ExpertVoice

Order Processing

Order Processing

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- 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

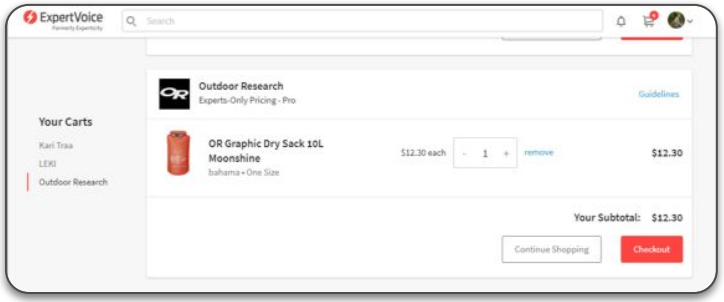
Best Practices:

- 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

Admin Overview

Navigating Admin

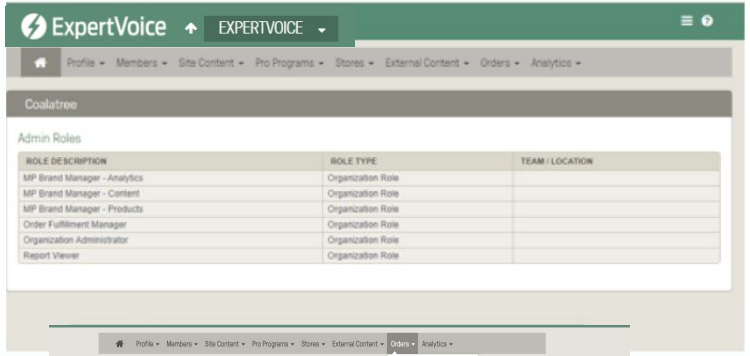
1. Customers place orders on ExpertVoice.com

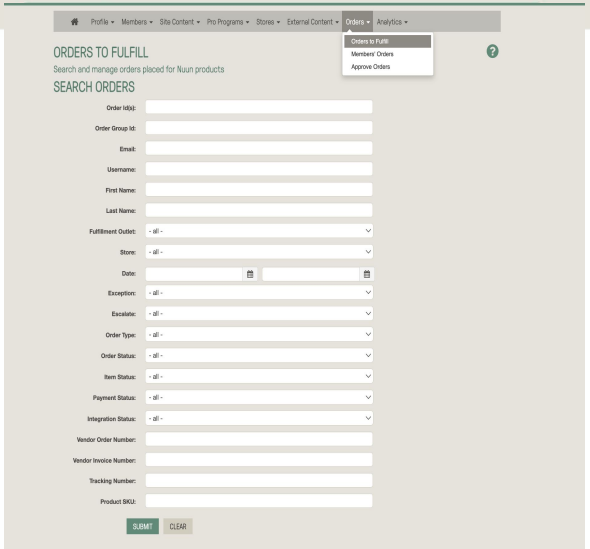


2. Order fulfillment manager exports new order batches from admin.expertvoice.com

We call this portal the “Admin.” This is where you’ll manage orders, reports, members, etc.

"Admin"





3. Brand processes orders

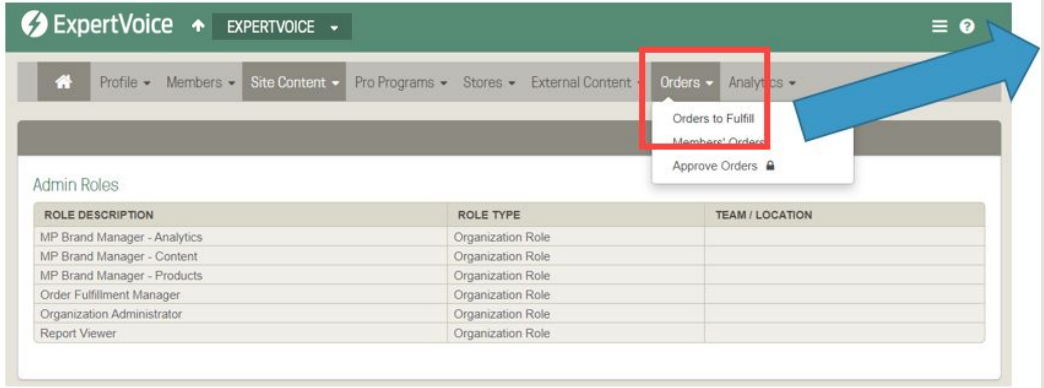
4. Order fulfillment manager captures payment and inputs tracking number in “Admin”

