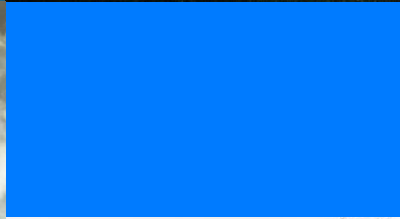


Order Processing



Order Processing

- Order Fulfillment Manager Role & Responsibilities
- EDI Review
- Admin Overview
- 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



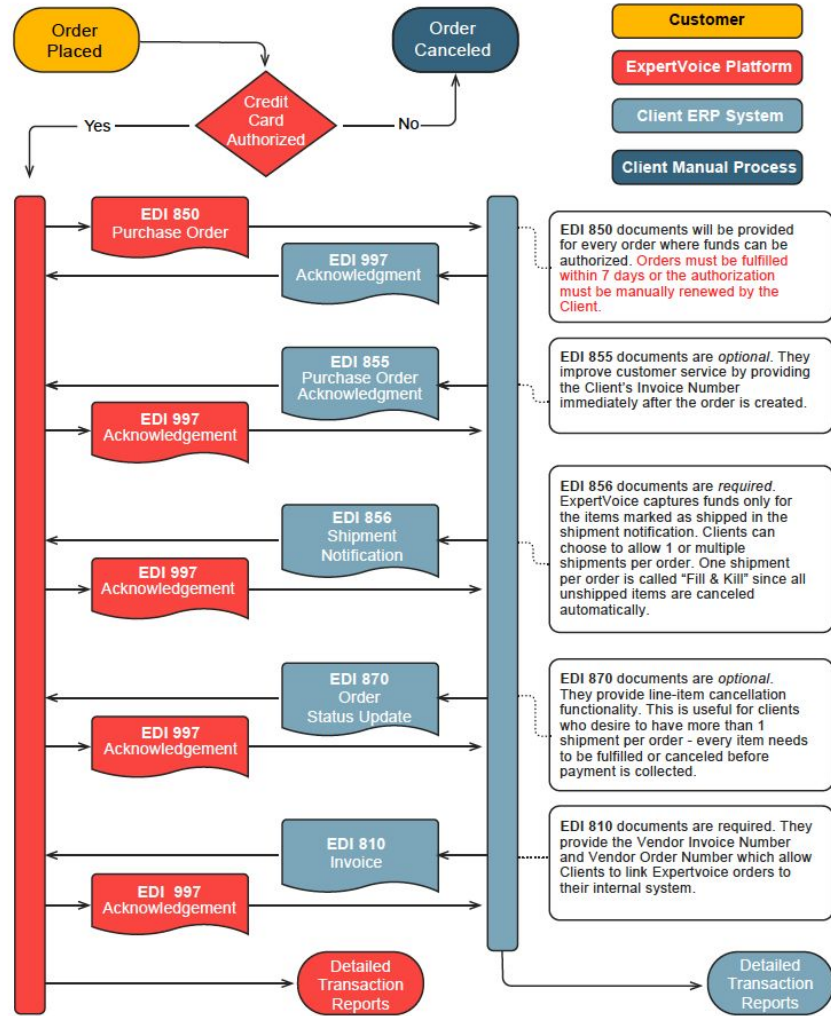
EDI Review

Key Terms

- 850** | PO or Purchase Order
- 997** | Acknowledgment
- 856** | ASN or Advanced Ship Notice
- 810** | Invoice



Workflow



Purchase Orders

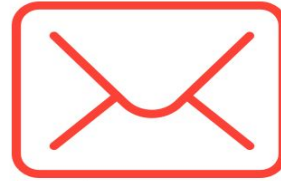


NOTE: Once the 850 Purchase Order(s) is generated, the credit card is authorized and orders ***must be shipped within 168 hours (7-days)!***

Once a member purchases an item on the ExpertVoice platform, we generate an 850 Purchase Order



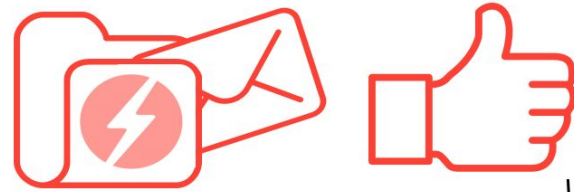
Delivery



The 850 Purchase Order is sent to the brand, who will then pull and process the order for fulfillment



