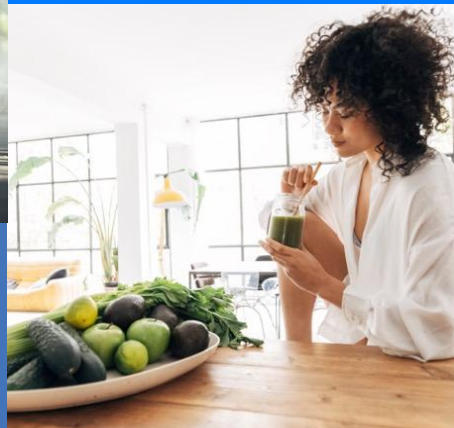
ExpertVoice

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

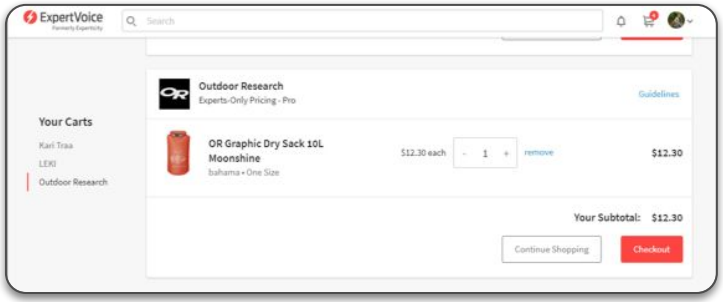
Best Practices:

- 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

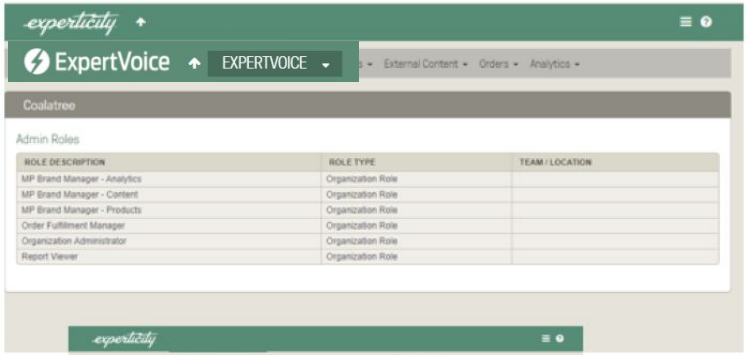
Admin Overview

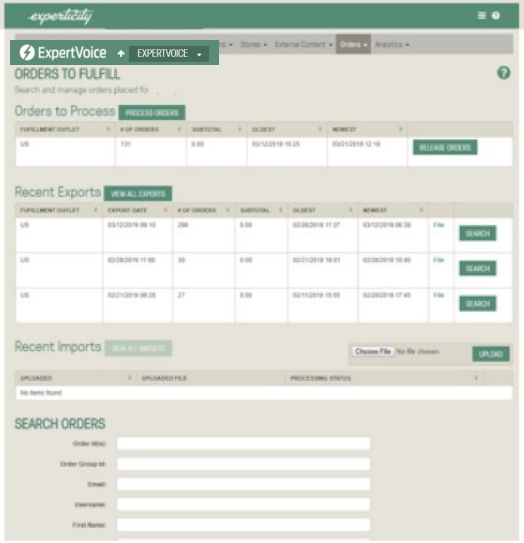
ExpertVoice Overview

1. Customers place orders on ExpertVoice.com



"Admin"





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

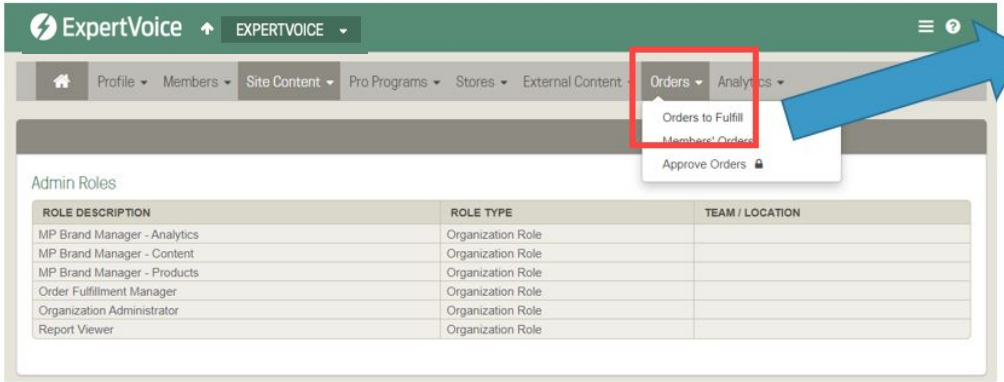
4. Order fulfillment manager captures payment and inputs tracking number in “Admin”