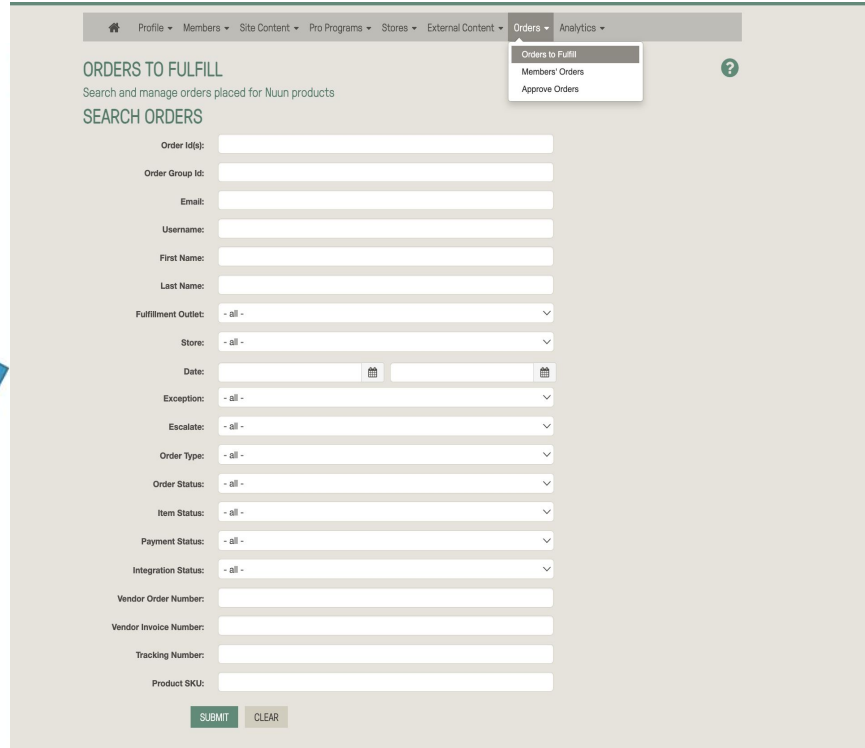
5. Customer leaves awesome review

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

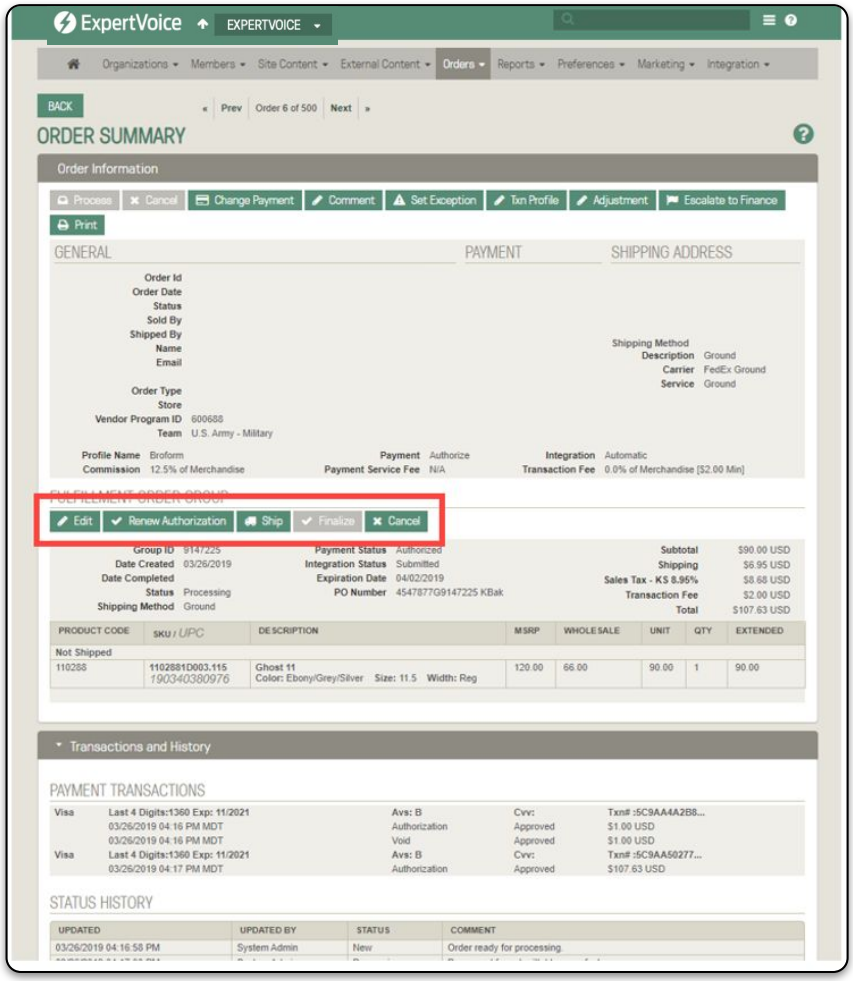
Click **Ship** to manually ship the order, this is where you will input the tracking number if applicable. More explanation to come.

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

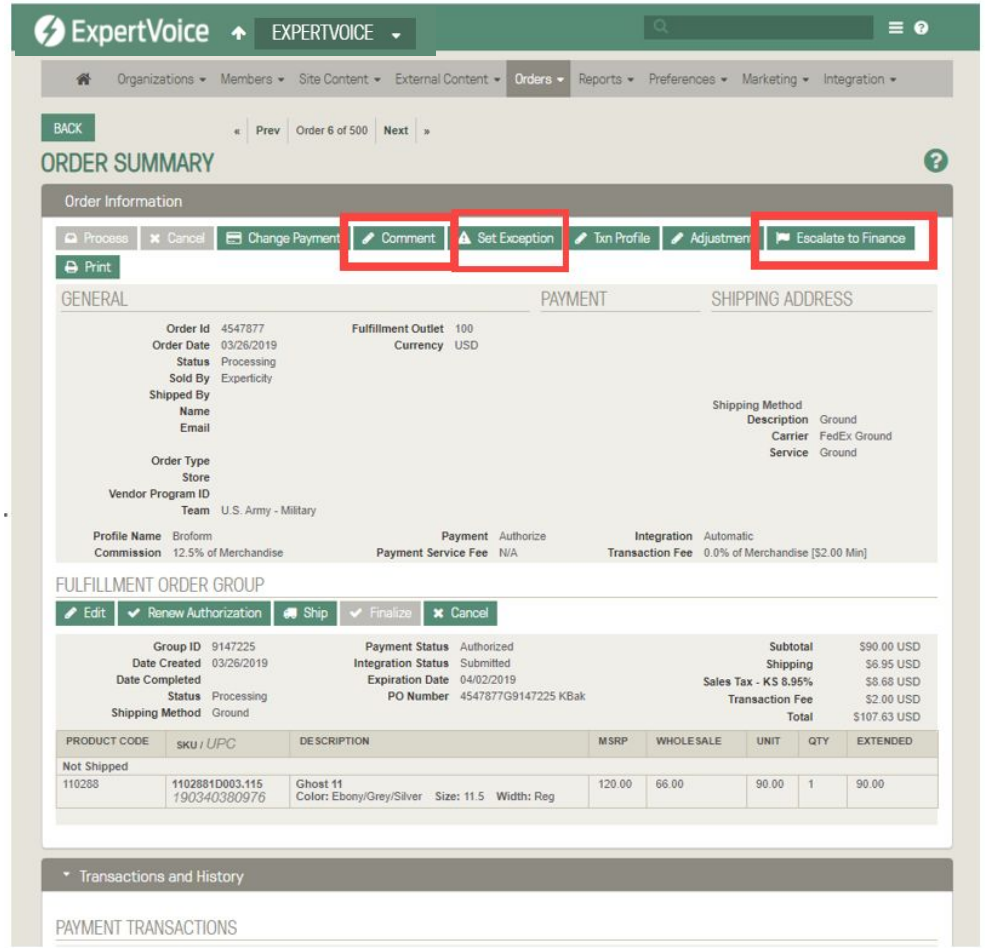
Ship No Capture means the item shipped and payment was not captured. Remember to finalize the order before shipping!

