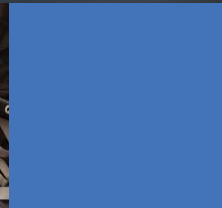


# Order Processing



# Order Processing

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

# **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:

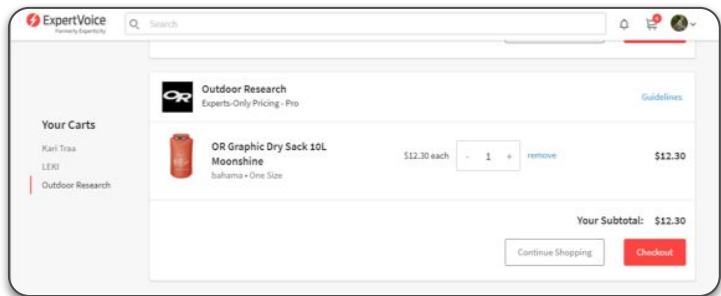
- Monitor orders via the Daily Order Summary email
- How often an OFM should be coming into the ExpertVoice admin to process orders is dependent on order volume. We recommend going in at least a couple times a week, but for high volume brands, orders should be processed on a daily basis. All orders should 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.



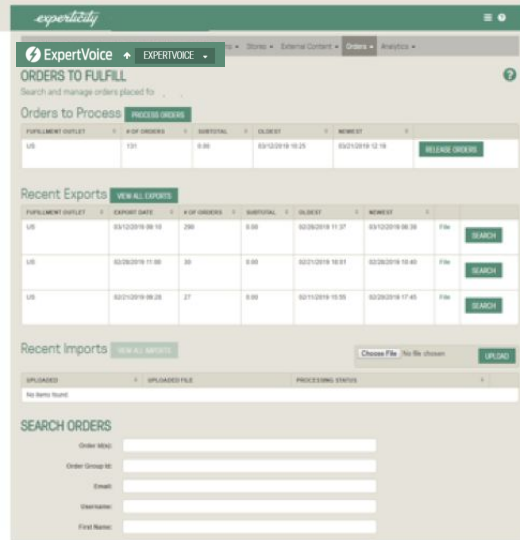
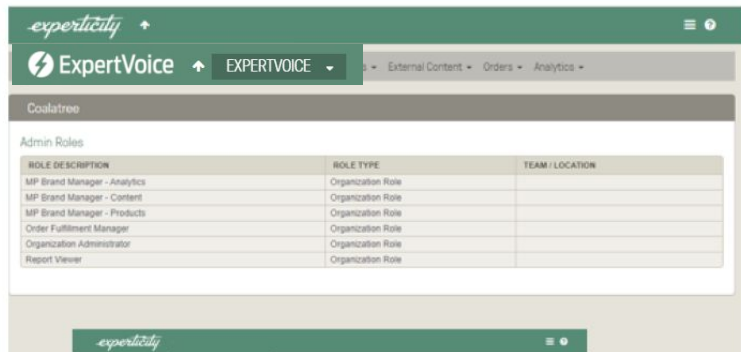

## 3. Brand processes orders

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

## 5. Customer leaves awesome review



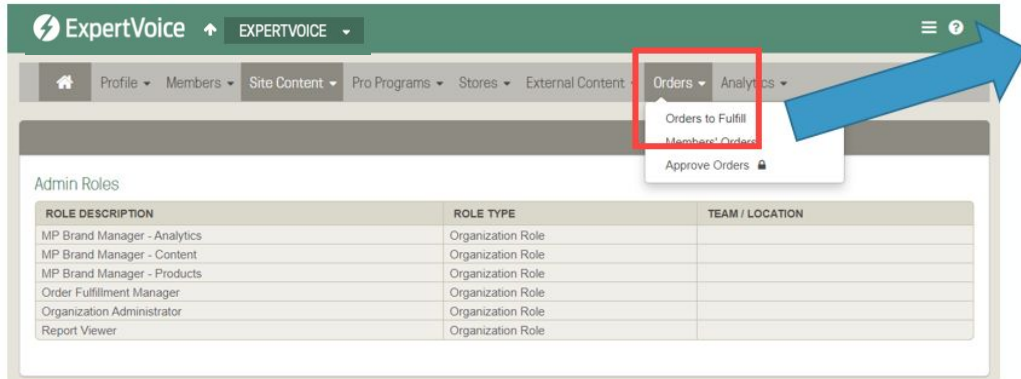
“Admin”



