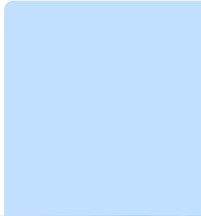
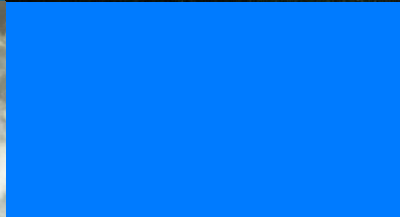


Order Processing



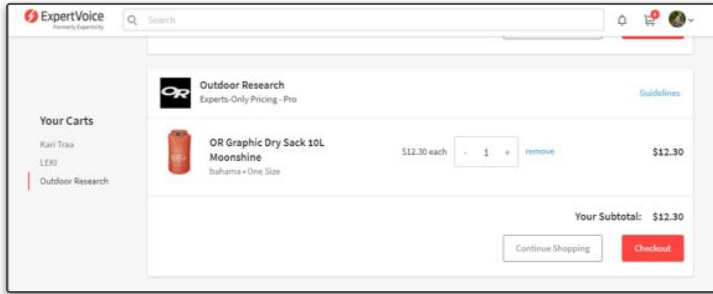
Order Processing

- Admin Overview
- Order Processing 101
- How to Renew an Expired Credit Card Authorization
- How to Cancel Orders & Process Returns

Admin Overview

ExpertVoice Overview

1. Customers place orders on ExpertVoice.com



2. Order fulfillment manager gets order info from admin.expertvoice.com

We call this "Admin." This is where you'll manage orders, reports, members, etc.

3. Brand fulfills orders

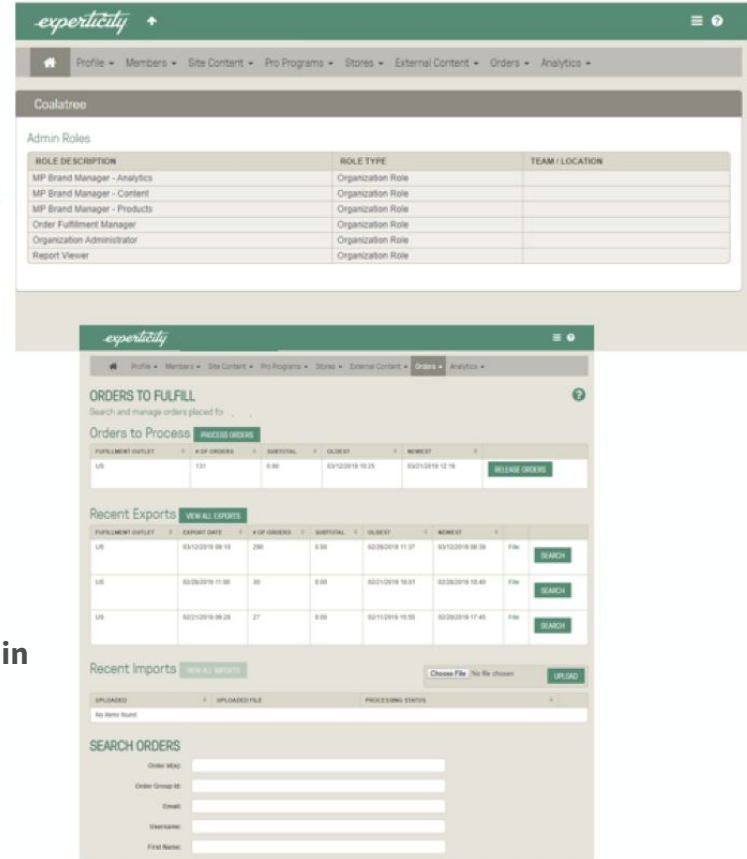


4. Order fulfillment manager inputs tracking number and captures payment in Admin



5. Customer leaves awesome review

"Admin"

A hand-drawn black arrow pointing from the word "Admin" towards the admin interface screenshot on the right.

Navigating Admin

Click on an order to view the Order Summary screen



Edit

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



Renew Authorization

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.



Ship

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



Cancel

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



Finalize

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

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 Item Profile Adjustment Escalate to Finance

Print

GENERAL	PAYMENT	SHIPPING ADDRESS
Order Id: 4547877	Fulfillment Outlet: 100	
Order Date: 03/26/2019	Currency: USD	
Status: Processing		
Sold By: Experticy		
Shipped By: Brooks Running		
Name: Email:		
Order Type: ProMotive		
Store: Experts-Only Pricing - Pro - Men's		
Vendor Program ID: 600885		
Team: U.S. Army - Military		
Profile Name: Brofom	Payment: Authorize	Integration: Automatic
Commission: 12.5% of Merchandise	Payment Service Fee: N/A	Transaction Fee: 0.0% of Merchandise [32.00 Min]

