

# Order Processing



# Order Processing

- Order Fulfillment Manager Role & Responsibilities
- Admin Overview
- Order Processing 101
  - Manual
- How to Renew an Expired Credit Card Authorization
- How to Cancel Orders & Process Returns

# **Order Fulfillment Manager Role & Responsibilities**

# Order Fulfillment Manager Role & Responsibilities

A brand's Order Fulfillment Manager (OFM) is the main point of contact for the ExpertVoice Customer Success Partner as well as the Expert Support team. This can be for anything related to order processing and inventory management. It is important for a brand to process orders in a timely manner and keep inventory numbers up to date. This way Experts have a positive experience with the brand on ExpertVoice and ultimately become brand advocates for them after experiencing their products.

## Main Role:

- Receive and fulfill orders in a timely, efficient manner
- Keep inventory levels up to date
- Responsible for processing refunds and cancellations as needed
- Assist with customer service questions either directly from the expert or ExpertVoice's Expert Support team
- Work with the Customer Success Partner to troubleshoot any issues

## Best Practices:

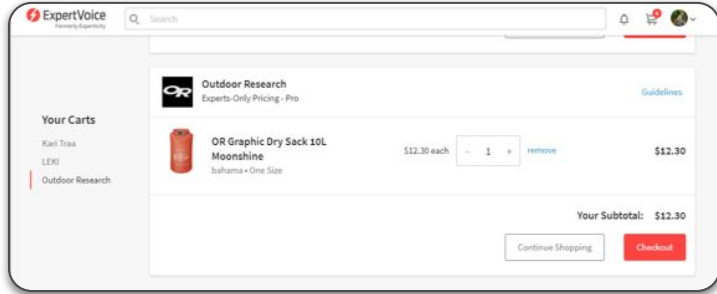
- Monitor orders via the Daily Order Summary email
- How often an OFM should be coming into the ExpertVoice admin to process orders is dependent on order volume. We recommend going in at least a couple times a week, but for high volume brands, orders should be processed on a daily basis. All orders should be processed within 7 days due to the card authorization window
- If inventory availability fluctuates regularly, the OFM should update the inventory file for ExpertVoice on a daily basis. Otherwise, we recommend updating inventory at least once a week



# 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.



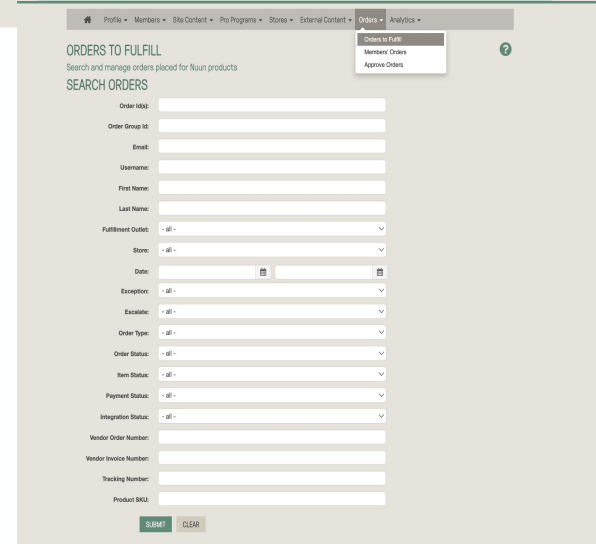
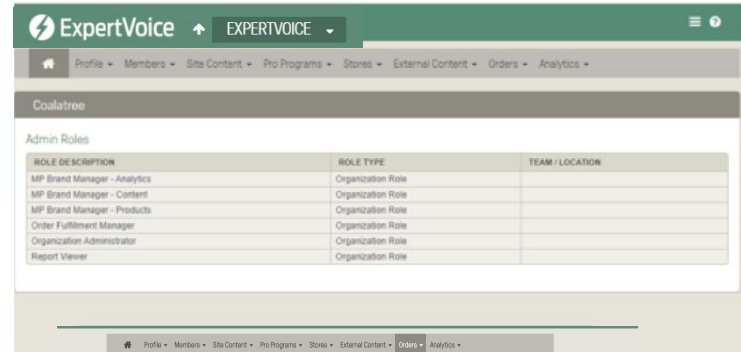
## 3. Brand processes orders