# Navigating Admin

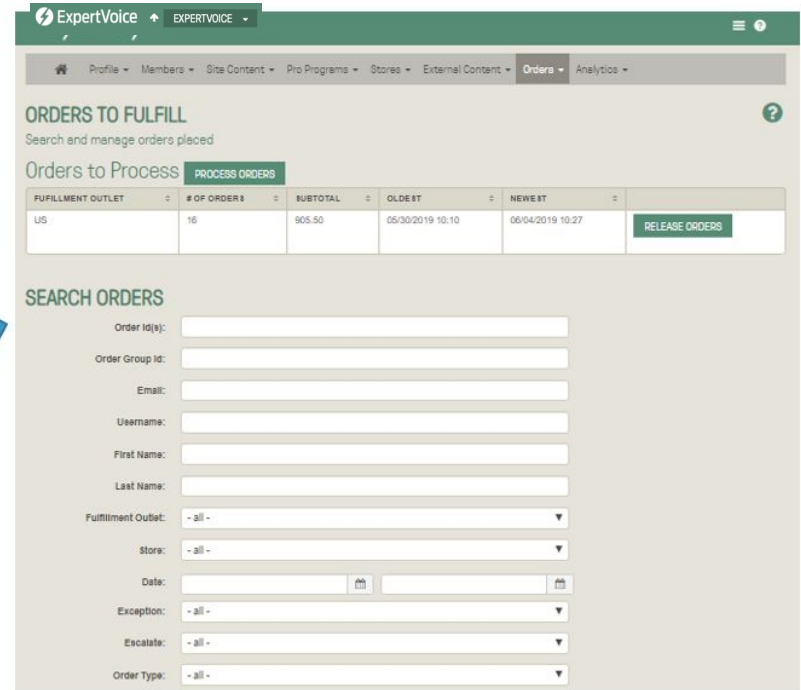
## Admin Home Screen Drop Downs

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



The screenshot shows the ExpertVoice Admin Home Screen. The navigation menu 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 points to the 'Orders to Fulfill' option. Below the navigation menu is the 'Admin Roles' section, which contains a table 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 features 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	<a href="#">RELEASE ORDERS</a>

Below the table is the 'SEARCH ORDERS' section, which includes the following search filters:

- 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



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 Tax Profile Adjustment Escalate to Finance

Print

GENERAL	PAYMENT	SHIPPING ADDRESS
Order Id Order Date Status Sold By Shipped By Name Email Order Type Store Vendor Program ID Team	Payment Authorize Payment Service Fee N/A	Shipping Method Description Carrier Service
Profile Name Commission	Integration Transaction Fee	Ground FedEx Ground Ground
Broform 12.5% of Merchandise	Automatic 0.0% of Merchandise (\$2.00 Min)	

U.S. Army - Military  |  |

Group ID 9147225  
Date Created 03/26/2019  
Date Completed  
Status Processing  
Shipping Method Ground

Payment Status Authorized  
Integration Status Submitted  
Expiration Date 04/02/2019  
PO Number 4547877G9147225 KBak

PRODUCT CODE	SKU / UPC	DESCRIPTION	MSRP	WHOLESALE	UNIT	QTY	EXTENDED
Not Shipped							
110268	11028910903.115 190340380976	Ghost 11 Color: Ebony/Grey/Silver Size: 11.5 Width: Reg	120.00	66.00	90.00	1	90.00

Subtotal \$90.00 USD  
Shipping \$8.95 USD  
Sales Tax - KS 8.95% \$8.68 USD  
Transaction Fee \$2.00 USD  
Total \$107.63 USD

Transactions and History

#### PAYMENT TRANSACTIONS

Card Type	Last 4 Digits	Exp	Auth	Cvc	Txn#
Visa	Last 4 Digits:1380	Exp: 11/2021	Ave: B Authorization	Cvc: Approved	Txn#: 35C3AA4A288...
	03/26/2019 04:16 PM MDT		Void	Approved	\$1.00 USD
Visa	Last 4 Digits:1380	Exp: 11/2021	Ave: B Authorization	Cvc: Approved	Txn#: 35C3AA50277...
	03/26/2019 04:17 PM MDT				\$107.63 USD

#### STATUS HISTORY

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: [Redacted]

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 [Redacted]

Payment Service Fee: N/A

**SHIPPING ADDRESS**

Address: [Redacted]