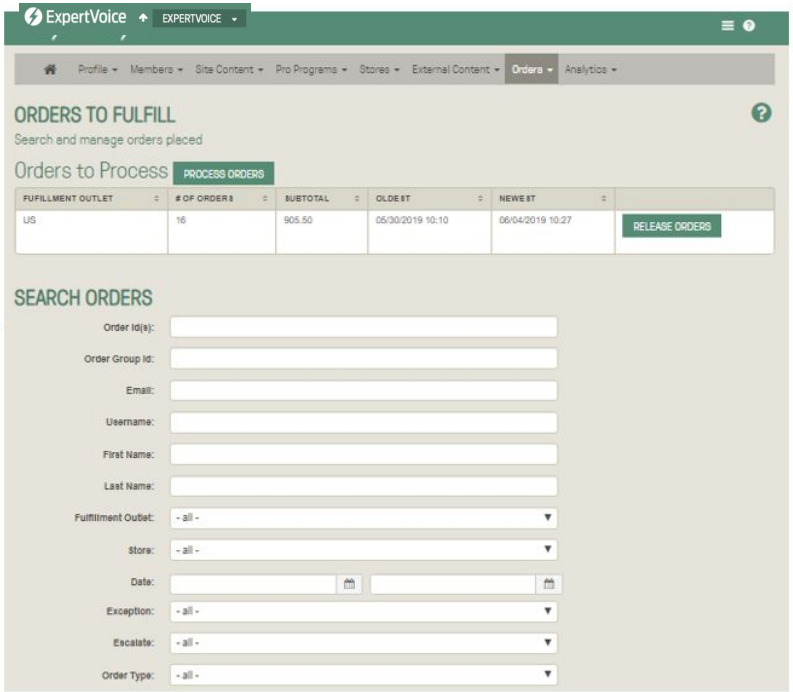
5. Customer leaves awesome review

Navigating Admin

Admin Home Screen Drop Downs

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





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

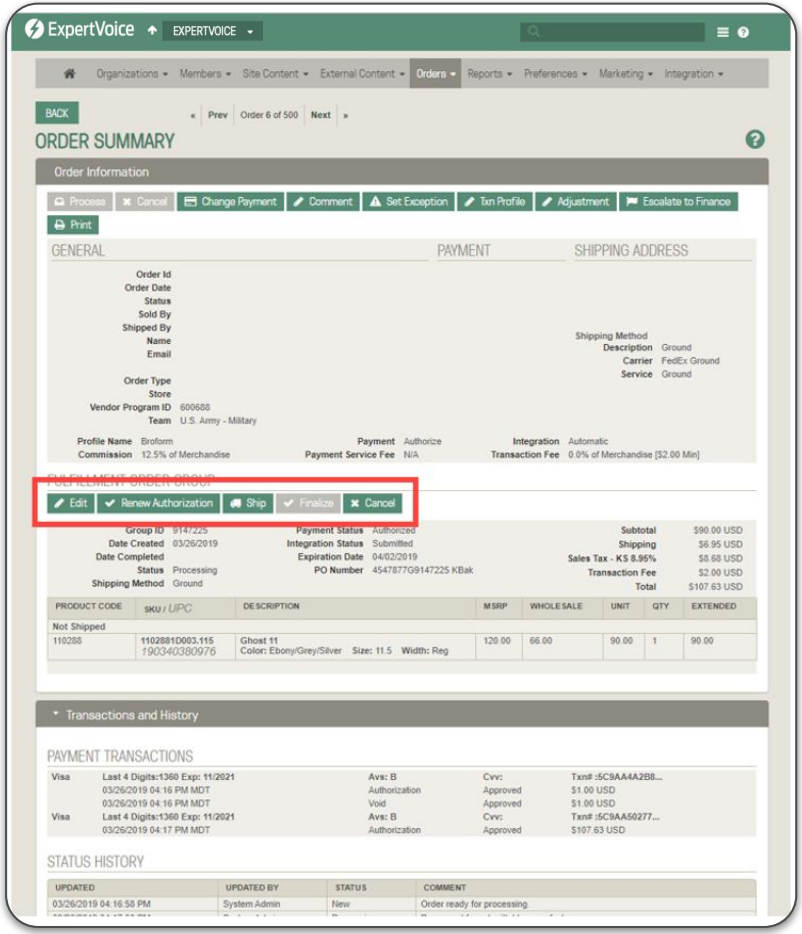
Click **Ship** to manually ship the order, this is where you will input the tracking number if applicable. More explanation to come.

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.



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.

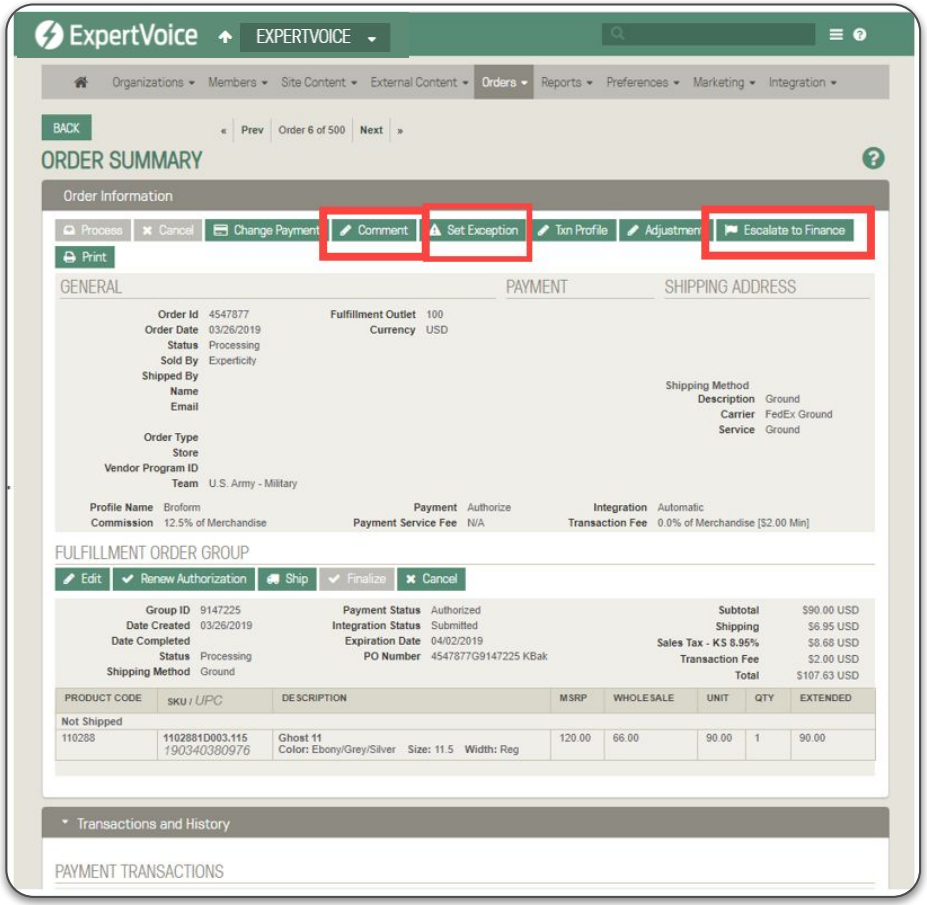
Escalate to Finance

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



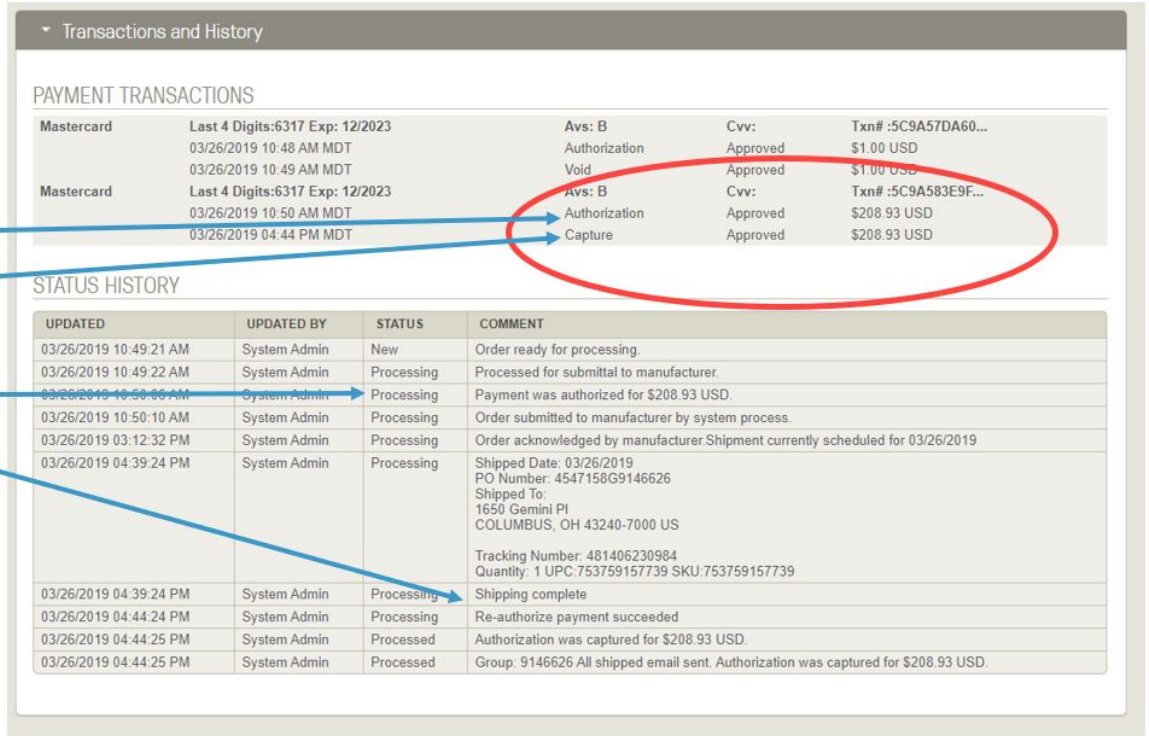
Navigating Admin

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

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

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

When in doubt, contact your CS partner!



