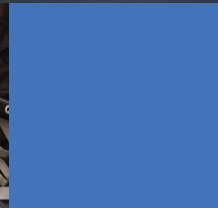


Order Processing



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



How to Cancel Orders

How to Cancel Orders

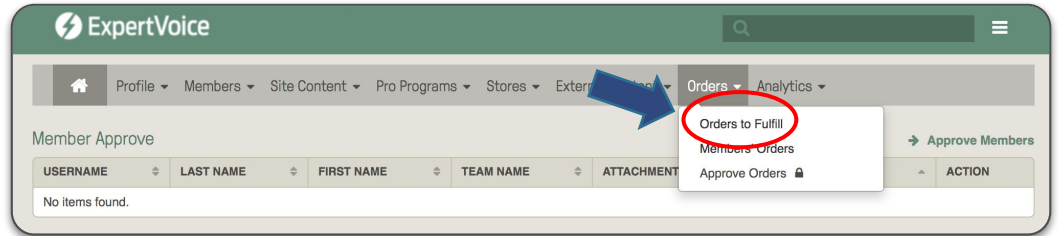
Follow these steps

1. Orders to Cancel:

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 highlighted with a red oval. The form includes fields for Order Group Id, Email, Username, First Name, Last Name, Fulfillment Outlet, Store, Date, and Exception. The search results section is currently empty.

The screenshot shows the 'Orders' table. The first row is highlighted with a blue arrow and a red circle around the 'ORDER ID' column. The table has columns for ORDER ID, DATE, ORDER TYPE, BUYING COMPANY, MEMBER, and ORDER STATUS. The first row contains the following data:

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

Export as: CSV EXCEL

How to Cancel Orders

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

NOTE: Leaving both boxes unchecked means only ExpertVoice & your employees with Admin rights can see the comment.

The image displays two screenshots from the ExpertVoice system. The first screenshot shows the 'ORDER SUMMARY' screen with the 'FULFILLMENT ORDER GROUP' section. A blue arrow points to the 'Cancel' button in the 'FULFILLMENT ORDER GROUP' section. The second screenshot shows the 'CANCEL GROUP ORDER ACTION' screen. A blue arrow points to the 'Cancel Qty' dropdown menu, another blue arrow points to the 'Cancel Items' radio button, a third blue arrow points to the 'Make note public' checkbox, a fourth blue arrow points to the 'Email Member' checkbox, and a fifth blue arrow points to the 'SUBMIT' button.