FULFILLMENT ORDER GROUP

Edit Renew Authorization Ship Finalize Cancel

GROUP ID	Payment Status	Subtotal
9147225	Authorized	\$90.00 USD
Date Created: 03/26/2019	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							
110238	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

Visa	Last 4 Digits:1360 Exp: 11/2021	Avs: B	Cvc:	Txn#:5C9AAA42B8...
	03/26/2019 04:16 PM MDT	Authorization	Approved	\$1.00 USD
	03/26/2019 04:16 PM MDT	Void	Approved	\$1.00 USD
Visa	Last 4 Digits:1360 Exp: 11/2021	Avs: B	Cvc:	Txn#:5C9AA50277...
	03/26/2019 04:17 PM MDT	Authorization	Approved	\$107.63 USD

STATUS HISTORY

UPDATED	UPDATED BY	STATUS	COMMENT
03/26/2019 04:16:56 PM	System Admin	New	Order ready for processing.



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 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.

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

Mastercard	Last 4 Digits:6317 Exp: 12/2023	Avs: B	Cvv:	Txn# :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	Last 4 Digits:6317 Exp: 12/2023	Avs: B	Cvv:	Txn# :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 10:50:06 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.





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 orders 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

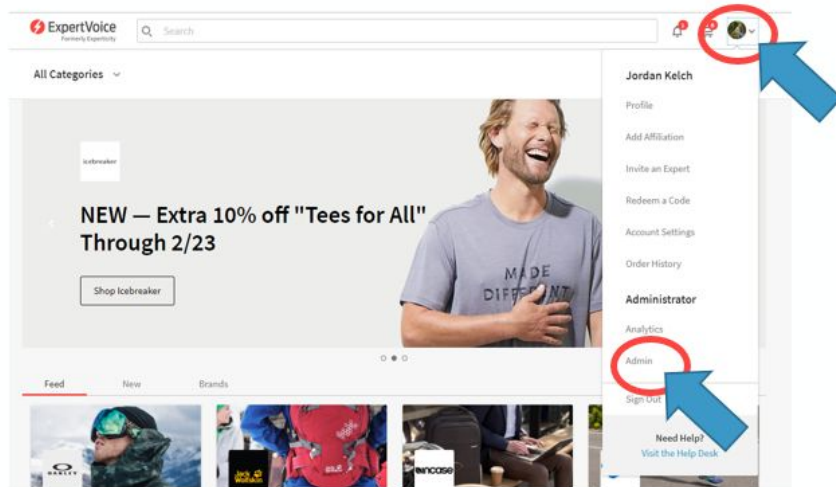
Processing Orders 101

Processing Orders 101

Follow these steps

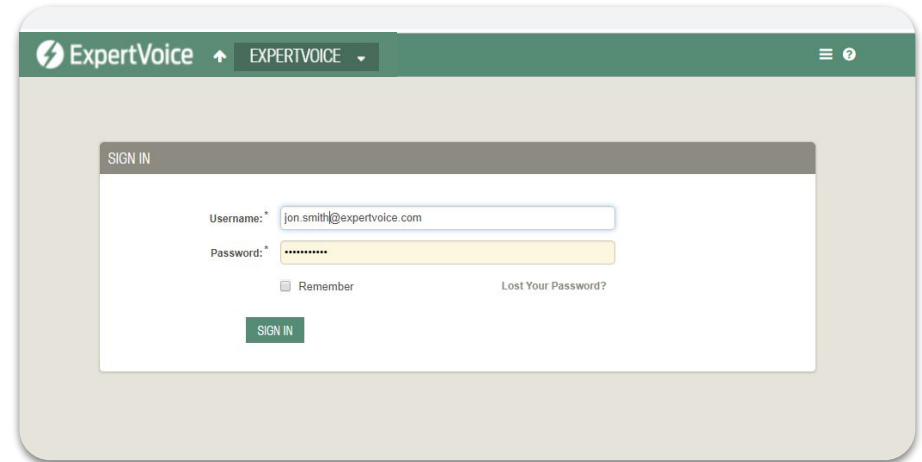
1. Login:

ExpertVoice.com



or

Admin.expertvoice.com



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**,”

In the “**Order Status**” section,
select the “**New**” drop down

Submit

Orders will appear at the bottom of the
screen

Click on the order

The screenshot shows the ExpertVoice interface for managing orders. The top navigation bar includes 'Orders' and 'Analytics'. The 'Orders' dropdown menu is open, with 'Orders to Fulfill' selected. The main section is titled 'ORDERS TO FULFILL' and contains a search form with various filters. The 'Order Status' dropdown is set to 'New'. Below the search form is a table of orders.