Transactions and History

PAYMENT TRANSACTIONS

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.

Navigating Admin

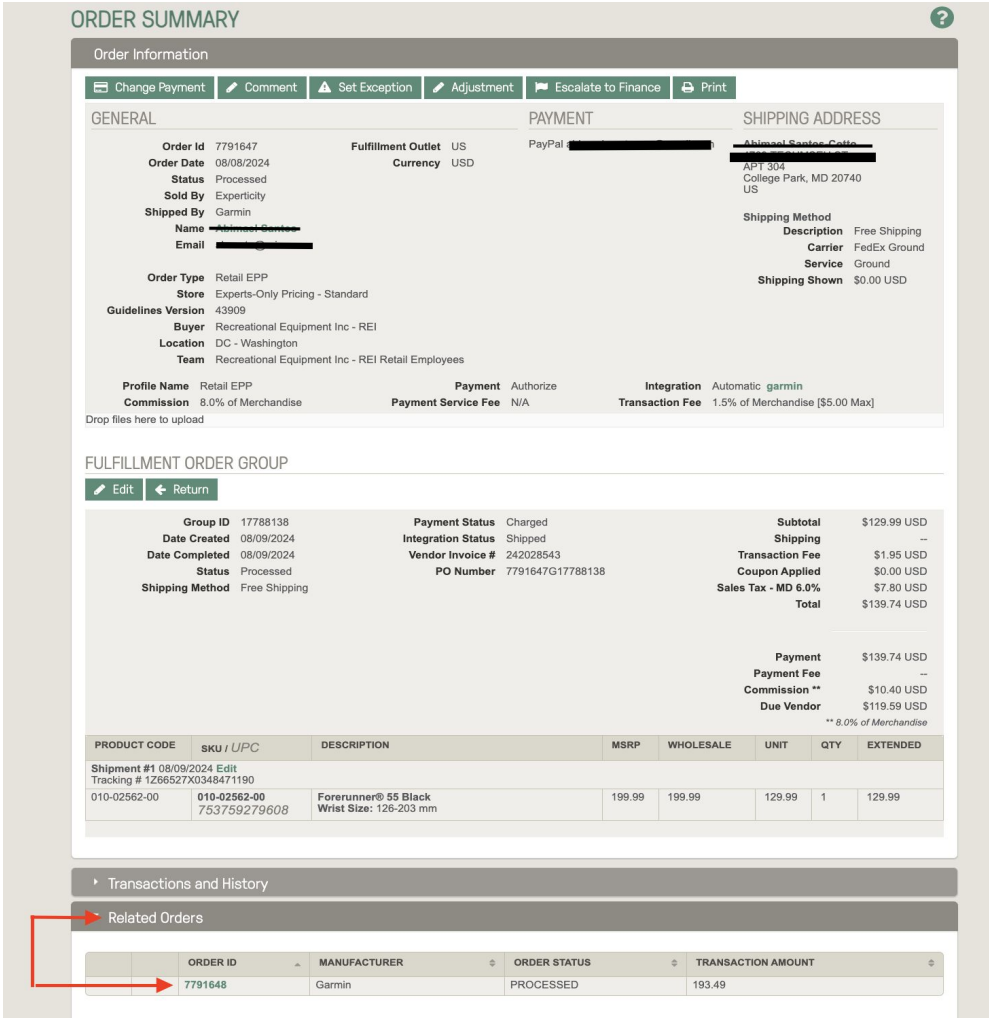
Only If Shipping Across Deals is enabled

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!



Processing Orders 101

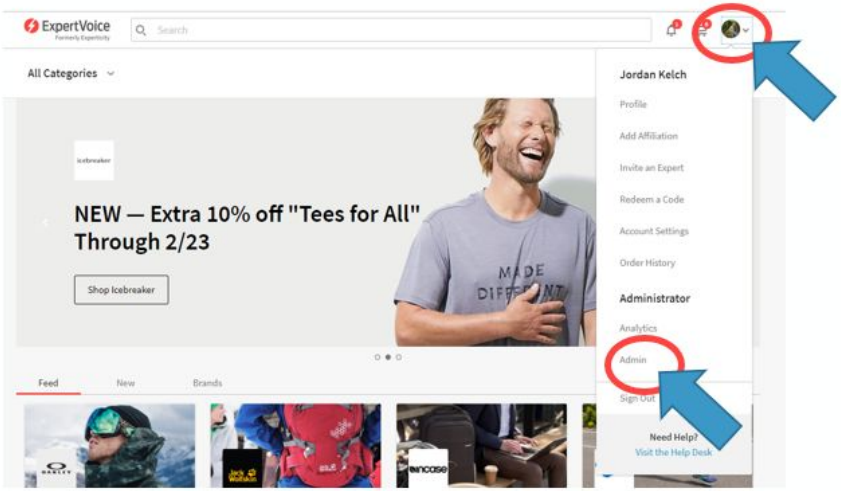
Integration Lite Export + Import

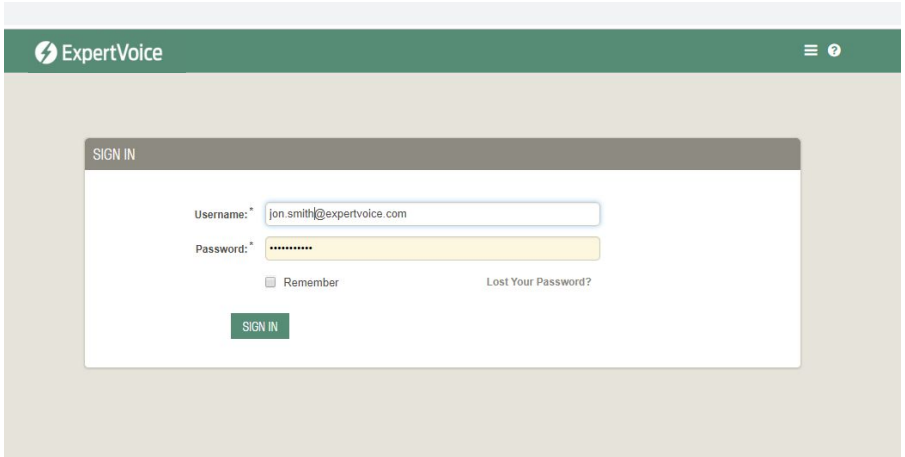
Processing Orders 101

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**"

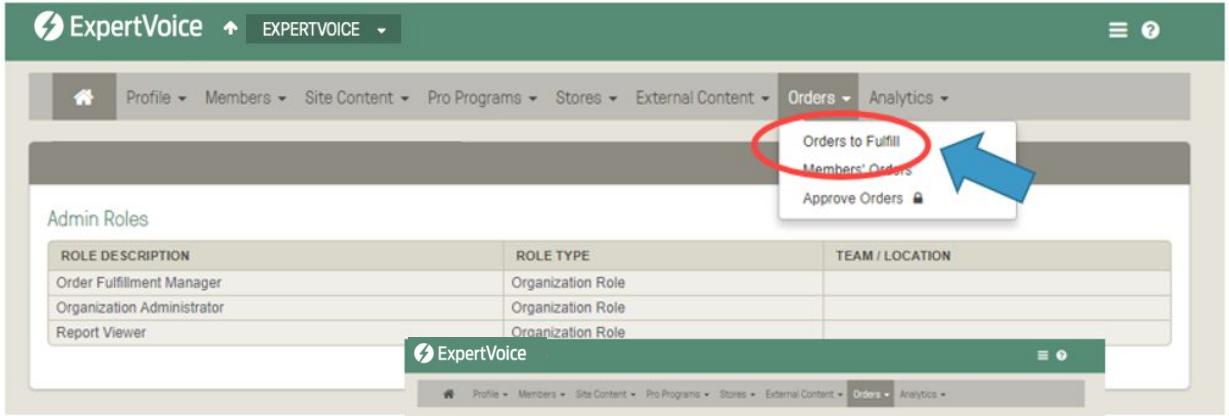
Pro Tip: Bookmark the Admin page in your web browser