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

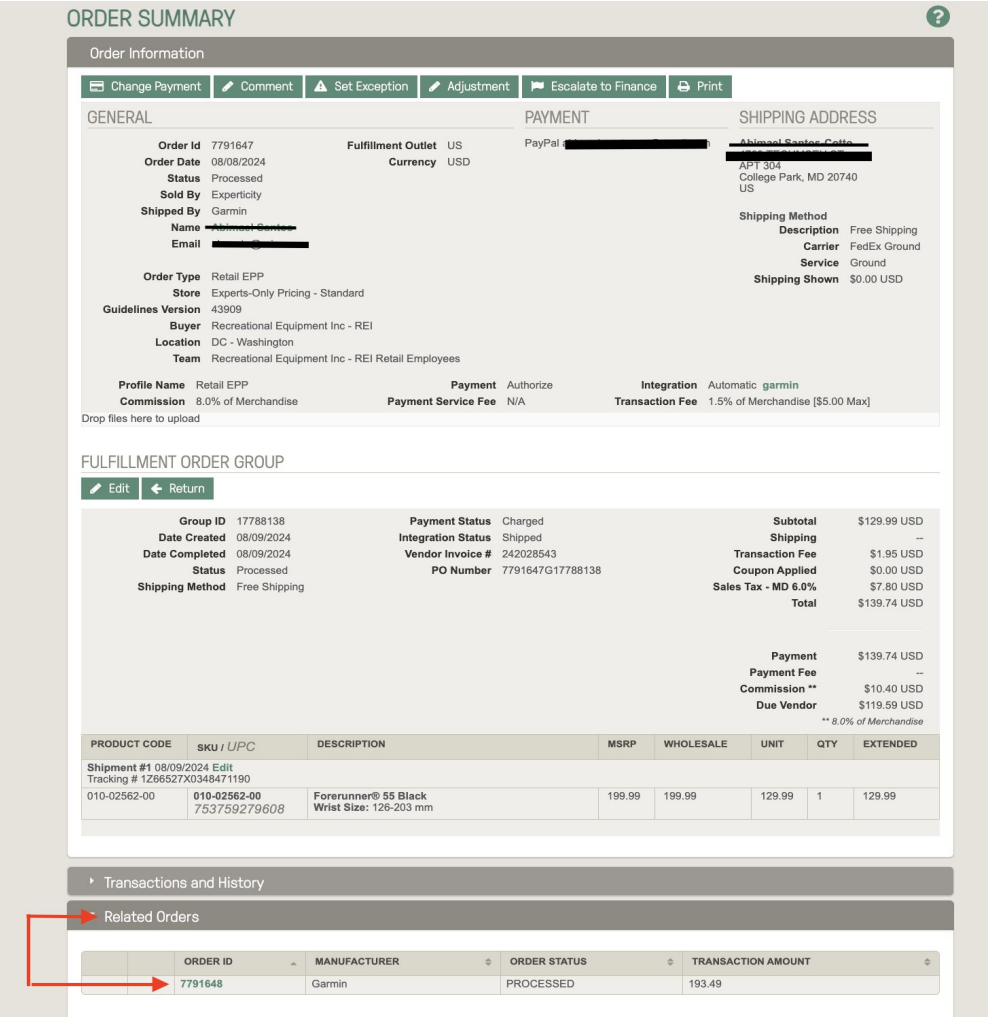
<u>*Only If Shipping Across Deals is enabled*</u>