ORDER ID	DATE	ORDER TYPE	BUYING COMPANY	MEMBER	ORDER STATUS
4553457	03/29/2019	Retail EPP			New



Processing Orders 101

Follow these steps

3. Verify the information provided

Verify the firearm ordered can be shipped to the receiving state

Verify the FFL Certificate is attached and valid. Look up receiving FFL in ATF Database to confirm status/address

If everything is valid, move the order into "Processing".

UPLOADED FILENAME	USER	DATE
ExpertVoice FFL License.pdf	Store Test	04/06/2020 01:11 PM MDT

Federal Firearms License
(18 U.S.C. Chapter 44)

U.S. Department of Justice
Division of Alcohol, Tobacco, Firearms and Explosives

Licensee Name: Adam Green
Address: 9 EXCHANGE PLACE SUITE 1000, SALT LAKE CITY, UT 84111

License Number: 9-97-035-01-2H-04187
Issue Date: August 1, 2022



Processing Orders 101

Follow these steps

ORDER SUMMARY

Order Information

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

Print

GENERAL	PAYMENT	SHIPPING ADDRESS
Order Id 5168601 Fulfillment Outlet US Order Date 04/06/2020 Currency USD Status New Sold By Experticity Shipped By CANARY TEST MANUFACTURER Name Store Test Email storetest@expertvoice.com Order Type Retail EPP Store FFL - TEST STORE Guidelines Version 7870 Buyer Experticity Store Test Location Experticity Team Experticity Store Test Retail Employees Profile Name Canary Test Profile - Hosted Commission N/A	Adam Green Visa XXXXXXXXXXXX3248 07/2023 1720 E Misty Meadows Cir Sandy, UT 84093 US Chase Paymentech - Orbital Gateway	Adam Green c/o Expertvoice Inc FFL 9 Exchange Place Suite 1000 Salt Lake City, UT 84111 US 7022368176 Shipping Method \$20 Flat Rate Shipping Carrier FedEx Ground Description FedEx Ground Integration None canarytest Transaction Fee N/A

ATTACHMENTS

UPLOADED FILENAME	USER	DATE
ExpertVoice FFL License.pdf	Store Test	04/06/2020 01:11 PM MDT

Drop files here to upload

UNPROCESSED

PRODUCT CODE	SKU / UPC	DESCRIPTION	MSRP	WHOLESALE	UNIT	QTY	EXTENDED
NERFZOMBIEBLASTER	NZB123	NERF ZOMBIE STRIKE ALTERNATOR BLASTER Rounds: 10 Rounds Caliber: 20 Length: 12.5 Inches META_REQUIRES_FFL: Requires FFL	299.99	299.99	164.99	2	329.98
		Subtotal					\$329.98 USD
		Shipping					\$20.00 USD
		Sales Tax - UT 7.25%					\$23.91 USD
		Total					\$373.89 USD

Print

GENERAL PAYMENT SHIPPING ADDRESS

Order Id: 5168601 Fulfillment Outlet: FFL Adam Green Adam Green c/o Expertvoice Inc FFL

ExpertVoice%20FFL%20License.pdf

U.S. Department of Justice
Bureau of Alcohol, Tobacco, Firearms and Explosives
Federal Firearms License
(18 U.S.C. Chapter 44)

In accordance with the provisions of 18 U.S.C. Chapter 44, and the regulations issued thereunder 27 CFR Part 209, you are licensed to engage in the business specified in this license, within the limitations of Chapter 44, Title 18, United States Code, and the regulations issued thereunder, until the expiration date shown. THIS LICENSE IS NOT TRANSFERABLE UNDER 27 CFR 209.41. See "WARNING" and "NOTICES" on reverse.

Direct ATF ATF - Chief, FFLC License # **9-87-035-01-2H-04187**
Correspondence To: 244 North Road Registration **August 1, 2022**
Methuen, WV 25803-9621 Expiration Date

Chief, Federal Firearms Licensing Center (FFLC)
Name: *Harry Robinson*
EXPERTVOICE INC

Business Address (Changes? Note: the FFLC will send 30 day notice otherwise)
**9 EXCHANGE PLACE SUITE 1000
SALT LAKE CITY, UT 84111**
Type of license:
01-DEALER IN FIREARMS OTHER THAN DESTRUCTIVE DEVICES
Purchasing Certificate Notation Mailing Address (Changes? Note: the FFLC will send 30 day notice otherwise)
The license holder shall not use a copy of this license to avoid a violation of Federal law, to verify the identity and the licensed status of the licensee is provided to 27 CFR Part 209. EXPERTVOICE, INC
9 EXCHANGE PLACE SUITE 1000
SALT LAKE CITY, UT 84111

Signature of Licensee: *Tom Seckel* CEO Function Title
Date: *07/29/19* Date ATF Form 100 (11)
Revised 2/10/15

Federal Firearms License (FFL) Customer Service Information
Federal Firearms Licensing Center (FFLC) F-80 Fax: (800) 257-3700 ATF Homepage: www.atf.gov
244 North Road E-800 Fax Number: (866) 257-2740 FFL of Check: www.atfinfo.gov/fflcheck
Methuen, WV 25803-9601 E-mail: fflic@atf.gov

Change of address: 27 CFR 209.42. Licensees may, during the term of their current license, change their business or activity to a new location at which they intend regularly to carry on such business or activity by filing an Application for an Amended Federal Firearms License, ATF Form 5000-30, as required, not less than 30 days before the change.