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



# Processing Orders 101

Integration Lite Export + Import

# Processing Orders 101

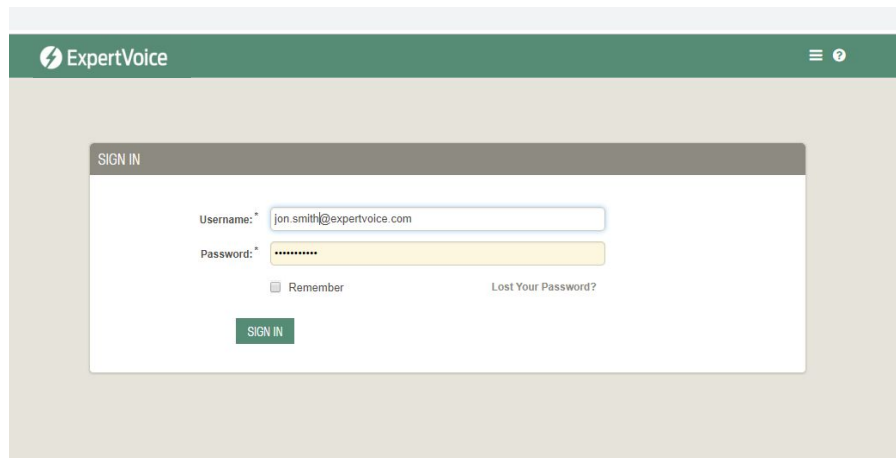
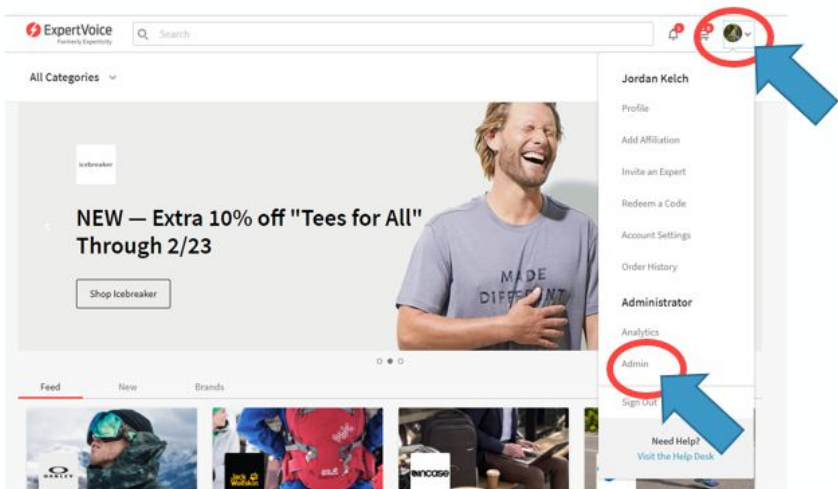
Follow these steps