Processing Orders 101

Follow these steps

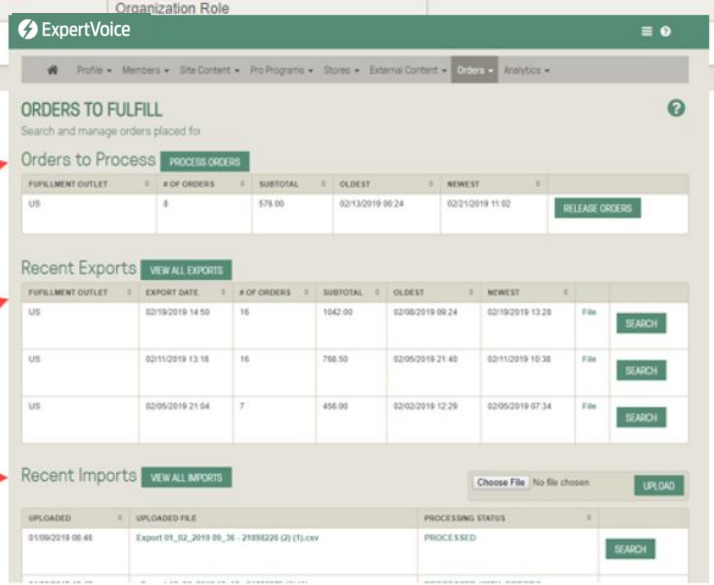
2. Orders to Fulfill:

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

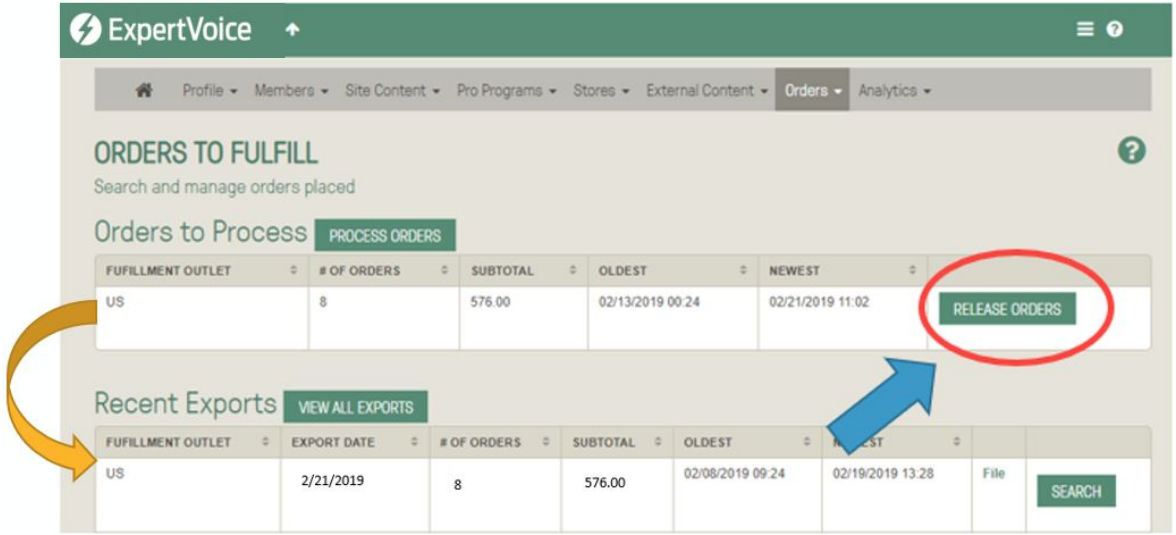


Processing Orders 101

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.

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

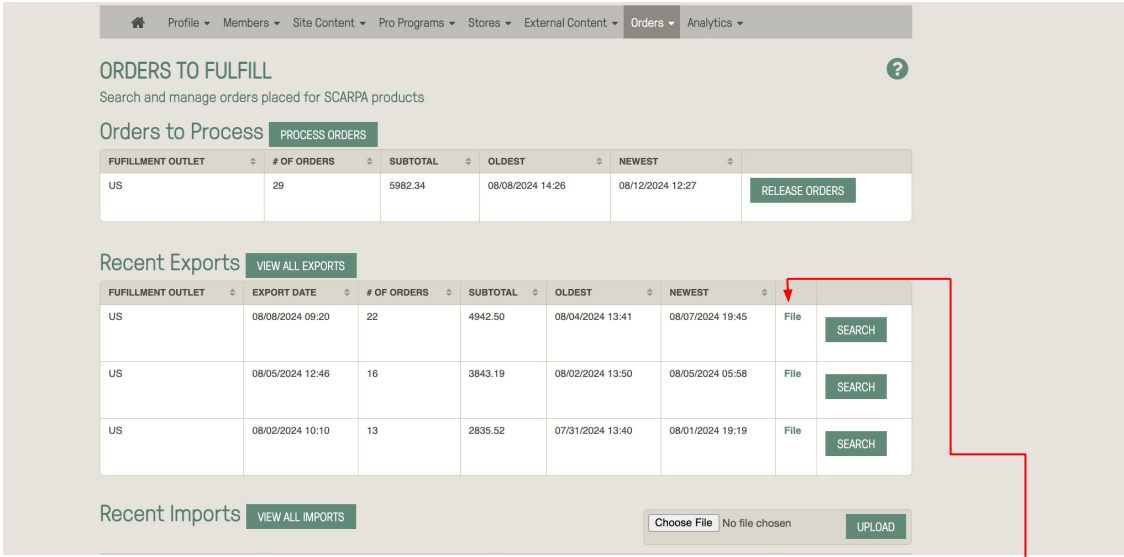
Processing Orders 101

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.

Order Export Example:

Order Id	Primary Order Id	Order Date	Member First	Member Last	SHIP TO ADDRESSEE	Ship To Attention	Shipping Address 1	Shipping Address 2	Shipping City	Shipping State /	Shipping Postal	Shipping	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 (I	1835 Central Park Plaza		Steamboat Spri	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	INVERNO	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

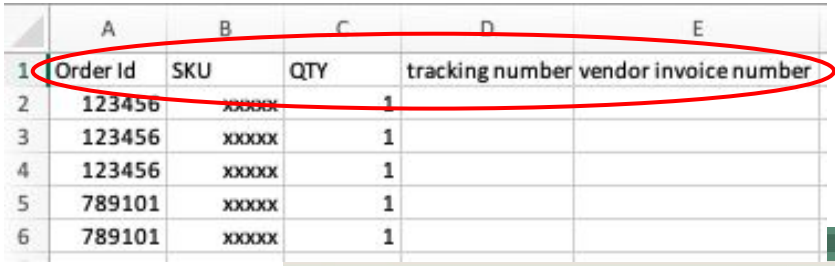
5. Import Orders:

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)