Page: 1 of 1 Automatic

Under Attachments, you can download, add, or remove any documents.

By hovering or clicking on the documents, this will provide a preview.



Processing Orders 101

Follow these steps

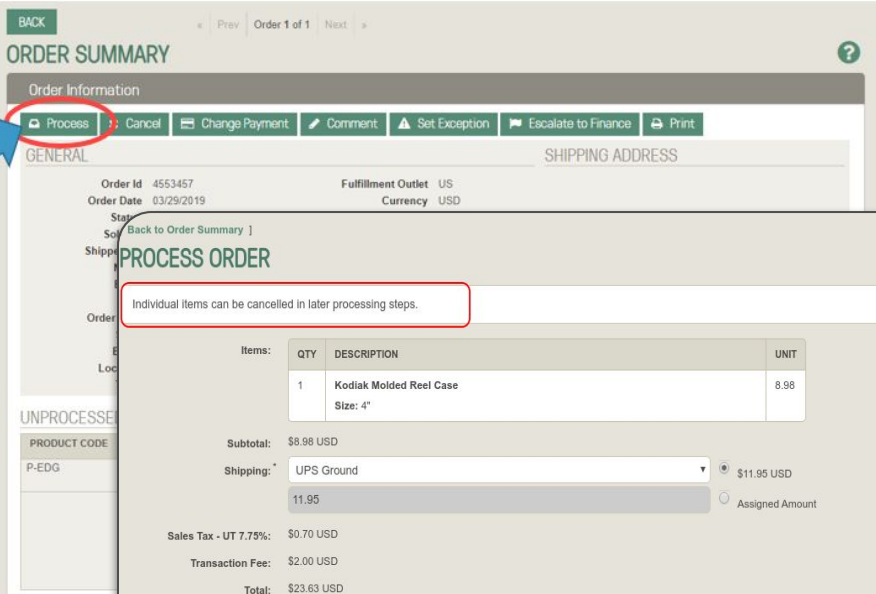
4. Process Order:

Clicking on the order will take you to the **Order Summary** screen,

Click “**Process**,”

Individual items can be cancelled or moved to a new order group in later processing steps

Select **Shipping** method



The screenshot shows the 'ORDER SUMMARY' interface. A blue arrow points to the 'Process' button in the 'Order Information' toolbar. A modal window titled 'PROCESS ORDER' is overlaid on the screen. A red box highlights the text 'Individual Items can be cancelled in later processing steps.' inside the modal. The modal contains a table of items, a subtotal, shipping options, and a 'RECALCULATE' button.

ORDER SUMMARY

Order Information

Process Cancel Change Payment Comment Set Exception Escalate to Finance Print

GENERAL SHIPPING ADDRESS

Order Id 4553457 Fulfillment Outlet US
Order Date 03/29/2019 Currency USD

State [Back to Order Summary]
Shipping

PROCESS ORDER

Individual Items can be cancelled in later processing steps.

Items:	QTY	DESCRIPTION	UNIT
	1	Kodiak Molded Reel Case Size: 4"	8.98

Subtotal: \$8.98 USD

Shipping: UPS Ground \$11.95 USD
Assigned Amount

Sales Tax - UT 7.75%: \$0.70 USD

Transaction Fee: \$2.00 USD

Total: \$23.63 USD

RECALCULATE

Processing Note:

Make note public:

Reference Order #:

Vendor Invoice #:

System Cancel Date:

Automatically cancel all unshipped items in the group on this date.