## 1. Login:

expertvoice.com

OR

admin.expertvoice.com



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

**Pro Tip:** Bookmark the Admin page in your web browser

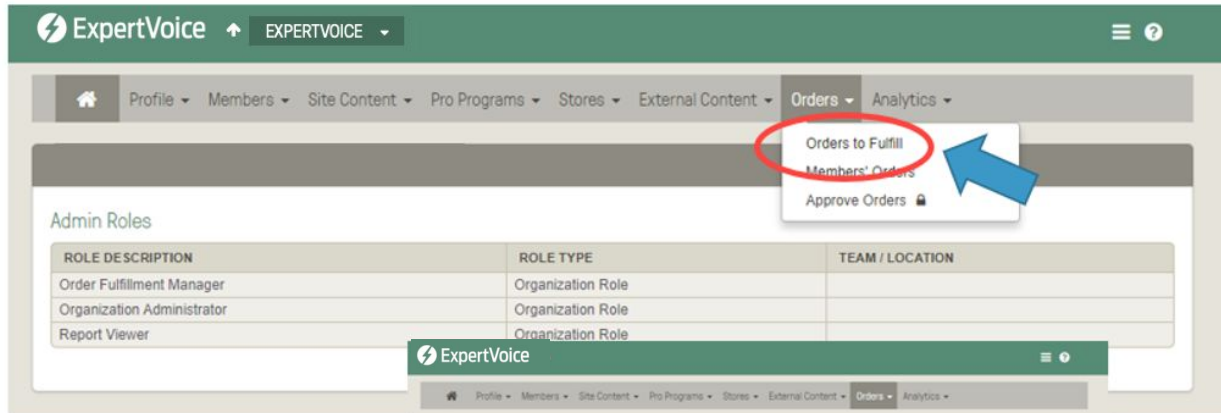


# Processing Orders 101

Follow these steps

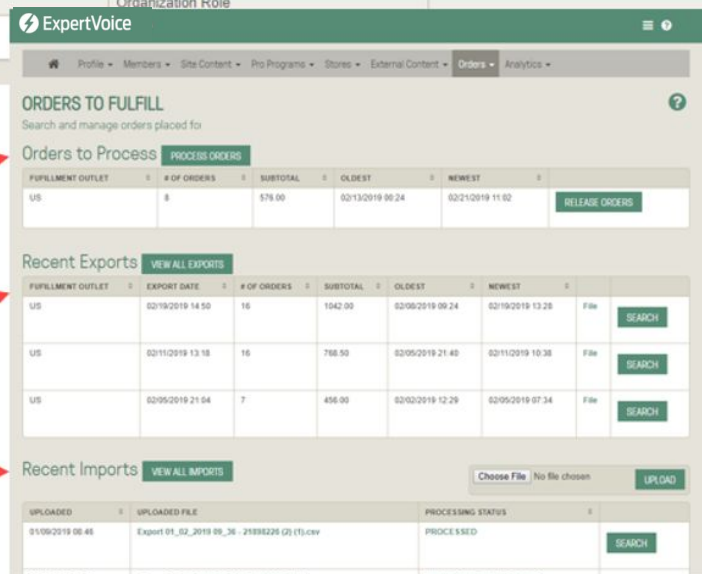
## 2. Orders to Fulfill:

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



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”)
- **Recent Imports** are previously uploaded order imports that have been completed



# Processing Orders 101

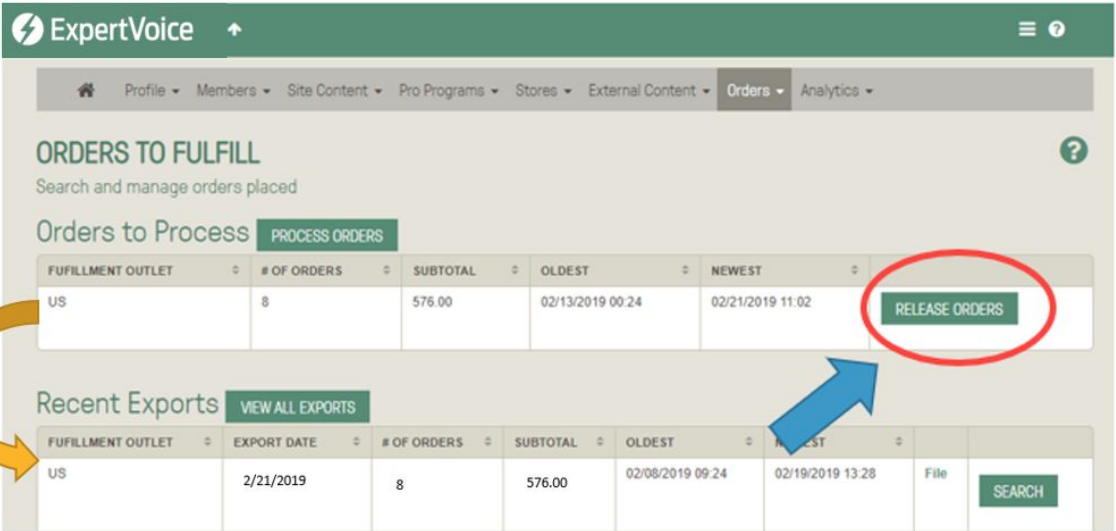
Follow these steps

## 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. If CC declines, then the order will not be exported. The expert will be notified and given 2 days to update payment before the order is cancelled.

**Note:** Click the **View All Exports** button to see archived export batch files.



The screenshot shows the ExpertVoice interface for 'ORDERS TO FULFILL'. The 'Orders to Process' section is highlighted with a yellow arrow pointing to the 'RELEASE ORDERS' button, which is circled in red. A blue arrow points from the 'RELEASE ORDERS' button to the 'Recent Exports' section. The 'Recent Exports' section shows a table with columns for Fulfillment Outlet, Export Date, # of Orders, Subtotal, Oldest, and Newest.

FULLFILLMENT OUTLET	# OF ORDERS	SUBTOTAL	OLDEST	NEWEST
US	8	576.00	02/13/2019 00:24	02/21/2019 11:02

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

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



# 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 to open the file

**\*Note:** It can take up to 15 minutes to process. Refresh screen.

This creates an Excel.csv export batch that includes the following info:

- Order ID
- Primary Order ID (if the expert placed an order from multiple deal types, this links the orders together)
- Order Date
- Member Name
- Shipping info
- SKU & UPC
- QTY Ordered
- Product Description, etc.

The screenshot shows a web application interface for managing orders. At the top, there are navigation tabs: Profile, Members, Site Content, Pro Programs, Stores, External Content, Orders, and Analytics. The main heading is 'ORDERS TO FULFILL' with a search and manage prompt for SCARPA products. Below this, there are two main sections: 'Orders to Process' and 'Recent Exports'. The 'Orders to Process' section has a 'PROCESS ORDERS' button and a table with columns: FULFILLMENT OUTLET, # OF ORDERS, SUBTOTAL, OLDEST, and NEWEST. The 'Recent Exports' section has a 'VIEW ALL EXPORTS' button and a table with columns: FULFILLMENT OUTLET, EXPORT DATE, # OF ORDERS, SUBTOTAL, OLDEST, NEWEST, and File. A red arrow points to the 'File' button in the 'Recent Exports' table. Below the 'Recent Exports' table is a 'Recent Imports' section with a 'VIEW ALL IMPORTS' button and a file upload area with a 'Choose File' button and an 'UPLOAD' button.