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

## 5. Customer leaves awesome review



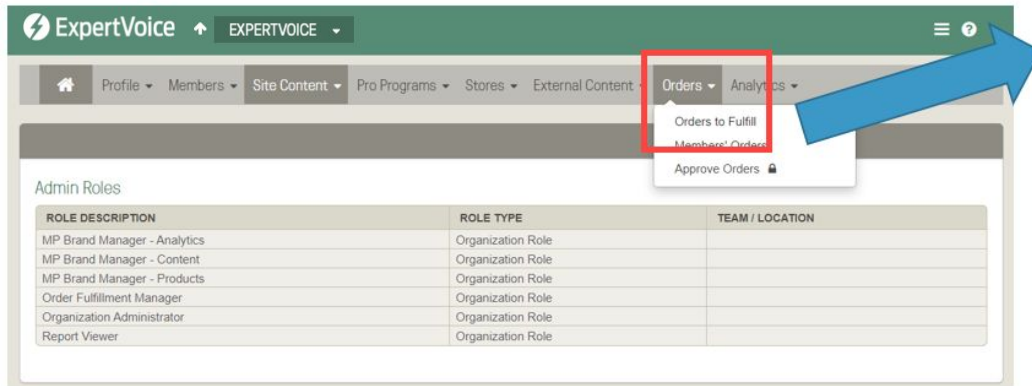
“Admin”



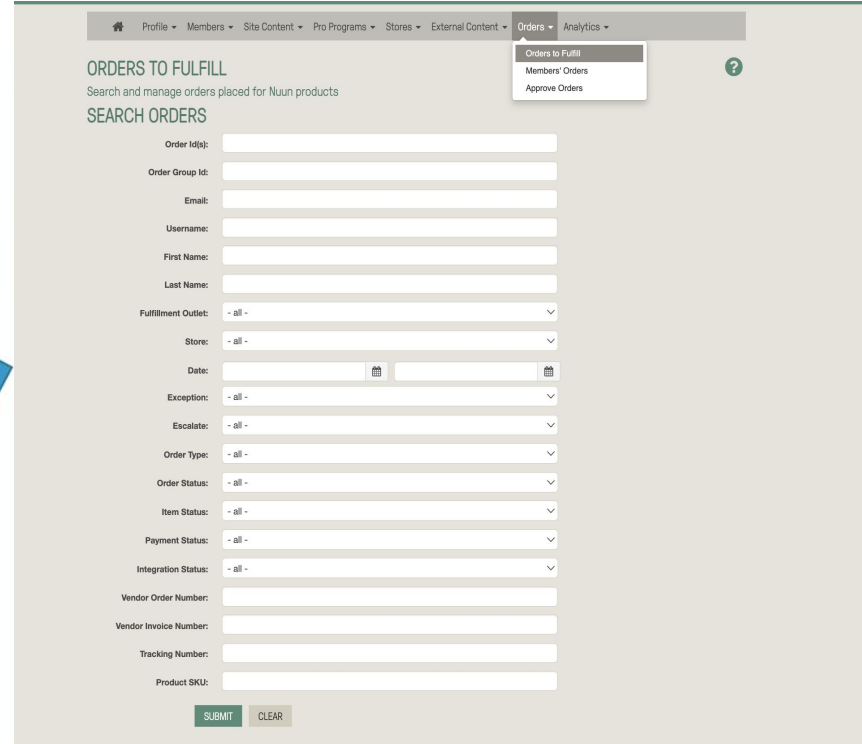
# Navigating Admin

## Admin Home Screen Drop Downs

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



ROLE DESCRIPTION	ROLE TYPE	TEAM / LOCATION
MP Brand Manager - Analytics	Organization Role	
MP Brand Manager - Content	Organization Role	
MP Brand Manager - Products	Organization Role	
Order Fulfillment Manager	Organization Role	
Organization Administrator	Organization Role	
Report Viewer	Organization Role	