SUBMIT



Processing Orders 101

Follow these steps

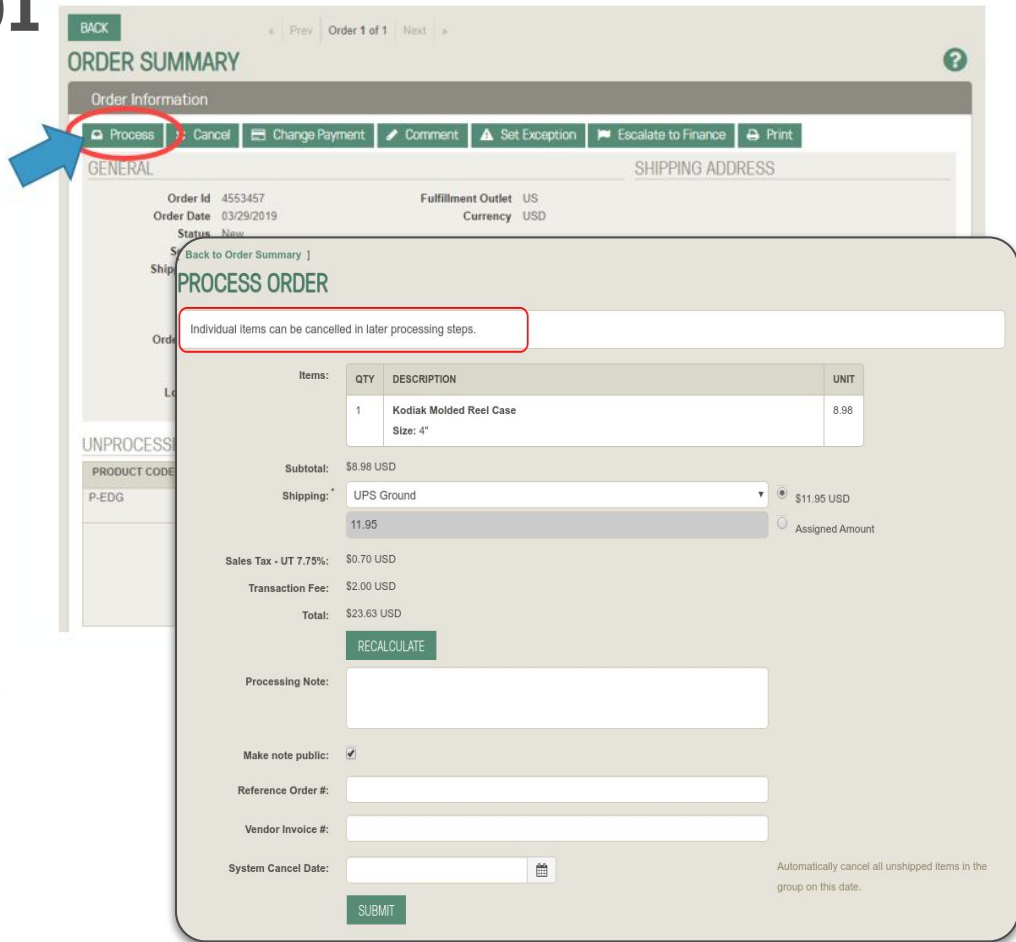
5. Leave a Processing Note:

Leave a **Processing Note** letting the member know the order has been approved and the expected lead time.

Example:

Hello, Thank you for your order from BRAND. We have your information on hand and will start the order process. Just so you are aware, due to an extremely high demand, our shipping times are now 4-6 weeks. If you have any questions, please don't hesitate to email me at EMAIL ADDRESS, or call me at XXX-XXX-XXXX.

Submit



BACK | Prev | Order 1 of 1 | Next | ?

ORDER SUMMARY

Order Information

Process | Cancel | Change Payment | Comment | Set Exception | Escalate to Finance | Print

GENERAL | SHIPPING ADDRESS

Order Id: 4553457 | Fulfillment Outlet: US
Order Date: 03/29/2019 | Currency: USD
Status: New
Ship to: [Back to Order Summary]

PROCESS ORDER

Individual items can be cancelled in later processing steps.

Items:	QTY	DESCRIPTION	UNIT
	1	Kodiak Molded Reel Case Size: 4"	8.98

Subtotal: \$8.98 USD

Shipping: UPS Ground | \$11.95 USD
 Assigned Amount

Sales Tax - UT 7.75%: \$0.70 USD
Transaction Fee: \$2.00 USD
Total: \$23.63 USD

RECALCULATE

Processing Note:

Make note public:

Reference Order #:

Vendor Invoice #:

System Cancel Date:

SUBMIT

Automatically cancel all unshipped items in the group on this date.



How to Renew an Expired Credit Card Authorization

Follow these steps

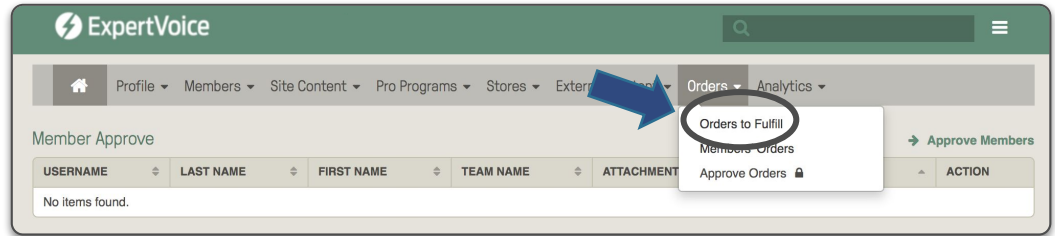
6. Orders to reauthorize:

***Reminder that you should not renew an authorization until the first one has expired.** Renewing a non-expired auth will lead to the member being double-authed and 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 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. The form includes fields for Order Group Id, Email, Username, First Name, Last Name, Fulfillment Outlet, Store, Date, and Exception.

