues capturing payment, click “**Escalate to Finance**” and contact your CS partner, comments are always helpful!

ORDER SUMMARY « Prev Order 1 of 11 Next »

Order Information

Change Payment Comment Set Exception Escalate to Finance Print

GENERAL SHIPPING ADDRESS

Order Id: 4859235 Fulfillment Outlet: US
Order Date: 03/20/2019 Currency: USD
Status: Processed
Sold By: Expertise
Shipped By: Name: Shipping Method: Description: Free Shipping Over \$50 (Lower 48)
Email: Carrier: US Postal Service
Order Type: ProActive Service: Standard Service
Store: Events-Only Pricing - Pro
Team: 3884 Members

FULFILLMENT ORDER GROUP

| Group ID | Payment Status | Charged | Subtotal | \$44.93 USD |
|---|-------------------------------|---------|---------------------|-------------|
| Date Created: 03/20/2019 | Integration Status: Submitted | | Shipping | \$5.00 USD |
| Date Completed: 03/20/2019 | PO Number: 40332050100768 | | Sales Tax: JAR 8.9% | \$4.47 USD |
| Status: Processed | | | Transaction Fee | \$2.00 USD |
| Shipping Method: Free Shipping Over \$50 (Lower 48) | | | Total | \$56.37 USD |
| | | | Payment | \$56.37 USD |
| | | | Payment Fee | - |
| | | | Commission** | \$0.00 USD |
| | | | Due Vendor | \$42.02 USD |
| | | | ** 1% of item/order | |

PRODUCT CODE SKU L/PC DESCRIPTION MRP WHOLESALE UNIT QTY EXTENDED

| PRODUCT CODE | SKU | L/PC | DESCRIPTION | MRP | WHOLESALE | UNIT | QTY | EXTENDED |
|--------------------------------------|-------------------------------|------|------------------|-------|-----------|-------|-----|----------|
| Shipment # 03/20/2019 6:08 | | | | | | | | |
| US Postal Service - Standard Service | | | | | | | | |
| Tracking # 92743680974403800279 | | | | | | | | |
| TRAILHEAD_PRINTS | TRAILHEAD_BROWN_SMALL_RELAXED | | TRAILHEAD PRINTS | 98.00 | 98.00 | 44.93 | 1 | 44.93 |
| | Color: Brown | | Blank Small | | | | | |

Transactions and History

PAYMENT TRANSACTIONS

| Avs | F | Auth | Authorization | Cvv | Approved | Txn# | :5C924693EC... |
|-------------------------|---------|----------|---------------|-----|----------|------|----------------|
| 03/20/2019 07:56 AM MDT | Void | Approved | \$1.00 USD | | | | |
| 03/20/2019 07:57 AM MDT | Void | Approved | \$1.00 USD | | | | |
| Avs | F | Auth | Authorization | Cvv | Approved | Txn# | :5C925372C1... |
| 03/20/2019 08:51 AM MDT | Capture | Approved | \$55.97 USD | | | | |
| 03/25/2019 10:59 AM MDT | Capture | Approved | \$55.97 USD | | | | |

Transactions and History

PAYMENT TRANSACTIONS

| Avs | F | Auth | Authorization | Cvv | Approved | Txn# | :5C924693EC... |
|-------------------------|---------|----------|---------------|-----|----------|------|----------------|
| 03/20/2019 07:56 AM MDT | Void | Approved | \$1.00 USD | | | | |
| 03/20/2019 07:57 AM MDT | Void | Approved | \$1.00 USD | | | | |
| Avs | F | Auth | Authorization | Cvv | Approved | Txn# | :5C925372C1... |
| 03/20/2019 08:51 AM MDT | Capture | Approved | \$55.97 USD | | | | |
| 03/25/2019 10:59 AM MDT | Capture | Approved | \$55.97 USD | | | | |

Escalate to Finance Comment



Order Summary Emails

Have your CS partner assign the appropriate team members to the **Order Summary Email** list. Order Summary Emails are sent daily (check your spam folder). This is a useful tool for order fulfillment management.