Order Export Example:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	
Order Id	Primary Order Id	Order Date	Member First	Member Last	SHIP TO ADDRESSEE	Ship To Attention	Shipping Address 1	Shipping Ad	Shipping City	Shipping State /	Shipping Postal	Shippr	Shipping Phone	SKU	UPC	QTY	Description	Cost of Item	Shipping Cost	SHIPPING METH	
6818660	6818660	1/23/23	Roheem	Roten	The Gravity Vault	Attn: Roheem Roten	175 King of Prussia Road		Radnor	PA	19087	US	123456789000	70077/000-BLK-38.5		1	MAGO	107.48	20	Subtotal Tiered Shi	
6818661		1/23/23	Roheem	Roten	The Gravity Vault	Attn: Roheem Roten	175 King of Prussia Road		Radnor	PA	19087	US	123456789000	70074/000-SMKYEL-39		1	VAPOR MEN'	100.28	20	Subtotal Tiered Shi	
6818717		1/23/23	Jessi	Watson	Christy Sports	Attn: Jessi Watson (1	1835 Central Park Plaza		Steamboat Spr	CO	80487	US	123456789000	12051/501-WHTBLKAZR-25.5		1	MAESTRALE I	448.8	25	Subtotal Tiered Shi	
6818812		1/23/23	Anisa	Daher	Anisa C Daher		16744 Burke Ave N		SHORELINE WA	WA	98133	US	123456789000	12300/530-BLK-08.5		1	INVERSTRAL	268.29	20	Subtotal Tiered Shi	
6818819		1/23/23	Zachary	Alexakis	Zachary Alexakis		439 Mt Hood Dr			99587	AK	99587	US	123456789000	88004-BRNZ-44		1	FUEGO	268.29	20	Subtotal Tiered Shi
6819452	6819452	1/23/23	Ryan	Benson	Ryan Benson		101A Keewenaw Dr		Whitehorse	YT	Y1A 0B5	CA	123456789000	87520/201-TON-44		1	MONT BLANC	478.43	42.5	Canada Shipping	
6819453		1/23/23	Ryan	Benson	Ryan Benson		101A Keewenaw Dr		Whitehorse	YT	Y1A 0B5	CA	123456789000	87520/201-TON-43.5		1	MONT BLANC	478.43	42.5	Canada Shipping	
6819655		1/23/23	Emanuel	Mendiola	Emanuel Mendiola		270 E Flatiron Crossing Dr		Broomfield	CO	80021	US	123456789000	70062/000-COVBLK-42		1	ORIGIN MEN'	76.54	15	Subtotal Tiered Shi	
6819710		1/24/23	Matthew	Cowperthwaite	Matthew		18840 NW Rock Creek Apt 282		Portland	OR	97229	US	123456789000	70018/001-MANPAP-42		1	FORCE V	105.82	15	Subtotal Tiered Shi	





# Processing Orders 101

Follow these steps

## 5. Import Orders:

To import, the following info is required:

- **Order ID**
- **SKU**
- **Quantity Shipped**
- **Tracking Number** (use N/A if no tracking)
- **Vendor Invoice Number** (Not required, but helpful for finance teams processing remittance)

Then save file as .csv

**Note:** The import file **must include** the headers shown in top screenshot and the header names must be exact.

From the Orders to Fulfill screen, in the **Recent Imports** section, click “**Choose File**” on the right side and “**Upload**” the completed order Excel.csv doc

**Note:** Click the **View All Imports** button to see archived import batch files.

	A	B	C	D	E
1	Order Id	SKU	QTY	tracking number	vendor invoice number
2	123456	XXXXX	1		
3	123456	XXXXX	1		
4	123456	XXXXX	1		
5	789101	XXXXX	1		
6	789101	XXXXX	1		

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

### ORDERS TO FULFILL

Search and manage orders placed for [BRAND X] products

Orders to Process **PROCESS ORDERS**

FULFILLMENT OUTLET	# OF ORDERS	SUBTOTAL	OLDEST	NEWEST	
US	5	179.70	03/04/2020 18:43	03/06/2020 00:05	<b>RELEASE ORDERS</b>