**ORDERS TO FULFILL**  
Search and manage orders placed for Nuun products

**SEARCH ORDERS**

Order Id(s):

Order Group Id:

Email:

Username:

First Name:

Last Name:

Fulfillment Outlet:

Store:

Date:

Exception:

Escalate:

Order Type:

Order Status:

Item Status:

Payment Status:

Integration Status:

Vendor Order Number:

Vendor Invoice Number:

Tracking Number:

Product SKU:

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 Payment Service Fee	Shipping Method Description Carrier Service
Profile Name Commission	Authorize N/A	Integration Automatic Transaction Fee 0.0% of Merchandise (\$2.00 Min)

FULFILLMENT ORDER GROUP

Edit Renew Authorization Ship Finalize Cancel

Group ID	Date Created	Status	Shipping Method	Payment Status	Integration Status	Expiration Date	PO Number	Subtotal	Shipping	Sales Tax - KS 8.95%	Transaction Fee	Total
9147225	03/26/2019	Processing	Ground	Authorized	Submitted	04/02/2019	4547877G9147225 KBak	\$90.00 USD	\$6.95 USD	\$8.68 USD	\$2.00 USD	\$107.63 USD

PRODUCT CODE	SKU / U/P/C	DESCRIPTION	MSRP	WHOLESALE	UNIT	QTY	EXTENDED
Not Shipped							
110255	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

Card Type	Last 4 Digits	Exp	Auth	Cvv	Txn#	Amount
Visa	Last 4 Digits:1360	Exp: 11/2021	Avs: B	Cvv: Approved	Txn#: -5C9AA4A2B8...	\$1.00 USD
	03/26/2019 04:16 PM MDT		Authorization	Approved		\$1.00 USD
	03/26/2019 04:16 PM MDT		Void	Approved		\$1.00 USD
Visa	Last 4 Digits:1360	Exp: 11/2021	Avs: B	Cvv: Approved	Txn#: -5C9AA50277...	\$107.63 USD
	03/26/2019 04:17 PM MDT		Authorization	Approved		\$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

The screenshot shows the ExpertVoice Admin interface. At the top, there's a navigation bar with 'ExpertVoice' logo and a search bar. Below that, there are tabs for 'Organizations', 'Members', 'Site Content', 'External Content', 'Orders', 'Reports', 'Preferences', 'Marketing', and 'Integration'. The 'Orders' tab is selected. The main content area is titled 'ORDER SUMMARY' and shows 'Order Information'. There are three buttons highlighted with red boxes: 'Comment', 'Set Exception', and 'Escalate to Finance'. Below these buttons, there are sections for 'GENERAL', 'PAYMENT', and 'SHIPPING ADDRESS'. The 'GENERAL' section includes fields for Order Id, Order Date, Status, Sold By, Shipped By, Order Type, Vendor Program ID, and Team. The 'PAYMENT' section includes fields for Fulfillment Outlet, Currency, Payment Authorize, and Payment Service Fee. The 'SHIPPING ADDRESS' section includes fields for Shipping Method, Description, Carrier, and Service. Below these sections, there is a 'FULFILLMENT ORDER GROUP' section with buttons for 'Edit', 'Renew Authorization', 'Ship', 'Finalize', and 'Cancel'. This section includes fields for Group ID, Date Created, Date Completed, Status, Shipping Method, Payment Status, Integration Status, Expiration Date, PO Number, Subtotal, Shipping, Sales Tax, and Transaction Fee. At the bottom, there is a table for 'PRODUCT CODE' with columns for sku / UPC, DESCRIPTION, MSRP, WHOLESALE, UNIT, QTY, and EXTENDED. The table shows one row for 'Not Shipped' with a product code of 110288 and a description of 'Ghost 11 Color: Ebony/Grey/Silver Size: 11.5 Width: Reg'.