There are 5 sections in the summary:

1. An **Overview Summary of order statuses**
2. Orders that have **shipped but have not completed payment** processing. These orders need payment collected and marked as Escalate to Finance.
3. Orders that have **expired authorizations** need to be reauthorized in Admin. Do not re-authorize a credit card until the authorization is expired and order is ready to ship.
4. Orders flagged as **Exceptions**
5. Ordering pending **cancellation**

ExpertVoice
Formerly Experticity

This is your order summary for June 4, 2019.

| Order Status | # of Orders |
|-----------------------|-------------|
| New | 8 |
| Processing | 172 |
| Payment Failure | 1 |
| Expired Authorization | 23 |
| Exceptioned | 4 |
| Cancellation Pending | 4 |

1 order groups have been shipped but have not completed payment processing. Alternate payment information may need to be collected from the customer.

| Order ID | Group ID | Vendor Id | Date Placed | Order Total |
|----------|----------|-----------|-------------|-------------|
| 4628621 | 9336907 | 15 | 05/13/19 | 259.70 |

23 order groups have expired authorizations, or authorizations that will expire soon. These orders MUST NOT be fulfilled after the expiration date unless a new authorization is secured beforehand. Ideally, these orders should be canceled in both the Experticity system and your internal ERP.

| Order ID | Group ID | Date Placed | Order Total | Auth Expires |
|----------|----------|-------------|-------------|---------------------|
| 4653127 | 9489414 | 05/29/19 | 248.00 | 06/05/19 - TOMORROW |
| 4653206 | 9489828 | 05/29/19 | 202.98 | 06/05/19 - TOMORROW |
| 4654645 | 9499137 | 05/30/19 | 163.20 | 06/06/19 |

4 orders have been flagged with an exception. Please handle the following orders and clear the exception.

| Order ID | Group ID | Date Placed | Order Total | Message |
|----------|----------|-------------|-------------|--|
| 4628621 | 9336907 | 05/13/19 | 259.70 | Payment was declined for \$259.70 USD. |

4 order groups are pending automatic cancellation by the system. These orders should NOT be shipped unless the customer is notified and a new authorization secured.

| Order ID | Group ID | Date Placed | Order Total | Cancellation Eligible as of |
|----------|----------|-------------|-------------|-----------------------------|
| 3712538 | 5668036 | 10/06/17 | 63.19 | 01/11/18 - EXPIRED |
| 4583167 | 9216602 | 04/14/19 | 96.94 | 06/08/19 |



How to Renew an Expired Credit Card Authorization

How to Renew an Expired Credit Card Authorization

Follow these steps

1. Orders to reauthorize:

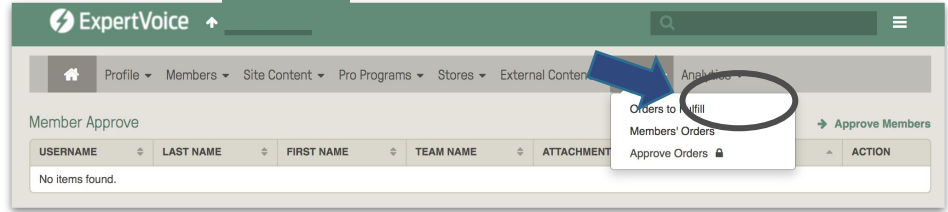
The **Daily Order Email** will identify which orders have expired authorizations and need to be renewed.

***Reminder that you should NOT renew an authorization until the original auth has expired.** Renewing a non-expired auth will lead to the credit card being double-authed & may get declined if there aren't sufficient funds to cover both auths. **You should also NOT renew an authorization until you know that the order will be ready to ship.** A member can see each time their credit card is authorized.

From the home screen, click the “**Orders**” dropdown, select “**Orders to Fulfill**”

In the “**Orders to Fulfill**” screen:

- Search for the **Order ID** that needs to be reauthorized. Click Submit at the bottom
- Order will appear below
- **Select the order**



The screenshot shows the 'ORDERS TO FULFILL' search form. The 'Order Id(s):' field is circled in black. Other fields include 'Order Group Id:', 'Email:', 'Username:', 'First Name:', 'Last Name:', 'Fulfillment Outlet:', 'Store:', 'Date:', and 'Exception:'. The form is titled 'ORDERS TO FULFILL' and 'SEARCH ORDERS'.