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

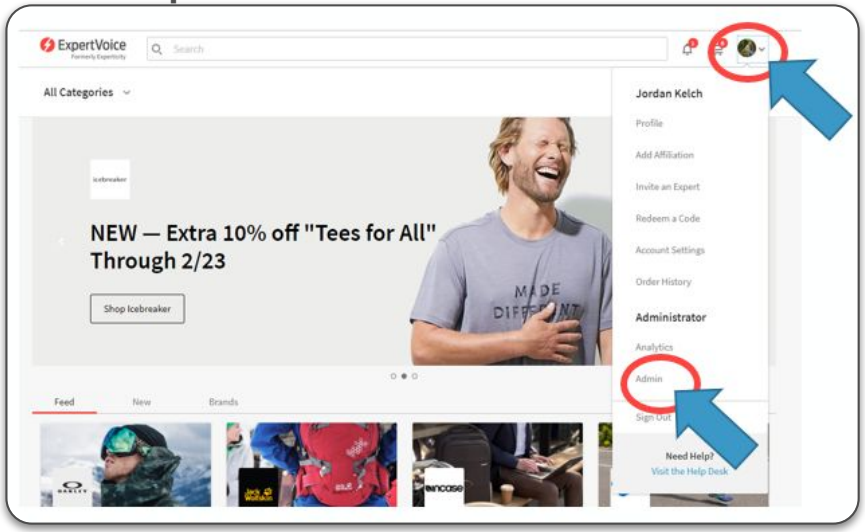
Manual

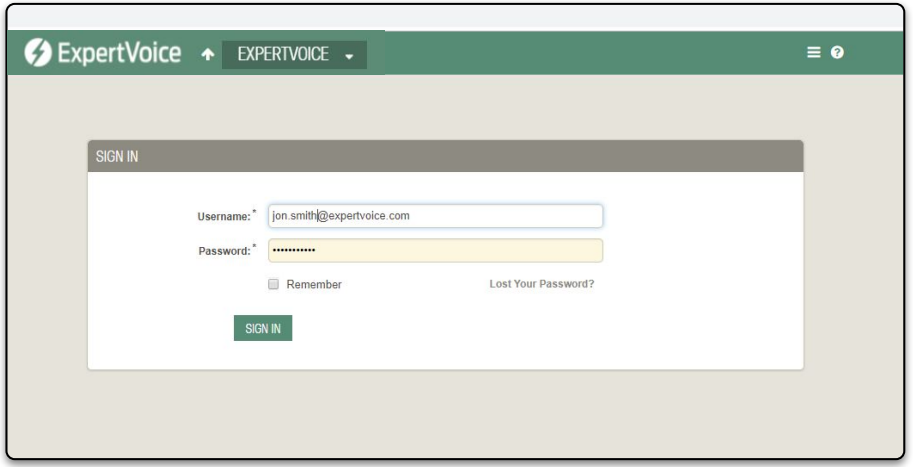
Processing Orders 101

Follow these steps

1. **Login:**

ExpertVoice.com or **Admin.expertvoice.com**





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

Processing Orders 101

Follow these steps

2. Orders to Fulfill:

From the home screen,

click the “**Orders**” dropdown,

select “**Orders to Fulfill,**”