# Navigating Admin

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

To confirm card authorized, look here

To confirm payment was captured, look here

Transactions and History

PAYMENT TRANSACTIONS

Card Type	Last 4 Digits	Exp:	Avs:	Cvv:	Txn#
Mastercard	6317	12/2023	B		:5C9A57DA60...
		03/26/2019 10:48 AM MDT	Authorization	Approved	\$1.00 USD
		03/26/2019 10:49 AM MDT	Void	Approved	\$1.00 USD
Mastercard	6317	12/2023	B		:5C9A583E9F...
		03/26/2019 10:50 AM MDT	Authorization	Approved	\$208.93 USD
		03/26/2019 04:44 PM MDT	Capture	Approved	\$208.93 USD

STATUS HISTORY

UPDATED	UPDATED BY	STATUS	COMMENT
03/26/2019 10:49:21 AM	System Admin	New	Order ready for processing.
03/26/2019 10:49:22 AM	System Admin	Processing	Processed for submittal to manufacturer.
03/26/2019 10:50:06 AM	System Admin	Processing	Payment was authorized for \$208.93 USD.
03/26/2019 10:50:10 AM	System Admin	Processing	Order submitted to manufacturer by system process.
03/26/2019 03:12:32 PM	System Admin	Processing	Order acknowledged by manufacturer. Shipment currently scheduled for 03/26/2019
03/26/2019 04:39:24 PM	System Admin	Processing	Shipped Date: 03/26/2019 PO Number: 4547158G9146626 Shipped To: 1650 Gemini Pl COLUMBUS, OH 43240-7000 US  Tracking Number: 481406230984 Quantity: 1 UPC:753759157739 SKU:753759157739
03/26/2019 04:39:24 PM	System Admin	Processing	Shipping complete
03/26/2019 04:44:24 PM	System Admin	Processing	Re-authorize payment succeeded
03/26/2019 04:44:25 PM	System Admin	Processed	Authorization was captured for \$208.93 USD.
03/26/2019 04:44:25 PM	System Admin	Processed	Group: 9146626 All shipped email sent. Authorization was captured for \$208.93 USD.

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

When in doubt, contact your CS partner!



# Navigating Admin

## \*Only If Shipping Across Deals is enabled\*

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

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

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

**When in doubt, contact your CS partner!**

**ORDER SUMMARY**

Order Information

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

**GENERAL**

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

Status: Processed

Sold By: Experticity

Shipped By: Garmin

Name: **Abimed Center**

Email: [REDACTED]

Order Type: Retail EPP

Store: Experts-Only Pricing - Standard

Guidelines Version: 43909

Buyer: Recreational Equipment Inc - REI

Location: DC - Washington

Team: Recreational Equipment Inc - REI Retail Employees

Profile Name: Retail EPP

Commission: 8.0% of Merchandise

**PAYMENT**

Payment Method: PayPal [REDACTED]

Payment Service Fee: N/A

**SHIPPING ADDRESS**

Abimed Center, Colle  
APT 304  
College Park, MD 20740  
US

Shipping Method: Free Shipping

Carrier: FedEx Ground

Service: Ground

Shipping Shown: \$0.00 USD

Integration: Automatic garmin

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

Drop files here to upload

**FULFILLMENT ORDER GROUP**

Edit | Return

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

PRODUCT CODE	SKU   UPC	DESCRIPTION	MSRP	WHOLESALE	UNIT	QTY	EXTENDED
Shipment #1 08/09/2024 Edit Tracking # 1Z66527X03348471190							
010-02562-00	010-02562-00 763759279608	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