Recent Exports **VIEW ALL EXPORTS**

FULFILLMENT OUTLET	EXPORT DATE	# OF ORDERS	SUBTOTAL	OLDEST	NEWEST	File	
US	03/04/2020 14:18	4	161.73	03/02/2020 18:51	03/04/2020 12:14	File	<b>SEARCH</b>
US	03/02/2020 13:20	6	341.43	02/28/2020 23:58	03/01/2020 13:33	File	<b>SEARCH</b>
US	02/28/2020 11:34	6	233.61	02/28/2020 21:31	02/28/2020 07:09	File	<b>SEARCH</b>

Recent Imports **VIEW ALL IMPORTS**

Choose File | no file selected

**UPLOAD**

UPLOADED	UPLOADED FILE	PROCESSING STATUS	
03/04/2020 18:24	Expert Voice Tracking Upload - 030420.csv	PROCESSED	<b>SEARCH</b>
03/02/2020 17:23	Expert Voice Tracking Upload - 030320.csv	PROCESSED	<b>SEARCH</b>
02/28/2020 16:54	Expert Voice Tracking Upload - 022820.csv	PROCESSED	<b>SEARCH</b>
02/26/2020 15:34	Expert Voice Tracking Upload - 022620.csv	PROCESSED	<b>SEARCH</b>
02/24/2020 16:32	Expert Voice Tracking Upload - 022420.csv	PROCESSED	<b>SEARCH</b>

# Processing Orders 101

Follow these steps

## 6. Imported Orders:

The new order batch will appear in the **Recent Imports** section. The **Processing Status** column will show the status of the order import.

- **PROCESSED** = Successful order import complete! You're all done!
- **PROCESSED\_WITH\_ERRORS** = Processed but there may be errors with some orders
- **Click** on "**PROCESSED\_WITH\_ERRORS**" to address the errors

**NOTE:** If an order batch import is processed with errors, all orders in that import with errors are automatically marked as an exception and the order fulfillment manager needs to manually remove the exception before uploading corrected file!

ExpertVoice

Search and manage orders placed for

### Orders to Process

PROCESS ORDERS

FUFILLMENT OUTLET	# OF ORDERS	SUBTOTAL	OLDEST	NEWEST
No items found.				

### Recent Exports

VIEW ALL EXPORTS

FUFILLMENT OUTLET	EXPORT DATE	# OF ORDERS	SUBTOTAL	OLDEST	NEWEST	File
US	03/20/2019 08:52	11	869.50	03/15/2019 16:37	03/20/2019 07:56	File <a href="#">SEARCH</a>
US	03/15/2019 14:18	12	661.00	03/12/2019 13:15	03/15/2019 00:45	File <a href="#">SEARCH</a>
US	03/12/2019 12:46	26	1542.50	03/04/2019 16:57	03/11/2019 22:11	File <a href="#">SEARCH</a>

### Recent Imports

VIEW ALL IMPORTS

Choose File No file chosen [UPLOAD](#)

UPLOADED	UPLOADED FILE	PROCESSING STATUS
01/09/2019 08:46	Export 01_02_2019 09_36 - 21898226 (2) (1).csv	PROCESSED <a href="#">SEARCH</a>
01/08/2019 19:42	_Export 12_26_2018 13_12 - 21836275 (1) (1).csv	PROCESSED_WITH_ERRORS <a href="#">SEARCH</a>
12/19/2018 11:50	Export 12_17_2018 - 21748214 (1).csv	PROCESSED <a href="#">SEARCH</a>
12/19/2018 11:49	Export 12_14_2018 - 21720431 (1).csv	PROCESSED <a href="#">SEARCH</a>
12/03/2018 16:32	EXPORT %0911%2F26%2F2018 - 21409878 (1).csv	PROCESSED <a href="#">SEARCH</a>

# Processing Orders 101

Follow these steps

## 7. PROCESSED\_WITH\_ERRORS:

Clicking on “PROCESSED\_WITH\_ERRORS” will take you to this screen.

Errors that occurred during order import are listed in the “**Document Processing Summary**” section

To address the orders with errors:

Click “**Back**”

Scroll down on the Orders to Fulfill screen

Use the **Search Orders** section to pull up the orders that need to be addressed (multiple orders can be searched)

The Orders will appear below Search Orders Section, then manually remove the exception

ExpertVoice

[ Back ]

\_EXPORT 12\_26\_2018 13\_12 - 21836275 (1) (1).CSV

Uploaded  
Jan 8, 2019

Processed  
Jan 9, 2019

Document Processing Summary

20 success, 2 failures

Line 1: Can only process orders that are in PROCESSING status. Order is Processed OrderId: 4396756 at line 1

Line 26: Can only process orders that are in PROCESSING status. Order is Processed OrderId: 4406769 at line 26

ExpertVoice

ORDERS TO FULFILL

Search and manage orders placed for Coalitree products

Orders to Process

Recent Exports

Recent Imports

SEARCH ORDERS

Order Id(s): 4396756 4396778 4396762 439222 439333

Order Group Id:

ORDER ID	DATE	ORDER TYPE	BUYING COMPANY	MEMBER	ORDER STATUS
4396756	12/17/2018	ProActive	Navy - Dept. of Defense	Eric Team	Processed



# Processing Orders 101

## Follow these steps

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



# **How to Renew an Expired Credit Card Authorization**

# How to Renew an Expired Credit Card Authorization

Follow these steps

## 1. Orders to reauthorize:

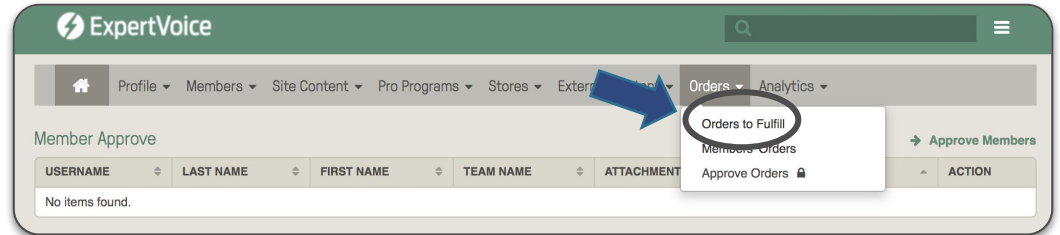
The **Daily Order Email** will identify which orders have expired authorizations and need to be renewed.

**\*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.

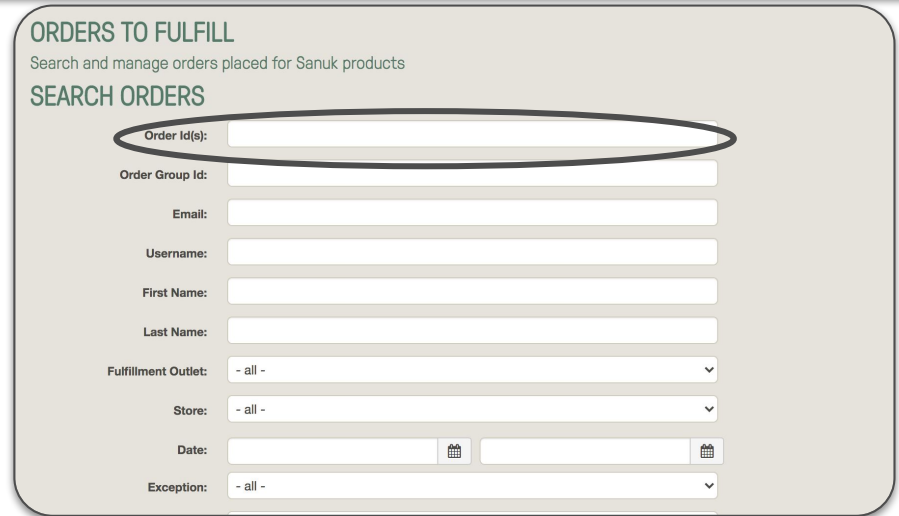
From the home screen, click the **“Orders”** dropdown, select **“Orders to Fulfill”**

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 ExpertVoice dashboard. The 'Orders' dropdown menu is open, and 'Orders to Fulfill' is circled in blue. A blue arrow points to the 'Orders' dropdown. Below the menu, there is a 'Member Approve' section with a table that currently has no items found.



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 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

The screenshot displays the ExpertVoice interface. The top navigation 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 'FULFILLMENT ORDER GROUP' section is visible, with a red circle around the 'Renew Authorization' button. A blue arrow points from this button to a modal window titled 'RENEW AUTHORIZATION ORDER ACTION'. The modal contains the following information:

- 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.