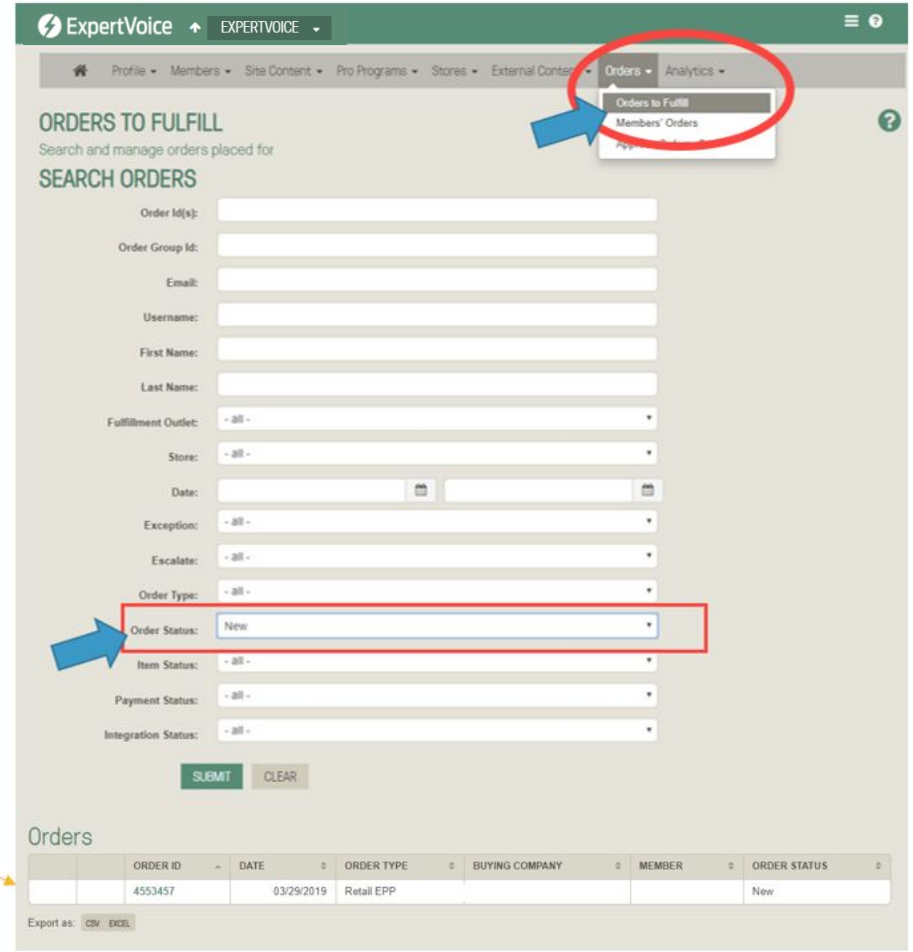
In the “**Order Status**” section,

select the “**New**” drop down

Submit

Orders will appear at the bottom of the screen

Click on the order



Processing Orders 101

Follow these steps

3. Process Order:

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

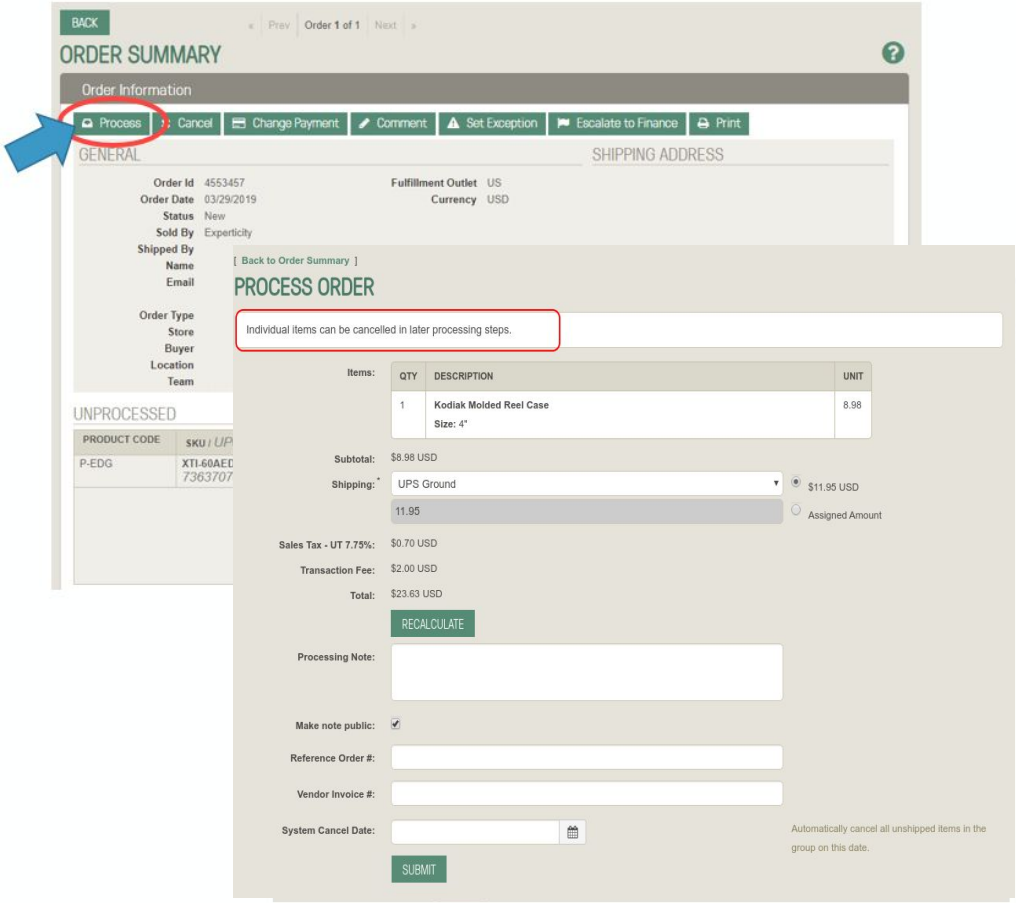
Click “**Process**,”

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

Select **Shipping** method,

Process Note, Reference Order #, Vendor Invoice # are all **optional,**

Submit

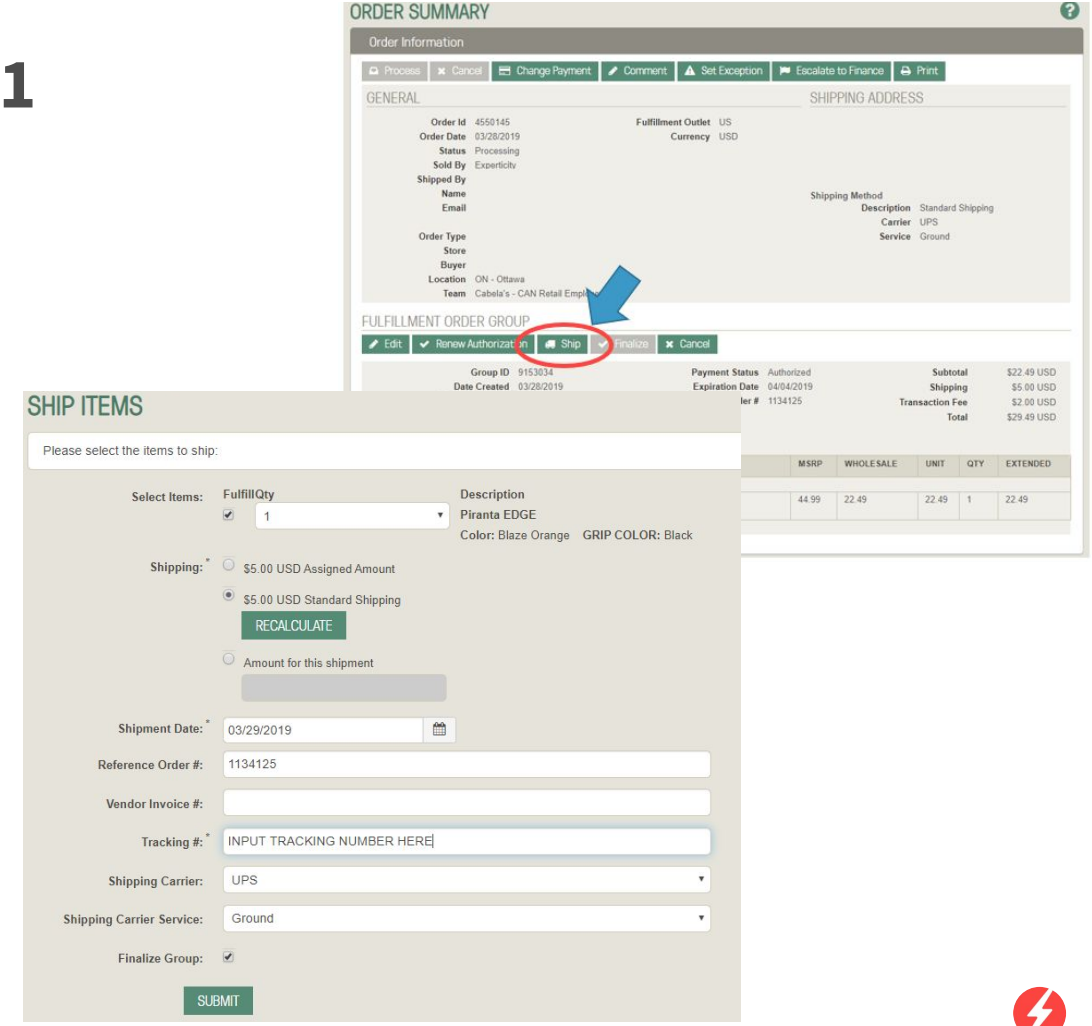


Processing Orders 101

Follow these steps

4. Ship Order:

- From the **Order Summary** screen, Click "**Ship**"
- **Select Items:** All items will automatically be selected, deselect items that are out of stock or for any reason will not be shipped
- Select **Shipping** method
- Reference Order # and Vendor Invoice # are **optional**
- **Input tracking number** (if no tracking number input N/A)
- **Select "Finalize Group,"** this captures payment!
- Click **Submit**