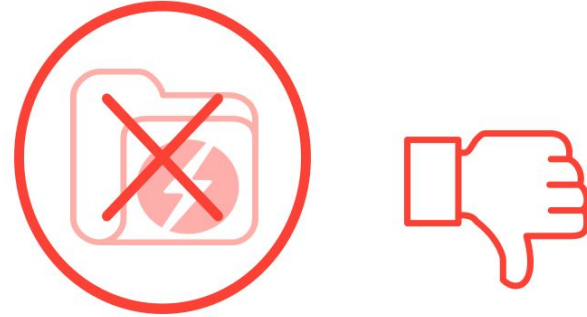
Acknowledgment



When the Brand successfully pulls an 850 Purchase Order, a 997 Order Acknowledgment is sent back to ExpertVoice to let us know the order information was received.



Unacknowledged

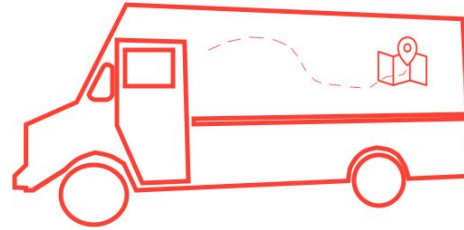


If ExpertVoice does not receive a 997 Order Acknowledgement from the brand, this means the brand did not receive the 850 Purchase Order.

Our team regularly monitors EDI orders and will contact the Order Fulfillment Manager to notify them of the unacknowledged orders.



Shipping



After the brand processes the order and the item ships. An 856 Advanced Ship Notice (ASN), as well as an 810 Invoice will be generated back to ExpertVoice.



NOTE: Once the 850 Purchase Order is generated, the credit card is authorized and orders ***must be shipped within 168 hours (7-days)!***



Capturing \$\$\$



The brand remits the 856 (ASN) and 810 (Invoice) back to Expertvoice.

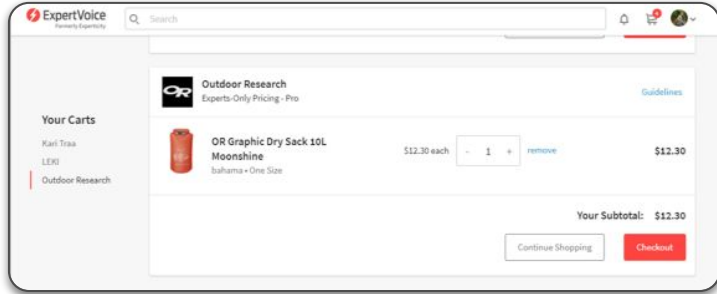
- The 856 (ASN) contains the shipment tracking number and also triggers payment capture in the Expertvoice system.
- The 810 (Invoice) contains the brands invoice information related to the Expertvoice order and is used to reconcile financial reports.



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.