The screenshot shows the 'Orders' table with the following data:

| ORDER ID | DATE | ORDER TYPE | BUYING COMPANY | MEMBER | ORDER STATUS |
|----------|------------|------------|--------------------------|----------|--------------|
| 5219445 | 05/05/2020 | ProMotive | The American Alpine Club | Andy Cox | Processing |

Export as: CSV EXCEL



How to Renew an Expired Credit Card Authorization

Follow these steps

2. Reauthorizing an Order:

From the order summary screen

Click “**Renew Authorization**” under the fulfillment order group

Click “**Authorize**” which will restart the 7-day window to capture payment

ExpertVoice + EXPERTVOICE

Organizations Members Site Content External Content Orders Reports Preferences Marketing Integration

BACK Prev Order 4 of 500 Next

ORDER SUMMARY

Order Information

Process Cancel Change Payment Comment Set Exception Txn Profile Adjustment Escalate to Finance

Print

| GENERAL | | PAYMENT | | SHIPPING ADDRESS | |
|-------------------|----------------------|---------------------|-----------|--------------------------|------------------|
| Order Id | 4535821 | Fulfillment Outlet | 100 | Nicholaus Grooms | Nick Grooms |
| Order Date | 03/20/2019 | Currency | USD | Visa XXXXXXXXXXXXXXX9399 | 1031 Donnelly CT |
| Status | Processing | | | 01/2020 | Stil, CO 81652 |
| Sold By | Experticity | | | 1031 E | US |
| Shipped By | Brooks Running | | | Stil, CT | 7194313939 |
| Name | Nick Grooms | | | US | |
| Email | nickgrooms@msn.com | | | | |
| Order Type | | | | | |
| Store | | | | | |
| Vendor Program ID | | | | | |
| Team | Fire and Rescue | | | | |
| Profile Name | Broform | Payment | Authorize | | |
| Commission | 12.5% of Merchandise | Payment Service Fee | N/A | | |

FULFILLMENT ORDER GROUP

Renew Authorization Ship Finalize Cancel

| GROUP ID | Created | Payment Status | Integration Status |
|----------|------------|----------------|----------------------------|
| 9103476 | 03/20/2019 | Authorized | Submitted |
| | | | Expiration Date 03/27/2019 |
| | | | PO Number 453582109103476 |

| PRODUCT CODE | SKU / UPC | DESCRIPTION |
|-----------------|-----------------|--|
| Not Shipped | | |
| 1102941D069.090 | 1102941D069.090 | Adrenaline GTS 19 |
| 190340463105 | 190340463105 | Color: 069 Black/Blue/Nightlife Size: 9.0 Width: R |

To confirm if the reauthorization was successful, refer to the “Navigating Admin” steps (included in next slide as well)

ExpertVoice + EXPERTVOICE

Organizations Members Site Content External Content Orders Reports Preferences

[Back to Order Summary]

RENEW AUTHORIZATION ORDER ACTION

Please confirm the new authorization amount and payment method:

Name: KEVIN R WATSON

Credit Card:

Amount:

Note: Authorizations are only valid for 7 days. This authorization will expire on 04/30/2020. Please complete processing of this group prior to the expiration.

AUTHORIZE CANCEL

How to Renew an Expired Credit Card Authorization

Follow these steps

Double check your work from the Order Summary Screen, scroll down to **Transactions and History**

To confirm card authorized look here

To confirm payment was captured look here

Here you can see comments, order statuses, payment approvals/denials, etc.

When in doubt, contact your CS partner!

Transactions and History

PAYMENT TRANSACTIONS

| Card Type | Last 4 Digits | Exp: | Avs: | Cvv: | Txn# |
|------------|---------------|-------------------------|---------------|----------|----------------|
| Mastercard | 6317 | 12/2023 | B | | :5C9A57DA60... |
| | | 03/26/2019 10:48 AM MDT | Authorization | Approved | \$1.00 USD |
| | | 03/26/2019 10:49 AM MDT | Void | Approved | \$1.00 USD |
| Mastercard | 6317 | 12/2023 | B | | :5C9A583E9F... |
| | | 03/26/2019 10:50 AM MDT | Authorization | Approved | \$208.93 USD |
| | | 03/26/2019 04:44 PM MDT | Capture | Approved | \$208.93 USD |