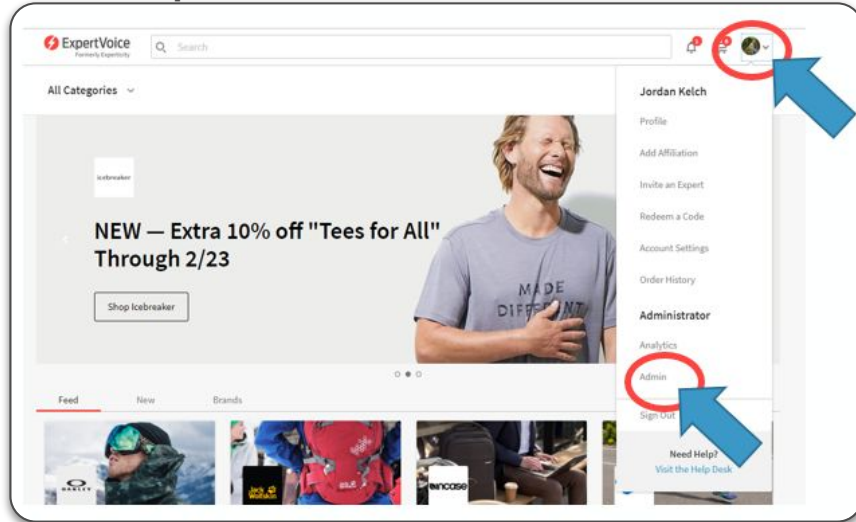
Manual

# Processing Orders 101

Follow these steps

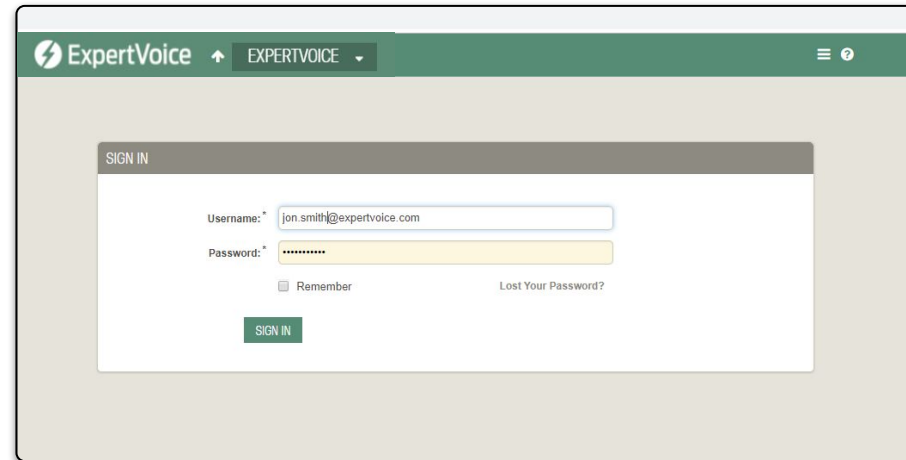
## 1. Login:

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**

ExpertVoice EXPERTVOICE

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

Orders to Fulfill  
Members' Orders

### ORDERS TO FULFILL

Search and manage orders placed for

#### SEARCH ORDERS

Order Id(s):

Order Group Id:

Email:

Username:

First Name:

Last Name:

Fulfillment Outlet:

Store:

Date:

Exception:

Escalate:

Order Type:

Order Status:

Item Status:

Payment Status:

Integration Status:

SUBMIT CLEAR

#### Orders

	ORDER ID	DATE	ORDER TYPE	BUYING COMPANY	MEMBER	ORDER STATUS
	4553457	03/29/2019	Retail EPP			New

Export as: CSV EXCEL



# Processing Orders 101

Follow these steps

## 3. Process Order:

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

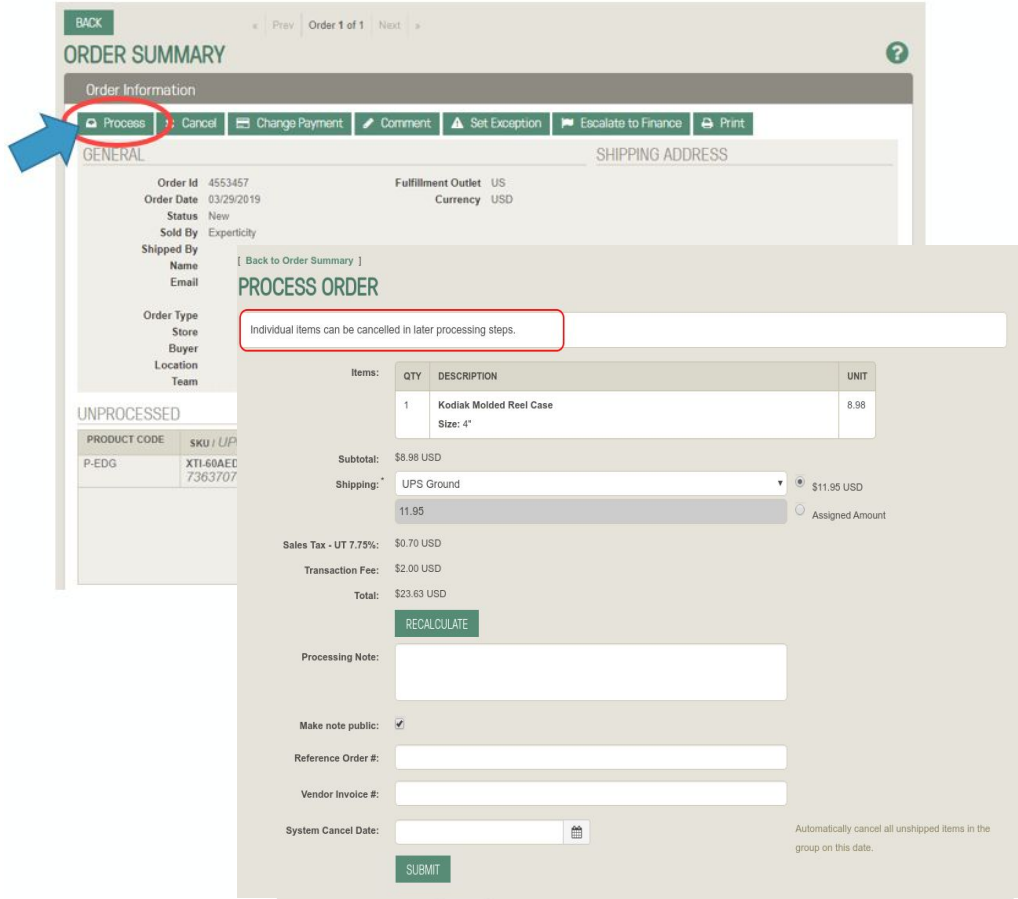
Click “**Process**,”

\*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**



ORDER SUMMARY

Order Information

Process Cancel Change Payment Comment Set Exception Escalate to Finance Print

GENERAL SHIPPING ADDRESS

Order Id 4553457 Fulfillment Outlet US  
Order Date 03/29/2019 Currency USD  
Status New  
Sold By Experticity  
Shipped By Name  
Email  
Order Type  
Store  
Buyer  
Location  
Team

UNPROCESSED

PRODUCT CODE	SKU / UP
P-EDG	XTL-60AEC 7363707

PROCESS ORDER

Individual items can be cancelled in later processing steps.

ITEMS	QTY	DESCRIPTION	UNIT
	1	Kodak Molded Reel Case Size: 4"	8.98

Subtotal: \$8.98 USD  
Shipping: UPS Ground \$11.95 USD  
Sales Tax - UT 7.75%: \$0.70 USD  
Transaction Fee: \$2.00 USD  
Total: \$23.63 USD

RECALCULATE

Processing Note:

Make note public:

Reference Order #:

Vendor Invoice #:

System Cancel Date:

Automatically cancel all unshipped items in the group on this date.

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**

**ORDER SUMMARY**

Order Information

Process Cancel Change Payment Comment Set Exception Escalate to Finance Print

**GENERAL** **SHIPPING ADDRESS**

Order Id 4550145 Fulfillment Outlet US  
Order Date 03/28/2019 Currency USD  
Status Processing  
Sold By Experticity  
Shipped By  
Name  
Email  
Shipping Method Standard Shipping  
Order Type Carrier UPS  
Store Service Ground  
Buyer  
Location ON - Ottawa  
Team Cabela's - CAN Retail Emp

**FULLFILLMENT ORDER GROUP**

Edit Renew Authorization **Ship** Finalize Cancel

Group ID 9153034 Payment Status Authorized Subtotal \$22.49 USD  
Date Created 03/28/2019 Expiration Date 04/04/2019 Shipping \$5.00 USD  
ler # 1134125 Transaction Fee \$2.00 USD  
Total \$29.49 USD