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

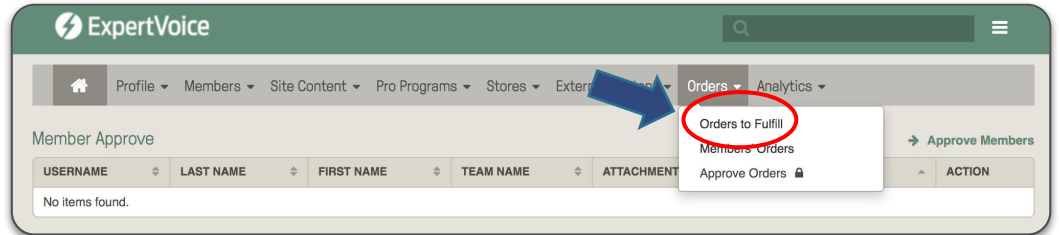
Follow these steps

## 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**



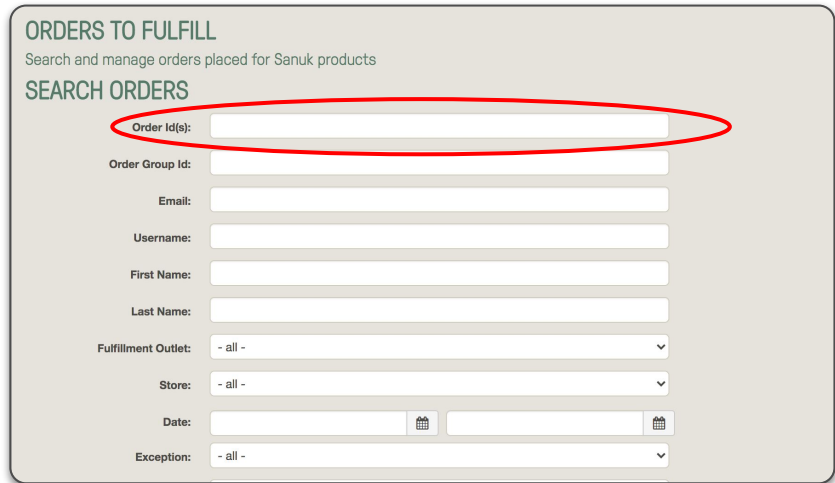
ExpertVoice

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 from the ExpertVoice system. The top screenshot is the 'ORDER SUMMARY' page for Order 4 of 500. It displays order details such as Order ID (4535821), Order Date (03/20/2019), Status (Processing), and Shipped By (Experticity). Below the order information, there are tabs for GENERAL, PAYMENT, and SHIPPING ADDRESS. A 'Cancel' button is circled in red in the bottom right of the GENERAL tab. A blue arrow points from this button to the 'Cancel' button in the 'CANCEL GROUP ORDER ACTION' form shown in the bottom screenshot.

The bottom screenshot is the 'CANCEL GROUP ORDER ACTION' form. It prompts the user to 'Please select the items to cancel:'. A table lists items for selection, with the first item 'Adrenaline GTS 19' selected. The 'CancelQty' is set to 1. Below the table, there are radio button options: 'Cancel Items' (selected), 'Move back to unprocessed', and 'Make note public' (checked). There is also an 'Email Member' checkbox which is unchecked. A 'SUBMIT' button is circled in red at the bottom. Blue arrows point from the 'Cancel Items' radio button and the 'SUBMIT' button to the corresponding steps in the text instructions.





# 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	

FULFILLMENT ORDER

Edit Return

Group ID	Date Created	Payment Status	Charged
	03/12/2019	Integration Status	Submitted
	03/15/2019	PO Number	4513496C
	Status	Processed	
	Shipping Method	Free Shipping Over \$50 (Lower 48)	

PRODUCT CODE	SKU / UPC	DESCRIPTION
Shipment #1 03/15/2019 Edit		
US Postal Service - Standard Service		
Tracking # 9261290203513001057451		
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**

# FAQs & Pro Tips

# Frequently Asked Questions

- **How long does it take to process an import?**
  - It takes up to 15 minutes to process in our system before showing a status of "processed, or processed w/ errors, etc."
- **What is the best cadence to import?**
  - Cadence isn't as important as making sure to fulfill/mark orders as shipped within the 7-day authorization window. Ask yourself...what is the optimal member experience for fulfillment? ASAP
- **If there are multiple items on an order and we are only shipping some of the items, when we import, will this cancel the remaining items automatically OR do they stay open?**
  - All imports are configured to use fill and kill – which means you get one shipment per order; anything not shipped is cancelled

## Pro Tips

- **The SKU must match *exactly* what is in the store file**
- **As needed, the Order Fulfillment Manager can still manually mark orders as shipped in the Admin, if lower volume (onesy/twoesy)**
- **When creating the import file, make a copy of the export file and delete irrelevant info. Then save file as csv. with a filename that is easy for you, as the OFM, to match up with the recent Export file**
- **What are the most common mistakes clients make with their import files?**
  - Not reviewing status of orders *before* importing – e.g. loading imports / trying to mark orders shipped that have already been marked shipped in our system
  - Putting a quantity of 0 on the import file. The file is *only* to be used to mark items shipped – do not include orders that have not shipped
  - Loading files with incorrect UPC or SKU – leading zeros can be a problem, or sometimes spaces are accidentally added.
- **The 7-day credit card authorization window begins once EXPORT is created.**
  - This is by far the most critical piece when onboarding new client / training them how to process orders.
- **Thoroughly read the entire error message if import status is “processed with errors” as it describes the problem clearly.**
- **The import will automatically attempt to reauthorize the credit card and capture payment at the time of the upload.**