The screenshot shows the 'Orders' table. The first row is circled in black. A blue arrow points to the 'Orders' header. Below the table, there are 'Export as:' buttons for 'CSV' and 'EXCEL'.

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



Processing Orders 101

Follow these steps

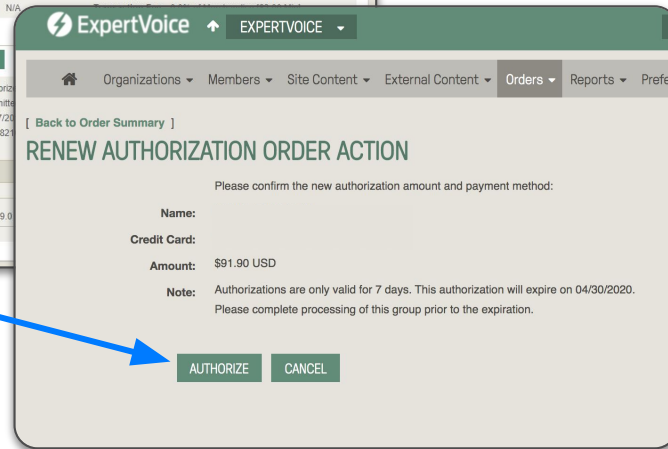
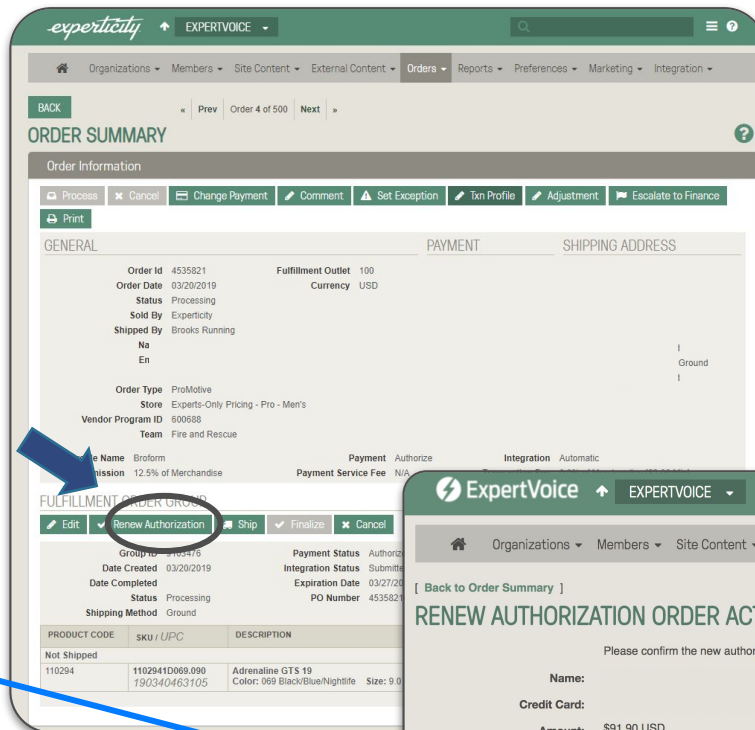
7. Reauthorizing an Order:

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

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



Processing Orders 101

Follow these steps

8. Reauthorizing an Order:

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:	Auth Status	Amount
Mastercard	6317	12/2023	Approved	\$1.00 USD
Mastercard	6317	12/2023	Approved	\$208.93 USD
Mastercard	6317	12/2023	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 10:50:06 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

Follow these steps

9. Ship Order:

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

Select Items: All items will be selected, unselect items that are out of stock or for any reason not being shipped

Select **Shipping** method,

Reference Order # and Vendor Invoice # are **optional**,

Input tracking number, if no tracking number input N/A

Select “**Finalize Group**,” this captures payment!