MSRP	WHOLESALE	UNIT	QTY	EXTENDED
44.99	22.49	22.49	1	22.49

**SHIP ITEMS**

Please select the items to ship:

Select Items: FulfillQty Description  
 1 Piranta EDGE  
Color: Blaze Orange GRIP COLOR: Black

Shipping:  \$5.00 USD Assigned Amount  
 \$5.00 USD Standard Shipping  
 Amount for this shipment

RECALCULATE

Shipment Date: 03/29/2019

Reference Order #: 1134125

Vendor Invoice #:

Tracking #: INPUT TRACKING NUMBER HERE

Shipping Carrier: UPS

Shipping Carrier Service: Ground

Finalize Group:

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 « Prev Order 1 of 11 Next »

ORDER INFORMATION

Change Payment Comment Escalate to Finance Print

GENERAL

Order ID: 4535235 Fulfillment Outlet: US  
Order Date: 03/20/2019 Currency: USD  
Status: Processed  
Sold By: Expertise  
Shipped By: Name: Expertise-Only Pricing - Pro  
Email: Team: 888A.Members

SHIPPING ADDRESS

Shipping Method: Free Shipping Over \$50 (Lower 48)  
Description: US Postal Service  
Carrier: Standard Service  
Service: Standard Service

FULFILLMENT ORDER GROUP

Group ID	Payment Status	Charged	Subtotal
9100758	Submitted		\$44.90 USD
03/20/2019	Submitted		Shipping \$5.00 USD
03/20/2019	Submitted		Shipping \$4.47 USD
03/20/2019	Submitted		Sales Tax - AB 8.0% \$2.00 USD
03/20/2019	Submitted		Transaction Fee \$5.97 USD
03/20/2019	Submitted		Total \$55.97 USD

Payment \$55.97 USD  
Payment Fee --  
Commission \*\* \$8.00 USD  
Due Vendor \$42.92 USD  
\*\* 15.0% of Merchandise

PRODUCT CODE	SKU / UPC	DESCRIPTION	MSRP	WHOLESALE	UNIT	QTY	EXTENDED
EMPAQ #1 03/25/2019 6.88		US Postal Service - Standard Service					
Tracking # 6274836001744208983079							
TRAILHEAD_PANTS	TRAILHEAD_BROWN_SMALL_RELAXED	TRAILHEAD PANTS Color: Brown Size: Small	\$9.00	\$9.00	44.90	1	44.90

Transactions and History

PAYMENT TRANSACTIONS

Visa	Last 4 Digits:1902 Exp: 12/2023	Avs: F	Cvv:	Txn#	Amount
	03/20/2019 07:56 AM MDT	Authorization	Approved	:5C924693EC...	\$1.00 USD
	03/20/2019 07:57 AM MDT	Void	Approved		\$1.00 USD
Visa	Last 4 Digits:1902 Exp: 12/2023	Avs: F	Cvv:	Txn# :5C925372C1...	\$55.97 USD
	03/20/2019 08:51 AM MDT	Authorization	Approved		\$55.97 USD
	03/25/2019 10:59 AM MDT	Capture	Approved		\$55.97 USD

Transactions and History

PAYMENT TRANSACTIONS

Visa	Last 4 Digits:1902 Exp: 12/2023	Avs: F	Cvv:	Txn#	Amount
	03/20/2019 07:56 AM MDT	Authorization	Approved	:5C924693EC...	\$1.00 USD
	03/20/2019 07:57 AM MDT	Void	Approved		\$1.00 USD
Visa	Last 4 Digits:1902 Exp: 12/2023	Avs: F	Cvv:	Txn# :5C925372C1...	\$55.97 USD
	03/20/2019 08:51 AM MDT	Authorization	Approved		\$55.97 USD
	03/25/2019 10:59 AM MDT	Capture	Approved		\$55.97 USD

Escalate to Finance Comment



# 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.

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 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	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