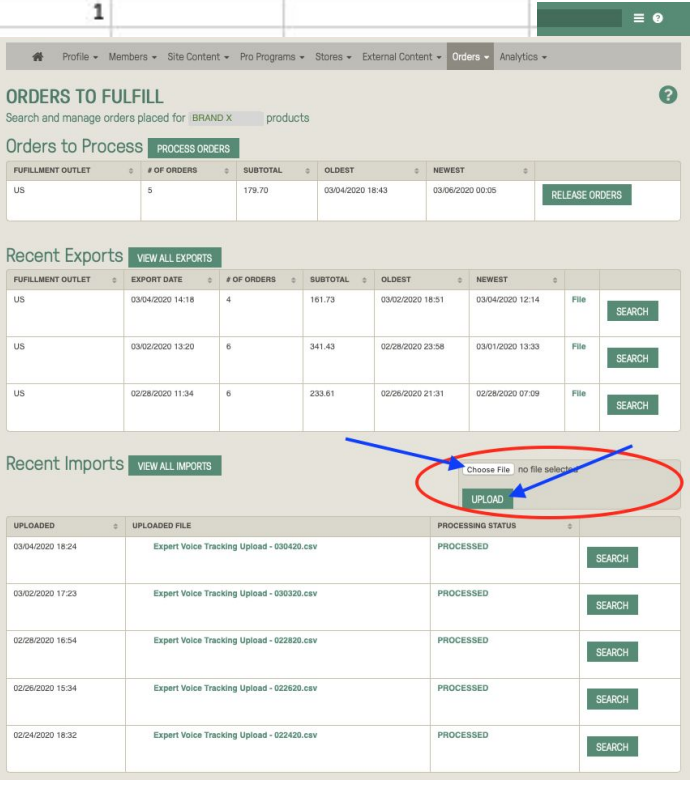
Then save file as .csv

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



	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		

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.

Processing Orders 101

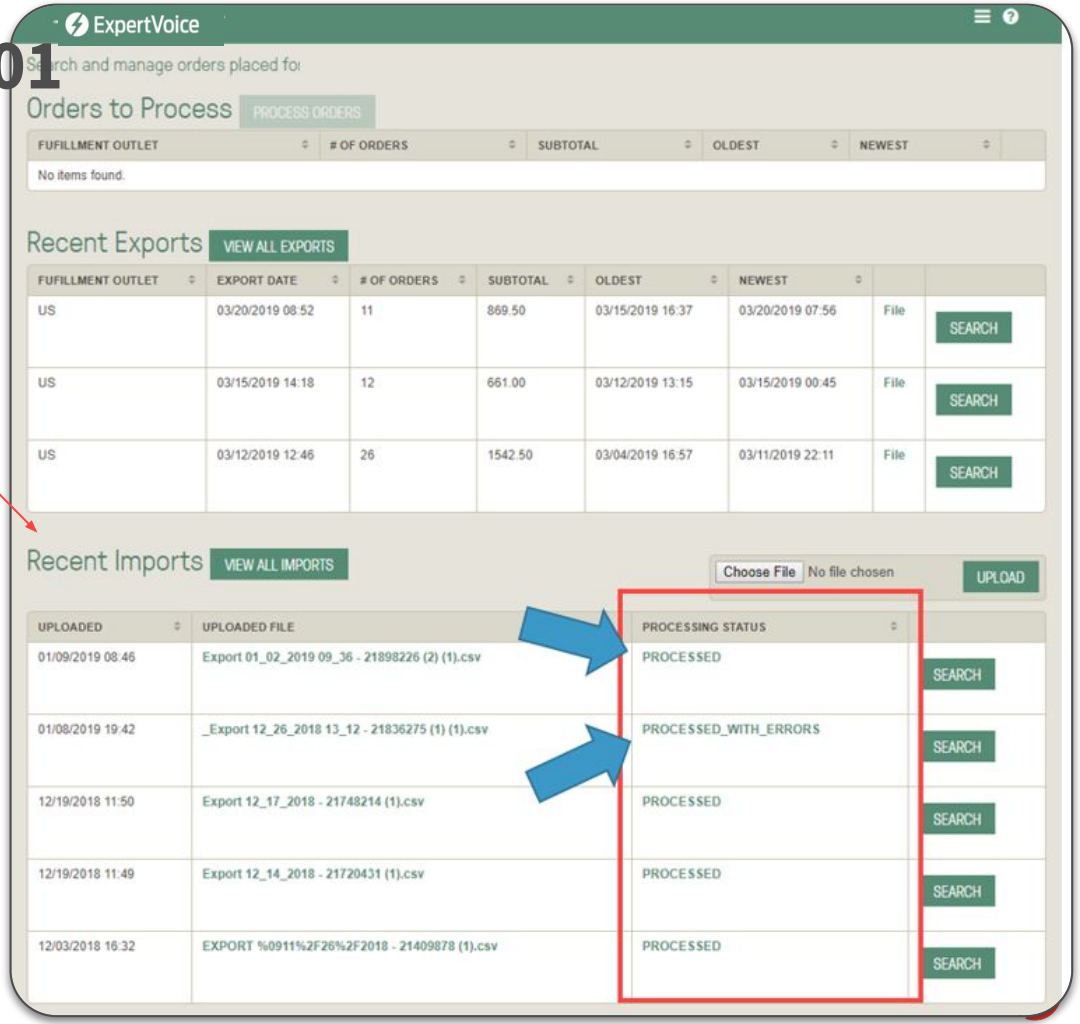
Follow these steps

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!



Processing Orders 101

Follow these steps

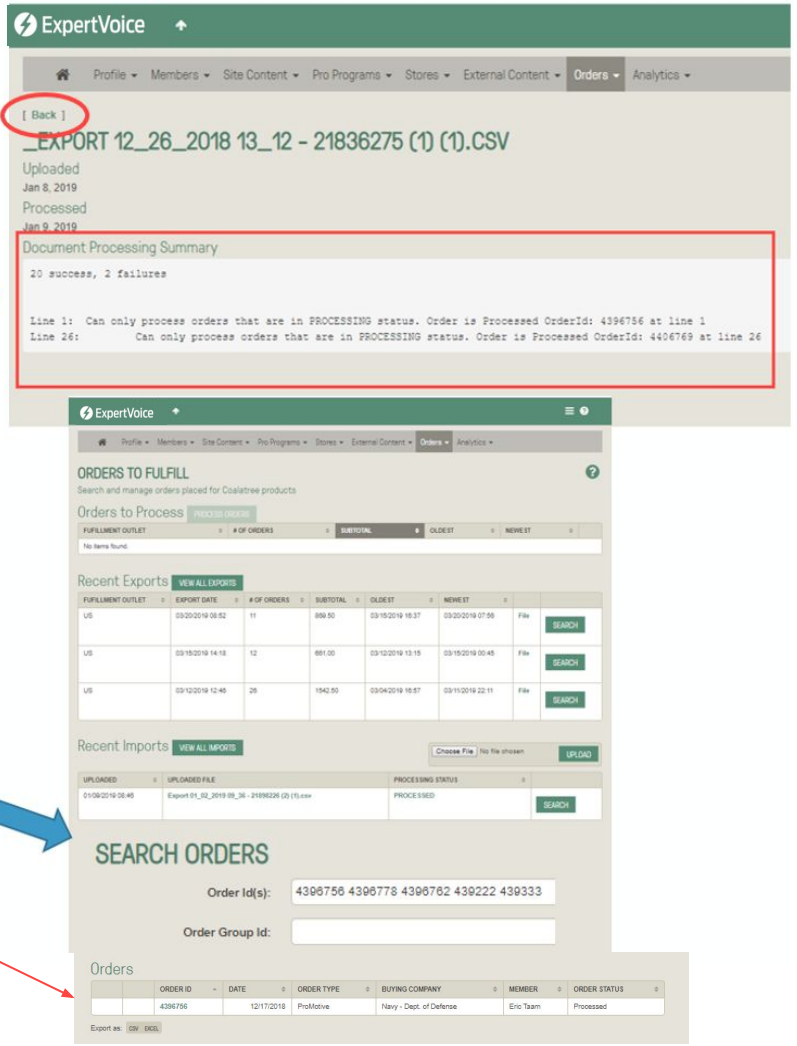
7. PROCESSED_WITH_ERRORS:

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



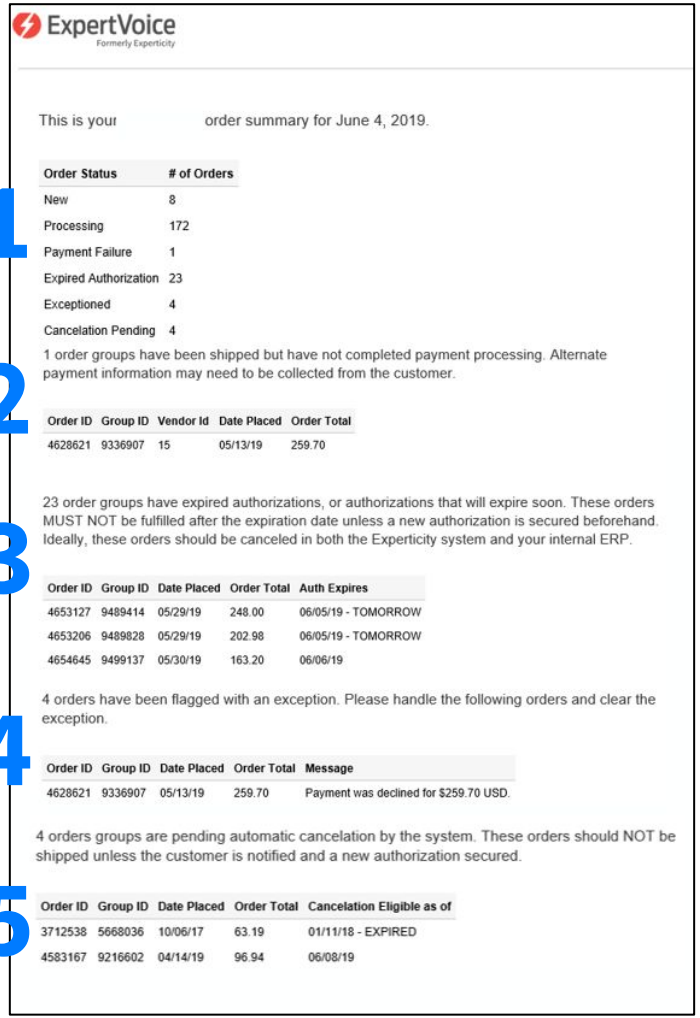
Processing Orders 101

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 **cancelation**



ExpertVoice
Formerly Experticity

This is your order summary for June 4, 2019.

1

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

2

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

3

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

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.

5

4 orders groups are pending automatic cancelation 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	Cancelation 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:

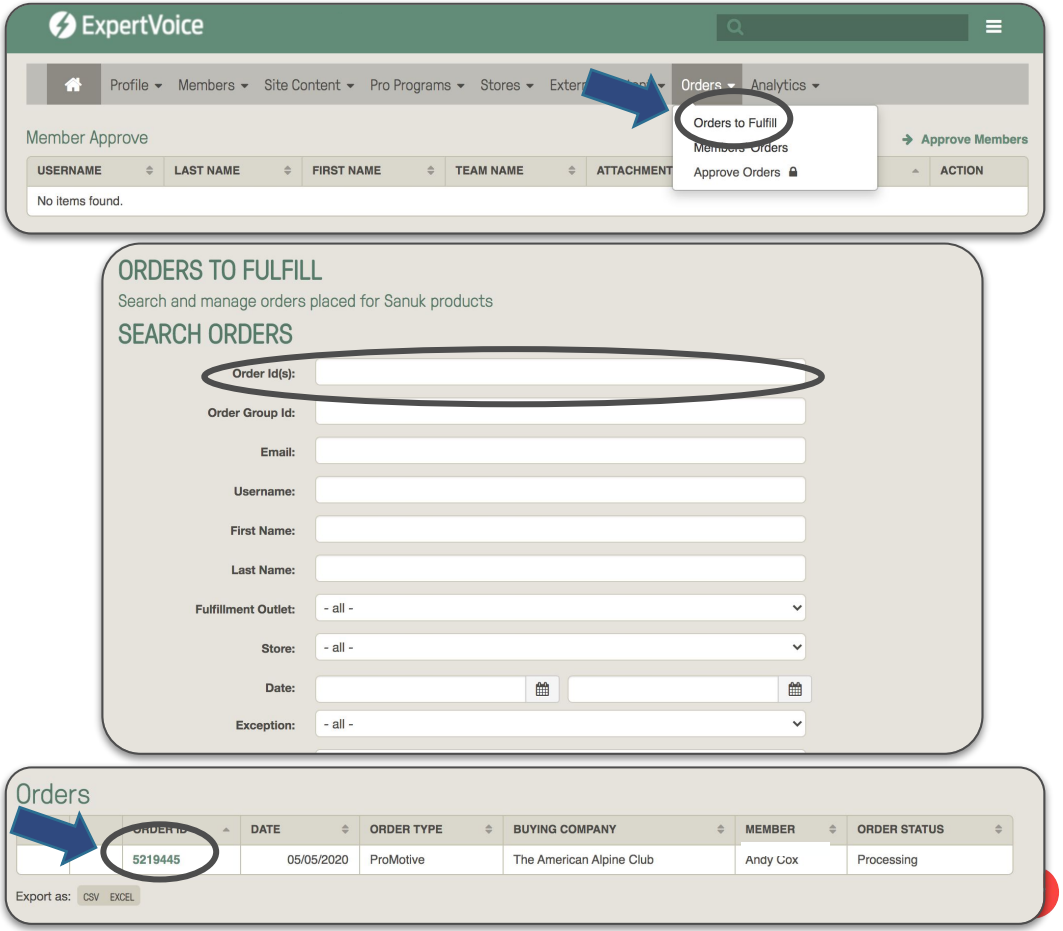
The **Daily Order Email** will identify which orders have expired authorizations and need to be renewed.