Processing Orders 101

Follow these steps

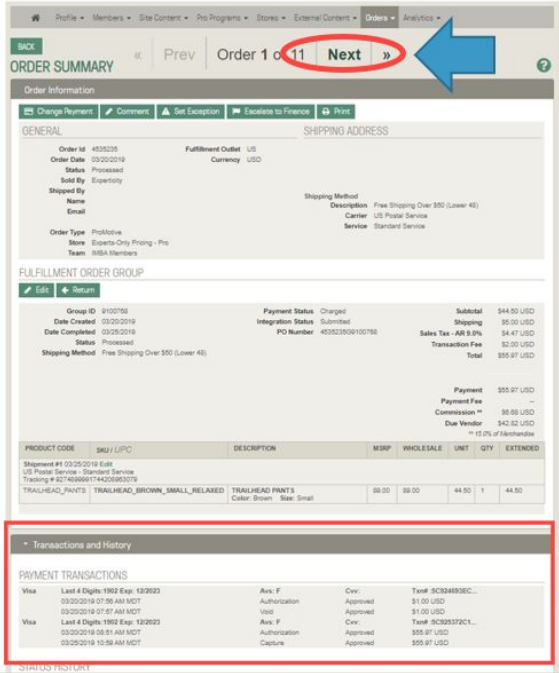
5. Confirm Payment was Captured

From the **Order Summary** screen,

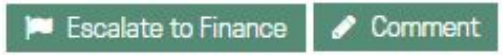
Scroll down to the “**Transactions and History**” section,

Confirm “**Capture**” was “**Approved**”

If so, move on to the next order by clicking “**Next**” at the top of the **Order Summary** screen



If you have issues capturing payment, click “**Escalate to Finance**” and contact your CS partner, comments are always helpful!



Order Summary Emails

Have your CS partner assign the appropriate team members to the **Order Summary Email** list. Order Summary Emails are sent daily (check your spam folder). This is a useful tool for order fulfillment management.

There are 5 sections in the summary:

1. An **Overview Summary of order statuses**
2. Orders that have **shipped but have not completed payment** processing. These orders need payment collected and marked as Escalate to Finance.
3. Orders that have **expired authorizations** need to be reauthorized in Admin. Do not re-authorize a credit card until the authorization is expired and order is ready to ship.
4. Orders flagged as **Exceptions**
5. Ordering pending **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

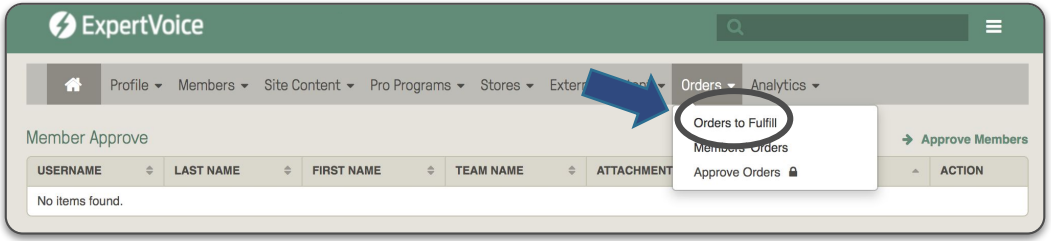
1. Orders to reauthorize:

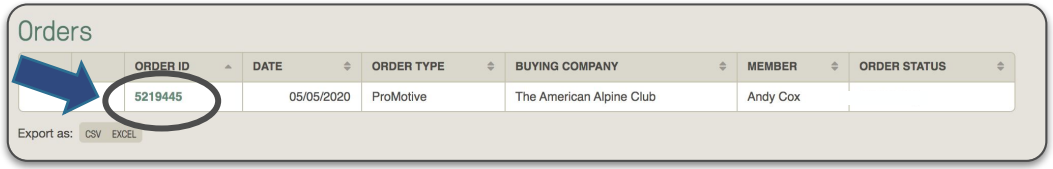
***Reminder that you should not renew an authorization until the first one has expired.** Renewing a non-expired auth will lead to the member being double-authed and may get declined if there aren't sufficient funds to cover both auths. **You should also not renew an authorization until you know that the order will be ready to ship**. A member can see each time their card is authorized.

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

In the "**Orders to Fulfill**" screen:

- Search for the **Order ID** that needs to be reauthorized. Click Submit at the bottom
- Order will appear below
- **Select the order**