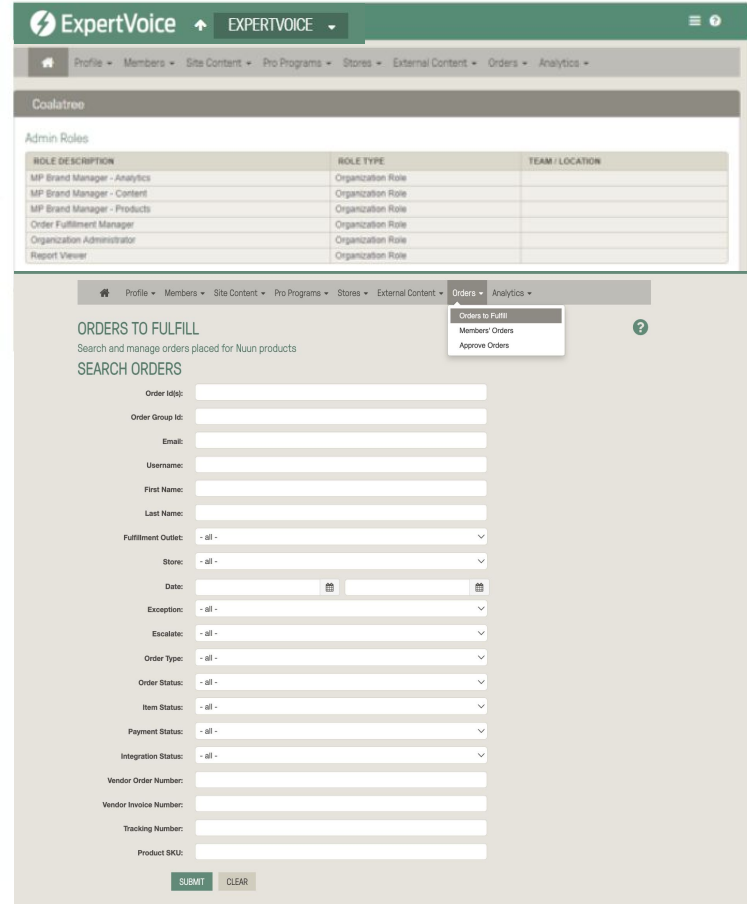

3. Brand processes orders

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

5. Customer leaves awesome review



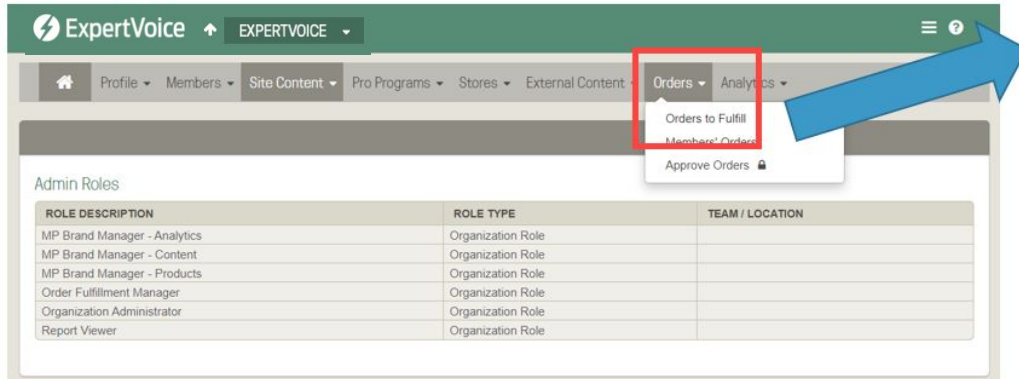
“Admin”



Navigating Admin

Admin Home Screen Drop Downs

You will spend most of your time in “**Orders**”



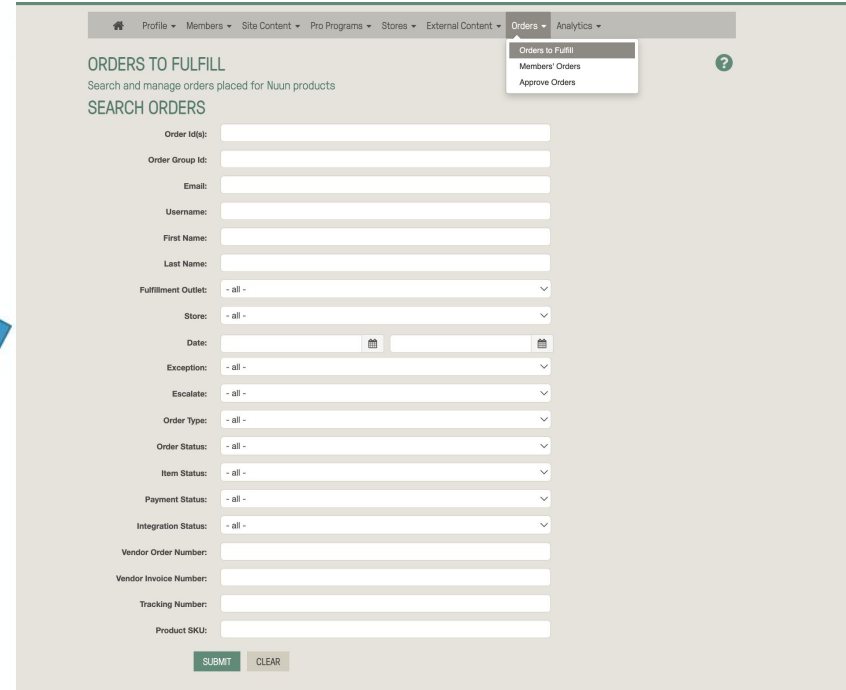
ExpertVoice EXPERTVOICE

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

Orders to Fulfill
Members' Orders
Approve Orders

Admin Roles

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	



ORDERS TO FULFILL

Search and manage orders placed for Nuun products

SEARCH ORDERS

Order Id(j):

Order Group Id:

Email:

Username:

First Name:

Last Name:

Fulfillment Outlet:

Store:

Date:

Exception:

Escalate:

Order Type:

Order Status:

Item Status:

Payment Status:

Integration Status:

Vendor Order Number:

Vendor Invoice Number:

Tracking Number:

Product SKU:

SUBMIT CLEAR

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



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.