Submit

ORDER SUMMARY

Order Information

Process Cancel Change Payment Comment Set Exception Escalate to Finance Print

GENERAL **SHIPPING ADDRESS**

Order Id 4550145 Fulfillment Outlet US
Order Date 03/28/2019 Currency USD
Status Processing
Sold By Experticity
Shipped By
Name
Email
Shipping Method Description Standard Shipping
Carrier UPS
Service Ground

Order Type
Store
Buyer
Location ON - Ottawa
Team Cabela's - CAN Retail Emplo

FULFILLMENT ORDER GROUP

Edit Renew Authorization **Ship** Finalize Cancel

Group ID 9153034 Payment Status Authorized Subtotal \$22.49 USD
Date Created 03/28/2019 Expiration Date 04/04/2019 Shipping \$5.00 USD
Transaction Fee \$2.00 USD
Total \$29.49 USD

MSRP	WHOLESALE	UNIT	QTY	EXTENDED
44.99	22.49	22.49	1	22.49

SHIP ITEMS

Please select the items to ship:

Select Items: FulfillQty Description
 1 Piranta EDGE
Color: Blaze Orange GRIP COLOR: Black

Shipping: \$5.00 USD Assigned Amount
 \$5.00 USD Standard Shipping
 Amount for this shipment

RECALCULATE

Shipment Date: 03/29/2019

Reference Order #: 1134125

Vendor Invoice #:

Tracking #: INPUT TRACKING NUMBER HERE

Shipping Carrier: UPS

Shipping Carrier Service: Ground

Finalize Group:

SUBMIT



Processing Orders 101

Follow these steps

10. 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!

GROUP ID	DATE CREATED	DATE COMPLETED	STATUS	SHIPPING METHOD	PAYMENT STATUS	INTEGRATION STATUS	PO NUMBER	SUBTOTAL	SHIPPING	SALES TAX	TRANSACTION FEE	TOTAL
9107758	03/20/2019	03/20/2019	Processed	Free Shipping Over \$50 (Lower 48)	Charged	Submitted	435528509100758	\$44.93 USD	\$5.00 USD	\$4.47 USD	\$2.00 USD	\$55.97 USD

PRODUCT CODE	SKU / UPC	DESCRIPTION	MSRP	WHOLESALE	UNIT	QTY	EXTENDED
Equipment #1	03/20/2019 6:08	US Postal Service - Standard Service					
Tracing #	6274836001744203893379						
TRAILHEAD_PARTS	TRAILHEAD_BROWN_SMALL_RELAXED	TRAILHEAD PARTS Color: Brown Size: Small	\$9.00	\$9.00	44.50	1	44.50

Visa	Last 4 Digits	Exp	Time	Avs	F	Cvv	Txn#	Amount

Visa	Last 4 Digits	Exp	Time	Avs	F	Cvv	Txn#	Amount

Escalate to Finance Comment



How to Cancel Orders & Process Returns

How to Cancel Orders & Process Returns

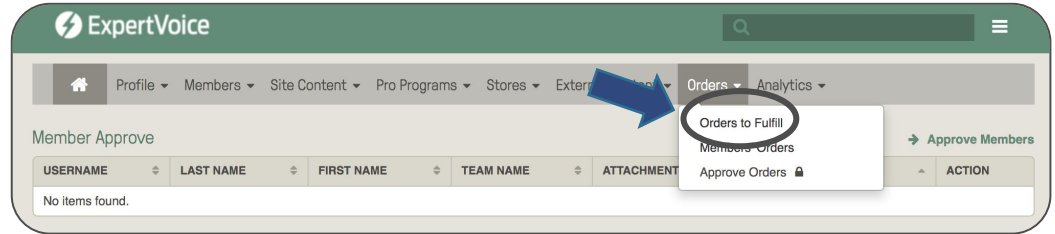
Follow these steps

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. The 'Order Id(s):' field is circled in black. The form includes fields for Order Group Id, Email, Username, First Name, Last Name, Fulfillment Outlet, Store, Date, and Exception.

The screenshot shows the 'Orders' table. The table has columns for ORDER ID, DATE, ORDER TYPE, BUYING COMPANY, MEMBER, and ORDER STATUS. The first row contains the order ID 5219445, dated 05/05/2020, of type ProMotive, for The American Alpine Club, member Andy Cox, with a status of Process. A blue arrow points to the 'Orders' header, and another blue arrow points to the order ID 5219445. Below the table, there are options to export as CSV or EXCEL.