STATUS HISTORY

| UPDATED | UPDATED BY | STATUS | COMMENT |
|------------------------|--------------|------------|---|
| 03/26/2019 10:49:21 AM | System Admin | New | Order ready for processing. |
| 03/26/2019 10:49:22 AM | System Admin | Processing | Processed for submittal to manufacturer. |
| 03/26/2019 10:50:00 AM | System Admin | Processing | Payment was authorized for \$208.93 USD. |
| 03/26/2019 10:50:10 AM | System Admin | Processing | Order submitted to manufacturer by system process. |
| 03/26/2019 03:12:32 PM | System Admin | Processing | Order acknowledged by manufacturer. Shipment currently scheduled for 03/26/2019 |
| 03/26/2019 04:39:24 PM | System Admin | Processing | Shipped Date: 03/26/2019 PO Number: 4547158G9146626 Shipped To: 1650 Gemini Pl COLUMBUS, OH 43240-7000 US Tracking Number: 481406230984 Quantity: 1 UPC:753759157739 SKU:753759157739 |
| 03/26/2019 04:39:24 PM | System Admin | Processing | Shipping complete |
| 03/26/2019 04:44:24 PM | System Admin | Processing | Re-authorize payment succeeded |
| 03/26/2019 04:44:25 PM | System Admin | Processed | Authorization was captured for \$208.93 USD. |
| 03/26/2019 04:44:25 PM | System Admin | Processed | Group: 9146626 All shipped email sent. Authorization was captured for \$208.93 USD. |



How to Cancel Orders & Process Returns

How to Cancel Orders & Process Returns

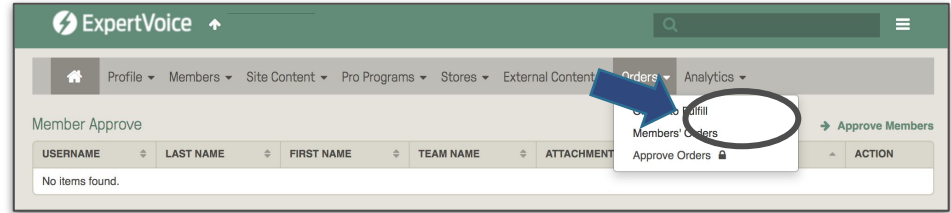
Follow these steps

1. Orders to Cancel or Refund:

From the home screen, click the “**Orders**” dropdown, select “**Orders to Fulfill**”

In the “**Orders to Fulfill**” screen:

- Search for the **Order ID** that needs to be reauthorized. Click Submit at the bottom
- Order will appear below
- **Select the order**



The screenshot shows the 'ORDERS TO FULFILL' search form. The 'SEARCH ORDERS' section is highlighted with a black oval. The form includes fields for Order ID, Order Group ID, Email, Username, First Name, Last Name, Fulfillment Outlet, Store, Date, and Exception.

The screenshot shows the 'Orders' table with one row of data. A blue arrow points to the 'ORDER ID' column, and the value '5219445' is circled in black.

| ORDER ID | DATE | ORDER TYPE | BUYING COMPANY | MEMBER | ORDER STATUS |
|----------|------------|------------|--------------------------|----------|--------------|
| 5219445 | 05/05/2020 | ProMotive | The American Alpine Club | Andy Cox | Processing |