The screenshot displays the 'ORDER SUMMARY' page in the ExpertVoice admin interface. At the top, there's a navigation bar with 'Organizations', 'Members', 'Site Content', 'External Content', 'Orders', 'Reports', 'Preferences', 'Marketing', and 'Integration'. Below this is a 'BACK' button and navigation arrows. The main section is titled 'ORDER SUMMARY' and contains an 'Order Information' card with various fields like Order Id, Order Date, Status, and Shipping Method. A red box highlights a row of action buttons: 'Edit', 'Renew Authorization', 'Ship', 'Finalize', and 'Cancel'. Below the order information is a table for 'FULFILLMENT ORDER GROUP' with columns for Group ID, Date Created, Date Completed, Status, Shipping Method, Payment Status, Integration Status, Expiration Date, PO Number, Subtotal, Shipping, Sales Tax, Transaction Fee, and Total. The bottom section shows 'PAYMENT TRANSACTIONS' and 'STATUS HISTORY'.

PRODUCT CODE	SKU / UPC	DESCRIPTION	MSRP	WHOLESALE	UNIT	QTY	EXTENDED
Not Shipped							
110268	11028810003.115 190340380976	Ghost 11 Color: Ebony/Grey/Silver Size: 11.5 Width: Reg	120.00	66.00	90.00	1	90.00

UPDATED	UPDATED BY	STATUS	COMMENT
03/26/2019 04:16:55 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 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	
Order Date 03/26/2019	Currency USD	
Status Processing		
Sold By Experticy		
Shipped By		Shipping Method
Name		Description Ground
Email		Carrier FedEx Ground
		Service Ground
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

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 10:50:06 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.

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

When in doubt, contact your CS partner!



Navigating Admin

Only If Shipping Across Deals is enabled

From the Order Summary Screen, some orders may have a “**Related Orders**” section.

ExpertVoice’s *Shipping Across Deals* feature allows orders made across multiple deals or stores from your brand to be combined into one order, and therefore packaged and shipped as one shipment. This will reduce the expense of shipping by reducing the number of packages, as well as the time to pack and ship orders separately. Experts will only need to pay one shipping fee for these orders, making it even easier for them to order more products from your brand.

Click on Dropdown to see orders from the same Expert that can be shipped with a combined shipment. When possible strive to process and ship these related orders together.

When in doubt, contact your CS partner!

ORDER SUMMARY

Order Information

Change Payment | Comment | Set Exception | Adjustment | Escalate to Finance | Print

GENERAL

Order Id: 7791647 | Fulfillment Outlet: US | Currency: USD

Status: Processed

Sold By: Experticity

Shipped By: Garmin

Name: **Abimed Center**

Email: **[REDACTED]**

Order Type: Retail EPP

Store: Experts-Only Pricing - Standard

Guidelines Version: 43909

Buyer: Recreational Equipment Inc - REI

Location: DC - Washington

Team: Recreational Equipment Inc - REI Retail Employees

Profile Name: Retail EPP

Commission: 8.0% of Merchandise

PAYMENT

Payment Method: PayPal

Payment Service Fee: N/A

SHIPPING ADDRESS

Abimed Center, College Park, MD 20740, US

Shipping Method: Free Shipping

Carrier: FedEx Ground

Service: Ground

Shipping Shown: \$0.00 USD

Integration: Automatic garmin

Transaction Fee: 1.5% of Merchandise [\$5.00 Max]

Drop files here to upload

FULFILLMENT ORDER GROUP

Edit | Return

Group ID	Date Created	Date Completed	Status	Shipping Method	Payment Status	Integration Status	Vendor Invoice #	PO Number	Subtotal	Shipping	Transaction Fee	Coupon Applied	Sales Tax - MD	Total	
17788138	08/09/2024	08/09/2024	Processed	Free Shipping	Charged	Shipped	242028543	7791647G:17788138	\$129.99 USD	--	\$1.95 USD	\$0.00 USD	\$7.80 USD	\$139.74 USD	
										Payment	\$139.74 USD				
										Payment Fee	--				
										Commission **	\$10.40 USD				
										Due Vendor	\$119.59 USD				
** 8.0% of Merchandise															