***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**



How to Renew an Expired Credit Card Authorization

Follow these steps

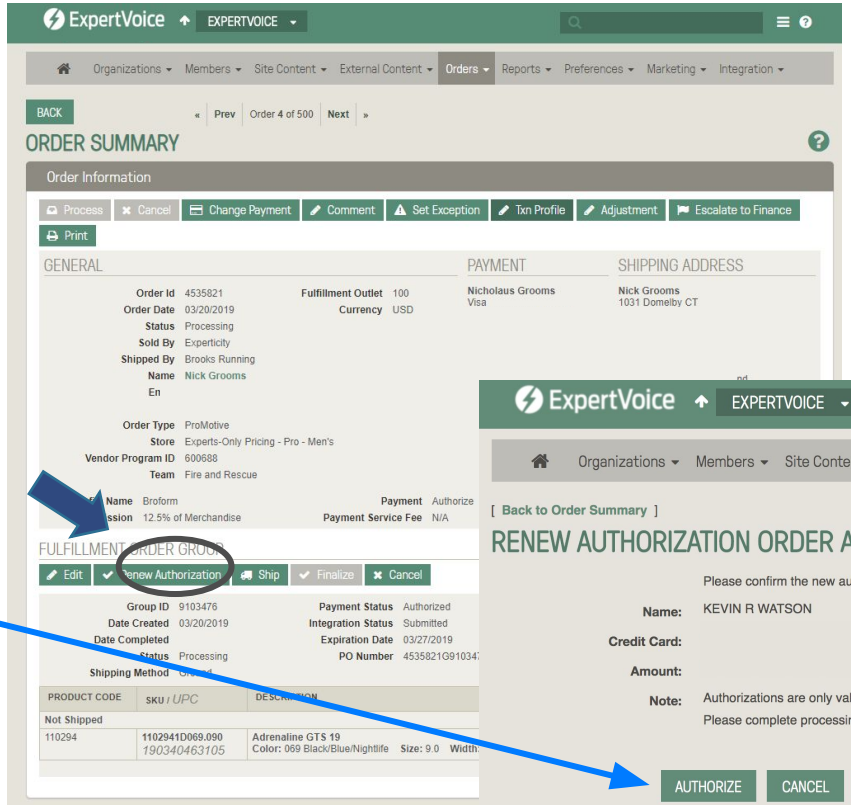
2. Reauthorizing an Order:

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

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

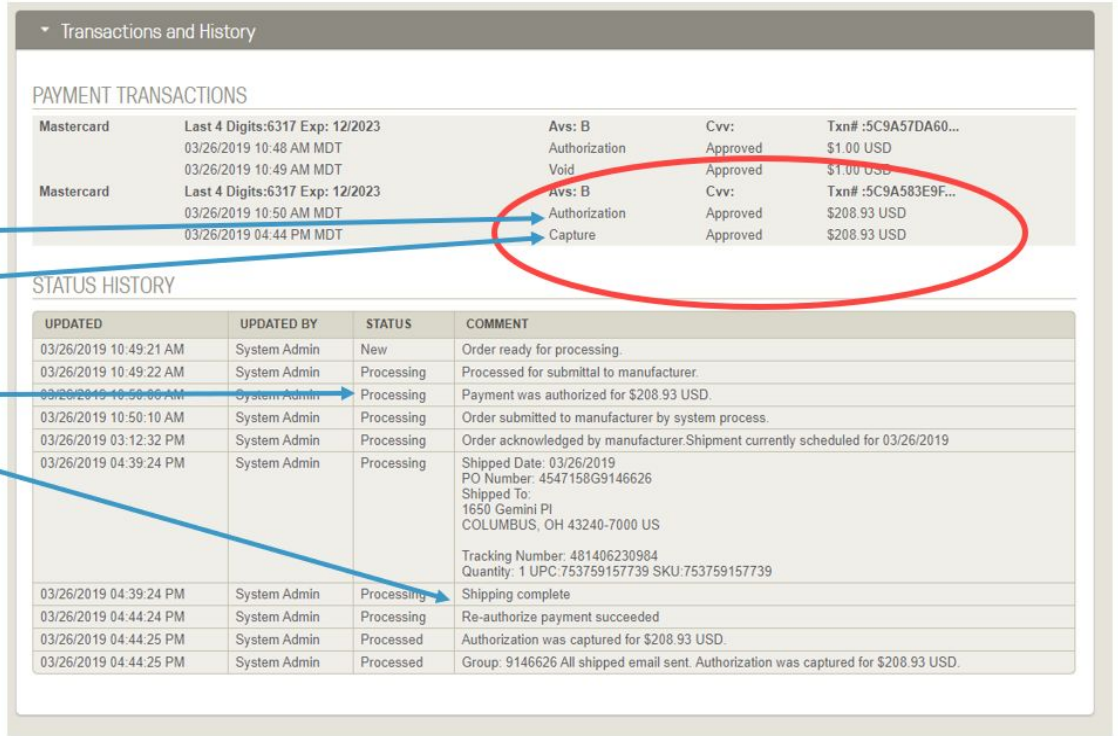
Follow these steps

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

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.
[illegible]	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

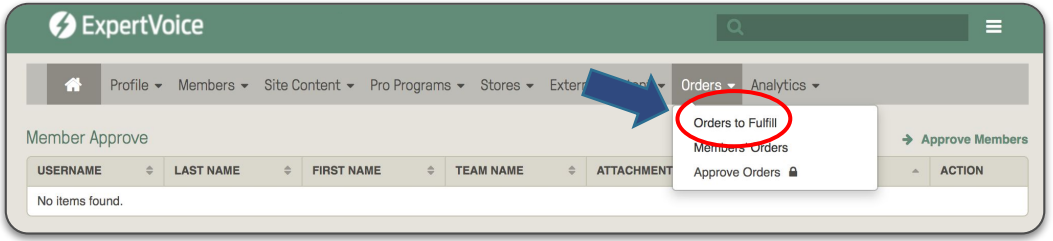
Follow these steps

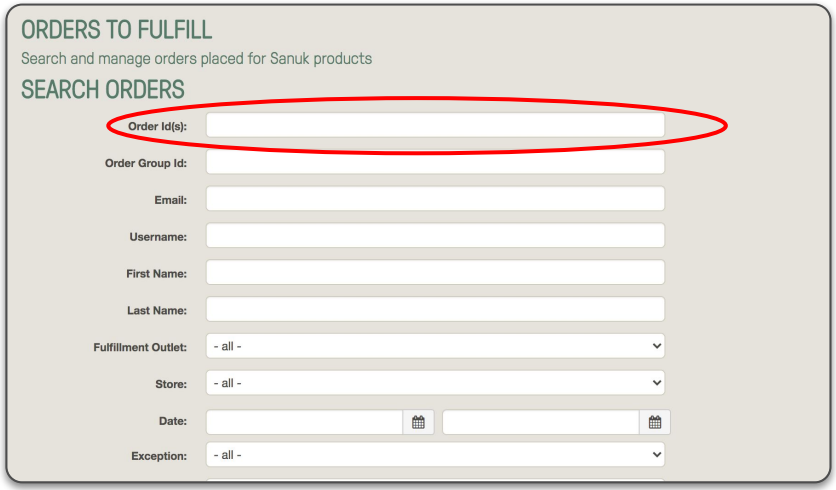
1. Orders to Cancel or Refund:

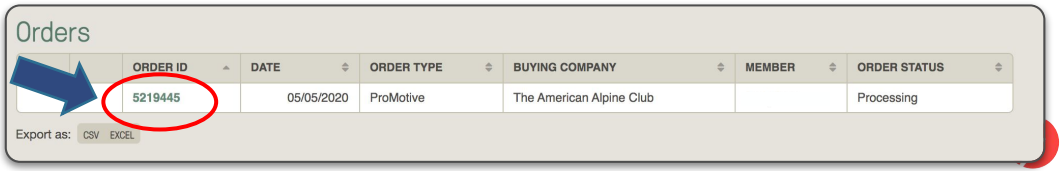
From the home screen, click the "**Orders**" dropdown, select "**Orders to Fulfill**"