How to Cancel Orders & Process Returns

Follow these steps

2. Cancelling an Order:

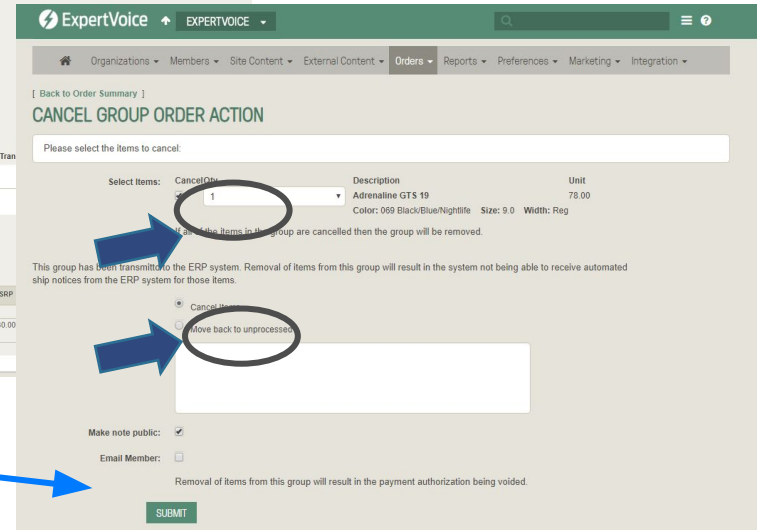
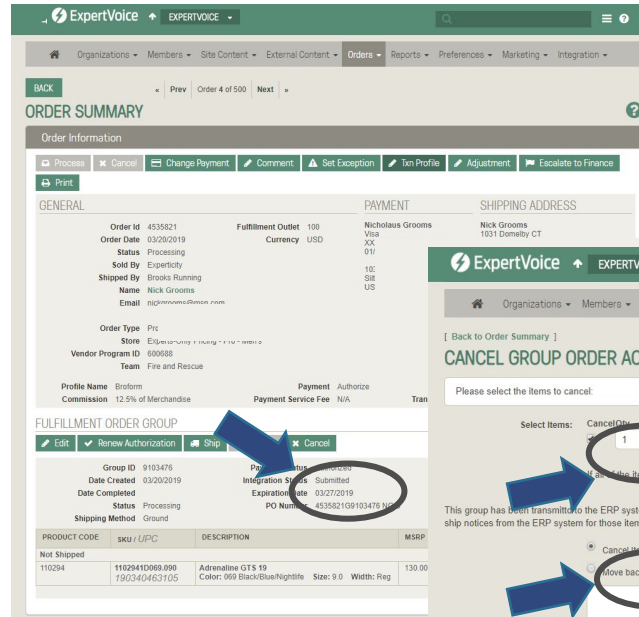
From the Order Summary screen:

- Click “**Cancel**”
- Select the items to be cancelled,
- Select “**Cancel Items**”
- Input a comment if desired
- Click “**Submit**”

“**Make note public**” means the member can see the comment in their profile

“**Email Member**” will email the comment to the member

Both unchecked means only ExpertVoice and your employees with admin rights can see the comment



How to Cancel Orders & Process Returns

Follow these steps

3. Refund/Return:

From the order summary screen
Click **“Return”**

Select the items to be returned
Adjust shipping if applicable

Click **“Recalculate”** and confirm the total

Input a comment if desired

“Make note public” means the member can see the comment!

Unchecked means only ExpertVoice and your employees with Admin rights can see the comment. **NOTE: We** recommend adding the RA# or RMA# here.

The screenshot displays the ExpertVoice interface. The top navigation bar includes 'ExpertVoice' and various menu items like 'Profile', 'Members', 'Site Content', 'Pro Programs', 'Stores', 'External Content', 'Orders', and 'Analytics'. The main content area is divided into two sections: 'ORDER SUMMARY' and 'RETURN ORDER'.
The 'ORDER SUMMARY' section shows 'Order Information' with buttons for 'Change Payment', 'Comment', 'Set Exception', 'Escalate to Finance', and 'Print'. Below this is a 'GENERAL' section with fields for 'Order Id', 'Order Date', 'Status', 'Sold By', 'Shipped By', 'Order Type', 'Store', and 'Team'. A 'SHIPPING ADDRESS' section follows with 'John Doe', '123 Main St.', and 'Seattle, WA 11111'. A 'FULFILLMENT ORDER' section is also visible with 'Edit' and 'Return' buttons. The 'Return' button is circled in red, and a blue arrow points to it.
The 'RETURN ORDER' section shows a table of items to be returned with columns for 'Select Items', 'ReturnQty', 'Description', and 'Unit'. Below the table are fields for 'Subtotal', 'Shipping', 'Sales Tax - UT 6.85%', and 'Transaction Fee'. A 'Total' field shows '\$0.00 USD' with a 'RECALCULATE' button circled in red and a blue arrow pointing to it. At the bottom, there is a 'Return Comment' field and a 'Make note public:' checkbox which is checked. A 'SUBMIT' button is circled in red, and a blue arrow points to it.