PRODUCT CODE	SKU UPC	DESCRIPTION	MSRP	WHOLESALE	UNIT	QTY	EXTENDED
Shipment #1 08/09/2024 Edit Tracking # 1Z66527X03348471190							
010-02562-00	010-02562-00 753759279608	Forerunner® 55 Black Wrist Size: 126-203 mm	199.99	199.99	129.99	1	129.99

Transactions and History

Related Orders

ORDER ID	MANUFACTURER	ORDER STATUS	TRANSACTION AMOUNT
7791648	Garmin	PROCESSED	193.49



How to Renew an Expired Credit Card Authorization

How to Renew an Expired Credit Card Authorization

Follow these steps

1. Orders to reauthorize:

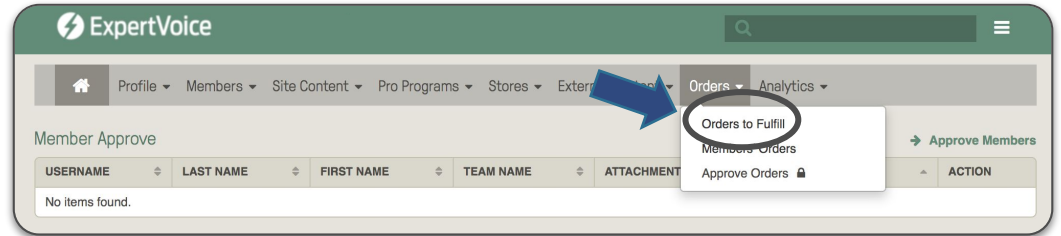
The **Daily Order Email** will identify which orders have expired authorizations and need to be renewed.

***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**



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

The screenshot displays the ExpertVoice interface. At the top, there's a navigation bar with 'ExpertVoice' and 'EXPERTVOICE' dropdown. Below it, a menu bar includes 'Organizations', 'Members', 'Site Content', 'External Content', 'Orders', 'Reports', 'Preferences', 'Marketing', and 'Integration'. The main content area is titled 'ORDER SUMMARY' and shows 'Order Information' with various tabs like 'Process', 'Cancel', 'Change Payment', 'Comment', 'Set Exception', 'Tax Profile', 'Adjustment', and 'Escalate to Finance'. The 'GENERAL' section lists order details such as Order Id (4535821), Order Date (03/20/2019), Status (Processing), and Sold By (Experticity). The 'FULFILLMENT ORDER GROUP' section is highlighted, showing a 'Renew Authorization' button circled in red. A blue arrow points from this button to the 'RENEW AUTHORIZATION ORDER ACTION' modal window. This modal window prompts the user to confirm the new authorization amount and payment method, with fields for Name (KEVIN R WATSON), Credit Card, and Amount. A note states: '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.' At the bottom of the modal are 'AUTHORIZE' and 'CANCEL' buttons.