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**







How to Cancel Orders & Process Returns

Follow these steps

2. Cancelling an Order:

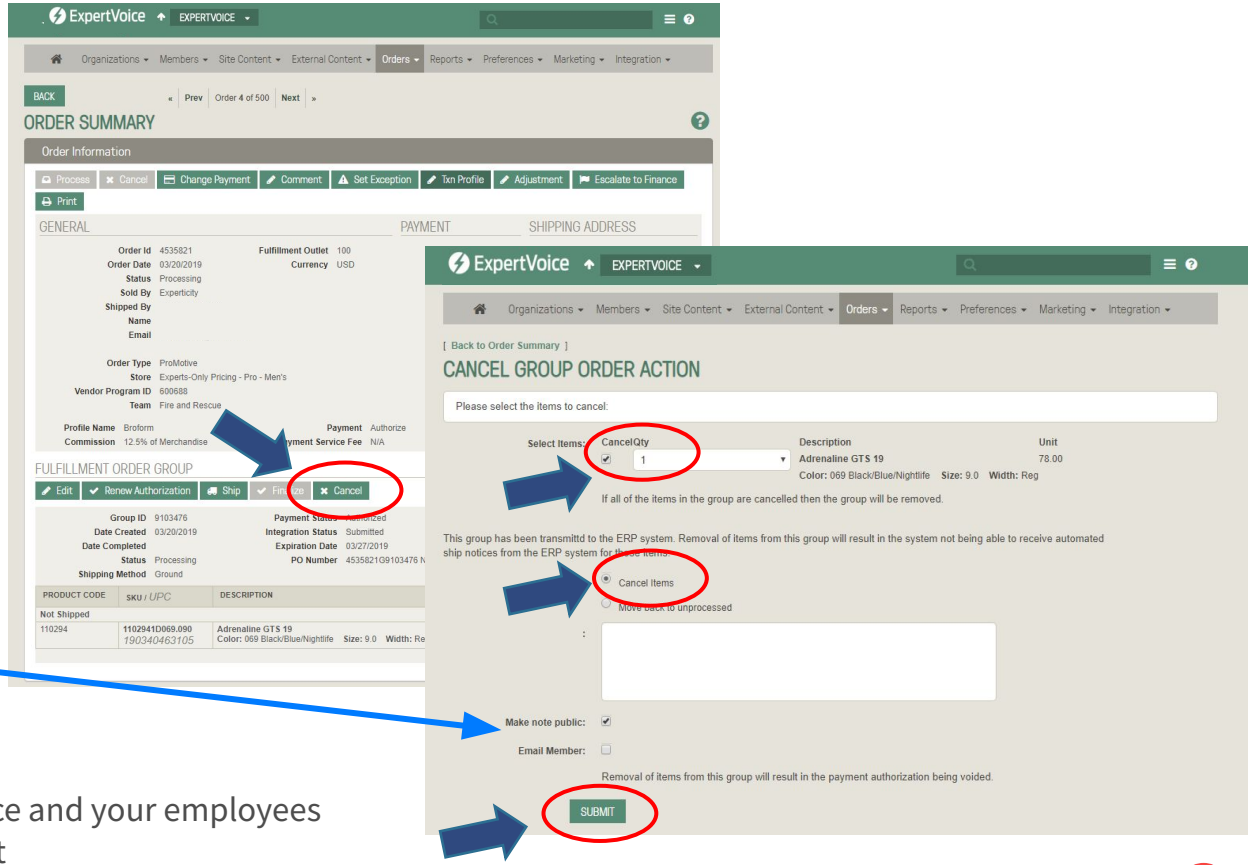
From the Order Summary screen:

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

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

“Email Member” will email the comment to the member

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



How to Cancel Orders & Process Returns

Follow these steps

3. Refund/Return:

From the order summary screen

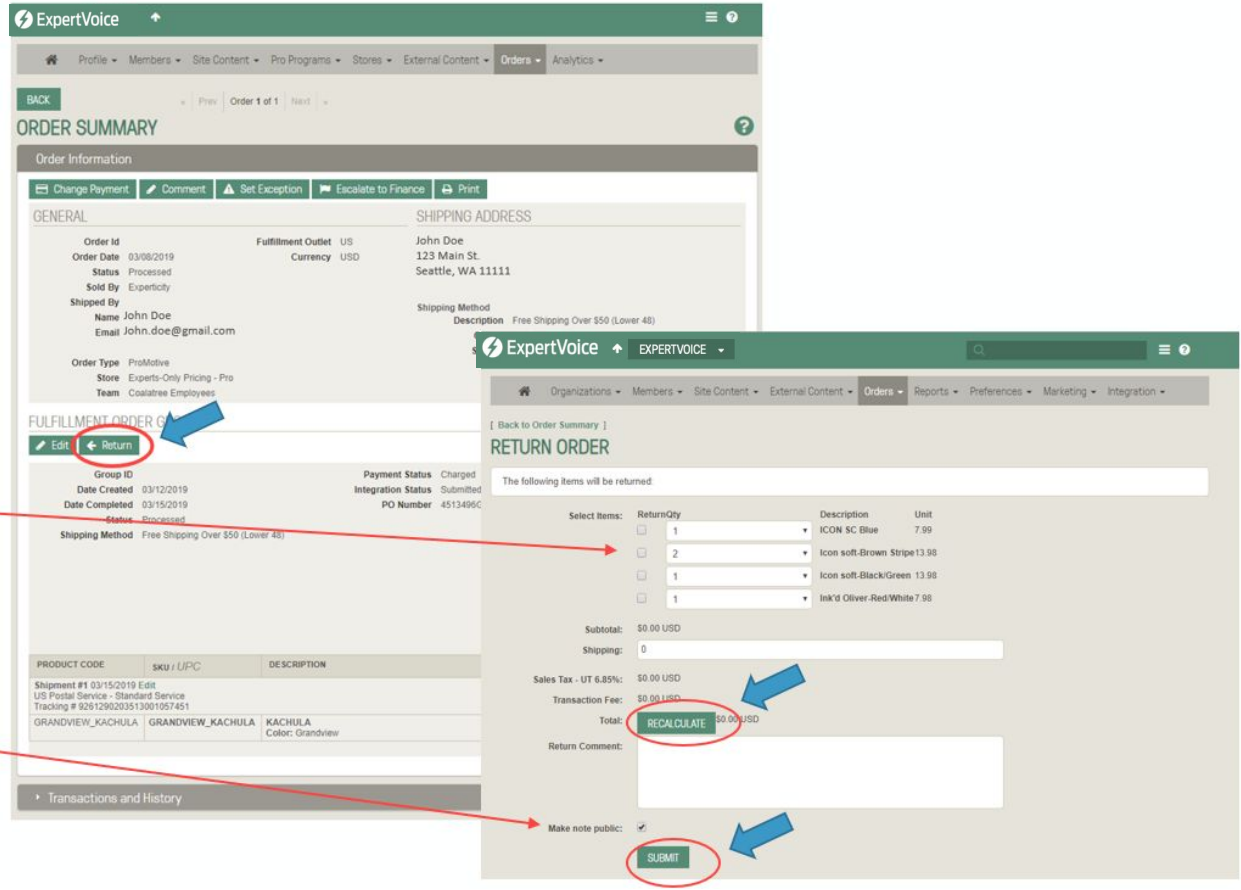
Click “**Return**”

Select the items to be returned
Adjust shipping if applicable

Click “**Recalculate**” and confirm the total
Input a comment if desired

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

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



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/twosy)**
- **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 accidently 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 with automatically attempt to reauthorize the credit card and capture payment at the time of the upload.**