How to Renew an Expired Credit Card Authorization

Follow these steps

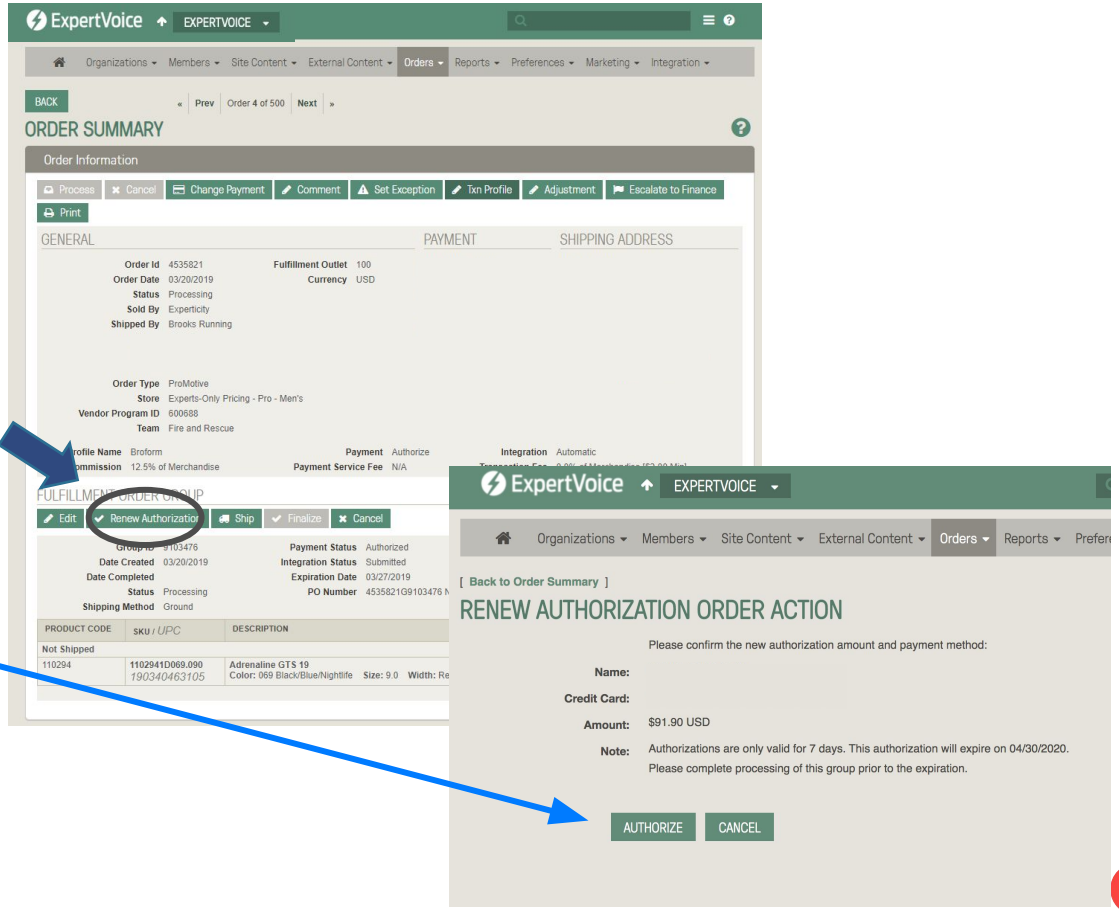
2. Reauthorizing an Order:

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

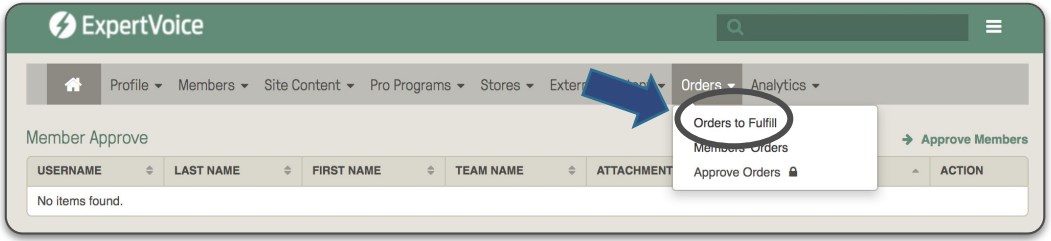
UPDATED	UPDATED BY	STATUS	COMMENT
03/26/2019 10:49:21 AM	System Admin	New	Order ready for processing.
03/26/2019 10:49:22 AM	System Admin	Processing	Processed for submittal to manufacturer.
03/26/2019 10:50:06 AM	System Admin	Processing	Payment was authorized for $208.93 USD.
03/26/2019 10:50:10 AM	System 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.

How to Cancel Orders & Process Returns

How to Cancel Orders & Process Returns

Follow these steps

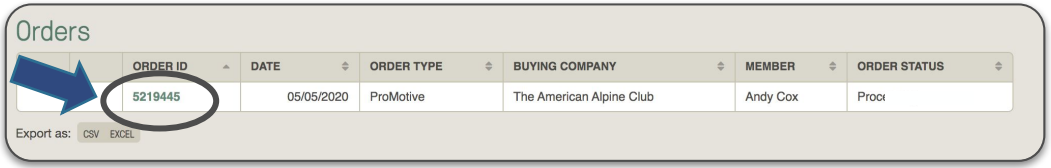
1. Orders to Cancel or Refund:



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:

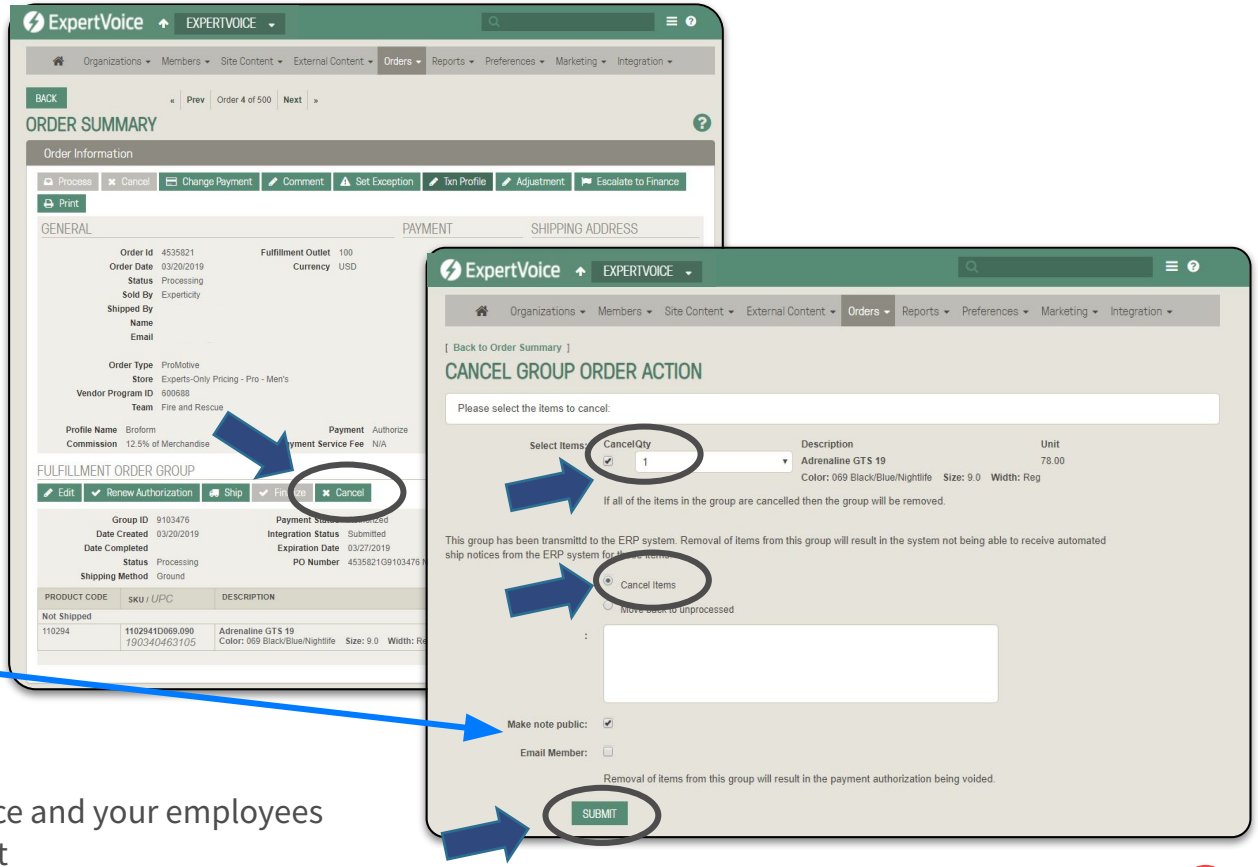
From the Order Summary screen

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

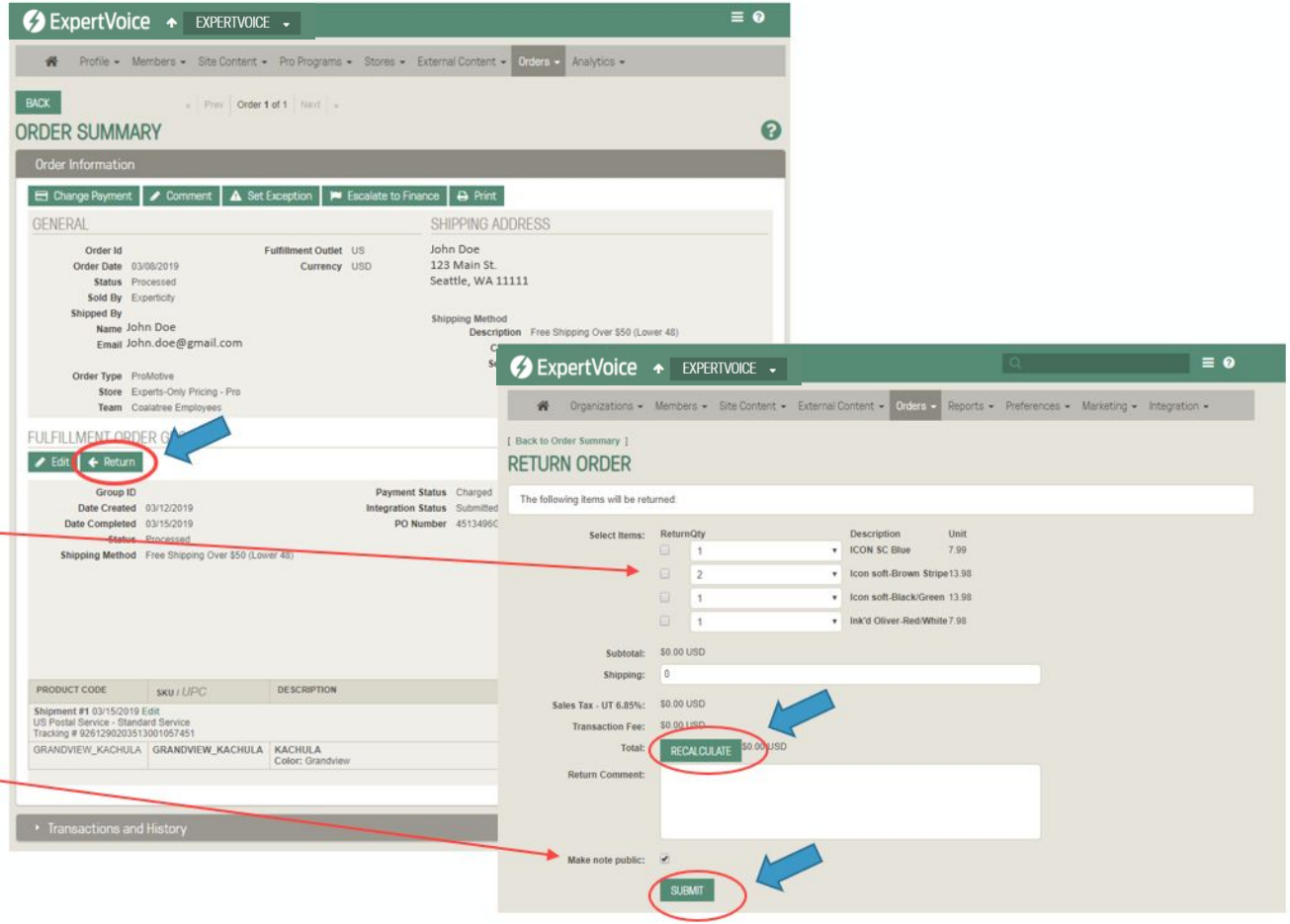
3. Refund/Return:

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.