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

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

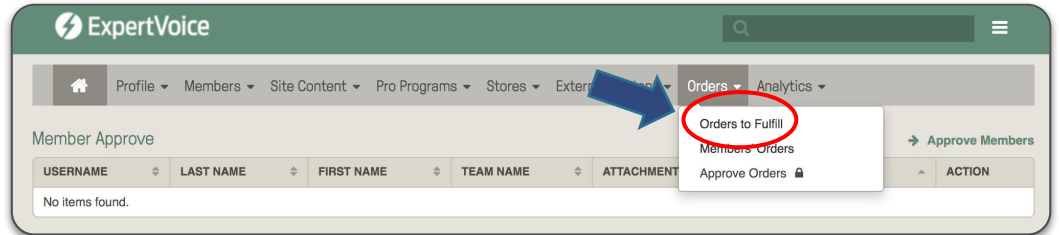
Follow these steps

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**



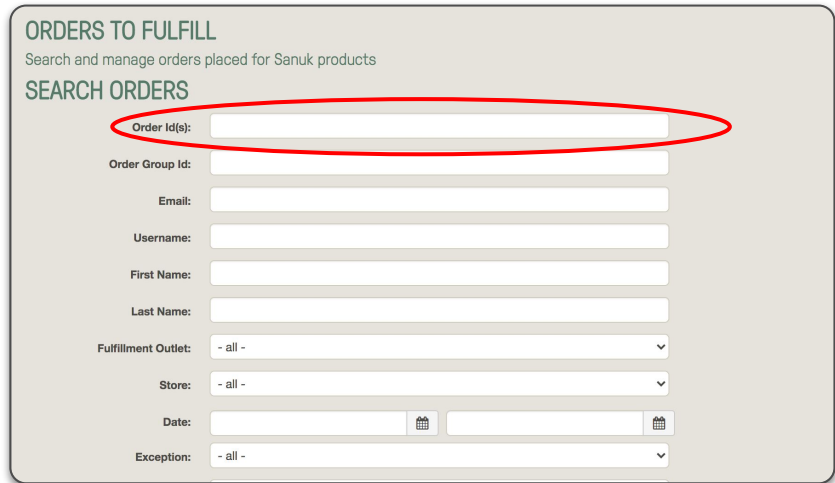
ExpertVoice

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

Member Approve → Approve Members

USERNAME	LAST NAME	FIRST NAME	TEAM NAME	ATTACHMENT	ACTION
No items found.					

Orders to Fulfill
Members Orders
Approve Orders



ORDERS TO FULFILL

Search and manage orders placed for Sanuk products

SEARCH ORDERS

Order Id(s):

Order Group Id:

Email:

Username:

First Name:

Last Name:

Fulfillment Outlet:

Store:

Date:

Exception:



Orders

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 & 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

The image shows two screenshots of the ExpertVoice web application. The top screenshot is the 'ORDER SUMMARY' page for Order 4 of 500. It features a navigation bar with 'Orders' selected and a toolbar with buttons for 'Process', 'Cancel', 'Change Payment', 'Comment', 'Set Exception', 'Tax Profile', 'Adjustment', and 'Escalate to Finance'. Below the toolbar are tabs for 'GENERAL', 'PAYMENT', and 'SHIPPING ADDRESS'. The 'GENERAL' tab is active, displaying order details such as Order ID (4535821), Order Date (03/20/2019), Status (Processing), and Shipped By (Experticity). A blue arrow points to the 'Cancel' button in the 'FULFILLMENT ORDER GROUP' section. The bottom screenshot is the 'CANCEL GROUP ORDER ACTION' page. It prompts the user to 'Please select the items to cancel:' and shows a table with columns for 'Select Items', 'CancelQty', and 'Description'. The 'CancelQty' field is set to '1' and circled in red. Below the table, there are radio button options for 'Cancel Items' (selected) and 'Move back to unprocessed'. There are also checkboxes for 'Make note public' (checked) and 'Email Member' (unchecked). A 'SUBMIT' button is at the bottom, also circled in red. Blue arrows point from the text on the left to these specific UI elements.





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.

ExpertVoice

Profile Members Site Content Pro Programs Stores External Content Orders Analytics

BACK | Prev Order 1 of 1 Next

ORDER SUMMARY

Order Information

Change Payment Comment Set Exception Escalate to Finance Print

GENERAL		SHIPPING ADDRESS	
Order Id	Fulfillment Outlet	US	John Doe
Order Date 03/08/2019	Currency	USD	123 Main St.
Status Processed			Seattle, WA 11111
Sold By Experticy			
Shipped By	Name	John Doe	Shipping Method
	Email	John.doe@gmail.com	Description Free Shipping Over \$50 (Lower 48)
Order Type ProMotive	Store	Experts-Only Pricing - Pro	
	Team	Coalraee Employees	

Order Summary

Group ID

Date Created 03/12/2019

Date Completed 03/15/2019

Status Processed

Shipping Method Free Shipping Over \$50 (Lower 48)

Payment Status Charged

Integration Status Submitted

PO Number 4513496C

PRODUCT CODE	SKU / UPC	DESCRIPTION
GRANDVIEW_KACHULA	GRANDVIEW_KACHULA	KACHULA Color: Grandview

Transactions and History

ExpertVoice EXPERTVOICE

Organizations Members Site Content External Content Orders Reports Preferences Marketing Integration

[Back to Order Summary]

RETURN ORDER

The following items will be returned

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

Return Comment:

Make note public:

SUBMIT