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



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”**

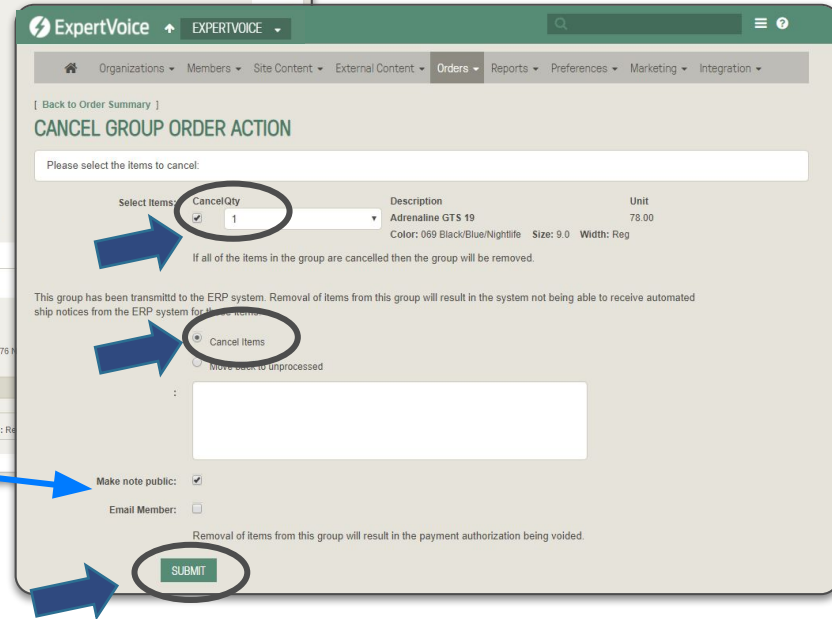
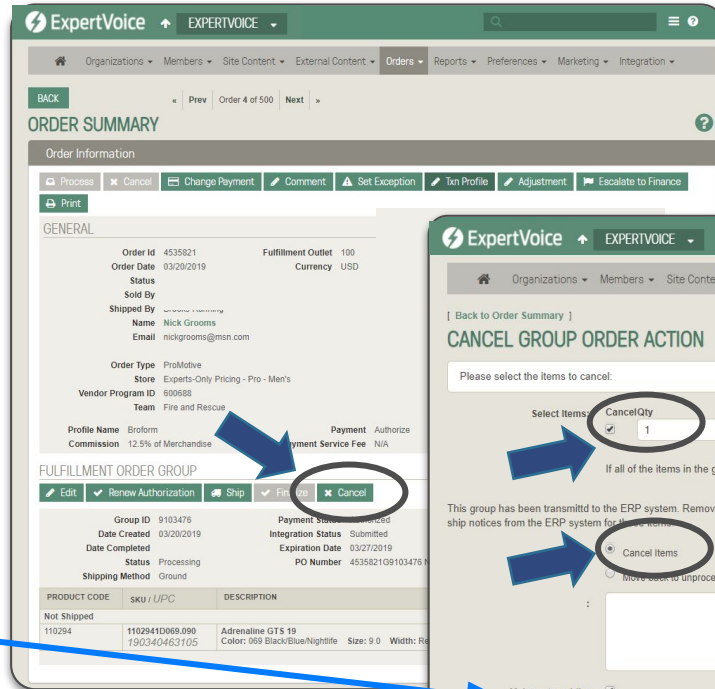
Input a comment if desired

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.

The image displays two screenshots of the ExpertVoice web application interface, illustrating the steps to create a return order.

Left Screenshot: ORDER SUMMARY

- Navigation: Profile, Members, Site Content, Pro Programs, Stores, External Content, Orders, Analytics.
- Buttons: BACK, Change Payment, Comment, Set Exception, Escalate to Finance, Print.
- Order Information Section:
 - GENERAL: Order Id, Order Date (03/08/2019), Status (Processed), Sold By (Experticity), Shipped By (John Doe), Order Type (ProActive), Store (Experts-Only Pricing - Pro), Team (Coaltree Employees).
 - Fulfillment Outlet: US, Currency: USD.
 - SHIPPING ADDRESS: John Doe, 123 Main St, Seattle, WA 11111.
 - Shipping Method: Free Shipping Over \$50 (Lower 48).
- FULFILLMENT ORDER CA: Edit, **Return** (circled in red with a blue arrow).
- Table:

Group ID	Date Created	Payment Status	Charged
03/12/2019	03/12/2019	Integration Status	Submitted
PO Number	4513496C		
- Shipping Method: Free Shipping Over \$50 (Lower 48).
- Table:

PRODUCT CODE	SKU / UPC	DESCRIPTION
GRANDVIEW_KACHULA	GRANDVIEW_KACHULA	KACHULA Color: Grandview
- Footer: Transactions and History.

Right Screenshot: RETURN ORDER

- Navigation: Organizations, Members, Site Content, External Content, Orders, Reports, Preferences, Marketing, Integration.
- Buttons: Back to Order Summary, Recalculate, Submit.
- Section: RETURN ORDER. The following items will be returned:
- Table:

Select Items:	ReturnQty	Description	Unit
<input type="checkbox"/>	1	ICON SC Blue	7.99
<input type="checkbox"/>	2	Icon soft-Brown Stripe	13.98
<input type="checkbox"/>	1	Icon soft-Black/Green	13.98
<input type="checkbox"/>	1	Ink'd Oliver-Red/White	7.98
- Subtotal: \$0.00 USD
- Shipping: 0
- Sales Tax - UT 6.85%: \$0.00 USD
- Transaction Fee: \$0.00 USD
- Total: **RECALCULATE** \$0.00 USD (circled in red with a blue arrow).
- Return Comment: [Text Area]
- Make note public: (checked).
- Submit: **SUBMIT** (circled in red with a blue arrow).



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