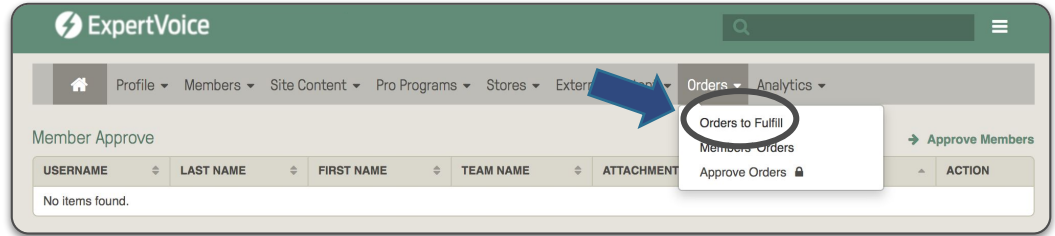
## 1. Orders to reauthorize:

**\*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**



The screenshot shows the 'ORDERS TO FULFILL' search form. The title is 'ORDERS TO FULFILL' and the subtitle is 'Search and manage orders placed for Sanuk products'. Below the title is the section 'SEARCH ORDERS'. The 'Order Id(s):' field is circled in black. Other fields include 'Order Group Id:', 'Email:', 'Username:', 'First Name:', 'Last Name:', 'Fulfillment Outlet:' (dropdown), 'Store:' (dropdown), 'Date:' (calendar), and 'Exception:' (dropdown).

The screenshot shows the 'Orders' table. The table has columns: ORDER ID, DATE, ORDER TYPE, BUYING COMPANY, MEMBER, and ORDER STATUS. The first row is circled in black, and a blue arrow points to it. Below the table, there are 'Export as:' buttons for 'CSV' and 'EXCEL'.

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



# 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 'ExpertVoice' and 'EXPERTVOICE'. Below it, there are tabs for 'Organizations', 'Members', 'Site Content', 'External Content', 'Orders', 'Reports', 'Preferences', 'Marketing', and 'Integration'. The main content area shows the 'ORDER SUMMARY' for 'Order 4 of 500'. The 'ORDER SUMMARY' is divided into 'GENERAL', 'PAYMENT', and 'SHIPPING ADDRESS' sections. The 'GENERAL' section contains order details such as Order Id (4535821), Order Date (03/20/2019), Status (Processing), and Sold By (Expertichy). The 'FULFILLMENT ORDER GROUP' section is highlighted, and the 'Renew Authorization' button is circled. A blue arrow points from this button to the 'RENEW AUTHORIZATION ORDER ACTION' dialog. The dialog shows the 'Credit Card' amount as '\$91.90 USD' and includes a 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 dialog, there are 'AUTHORIZE' and 'CANCEL' buttons. Another blue arrow points from the 'Authorize' button in the dialog to the 'AUTHORIZE' button at the bottom of the dialog.

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 10:50:00 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

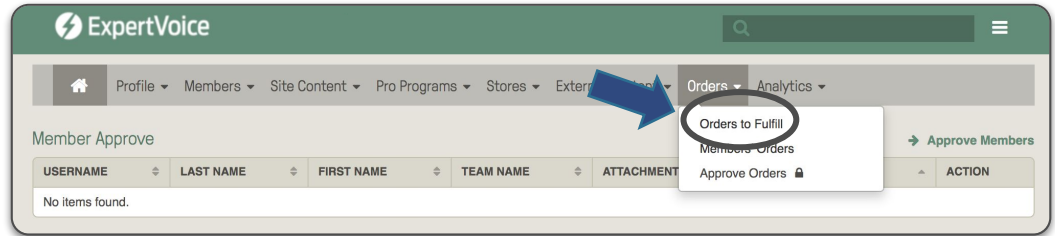
Follow these steps

## 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**



The screenshot shows the 'ORDERS TO FULFILL' search form. The 'Order Id(s)' field is circled in red. 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. The first row is circled in red, and a blue arrow points to it. The table has columns for ORDER ID, DATE, ORDER TYPE, BUYING COMPANY, MEMBER, and ORDER STATUS.

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





# 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”**

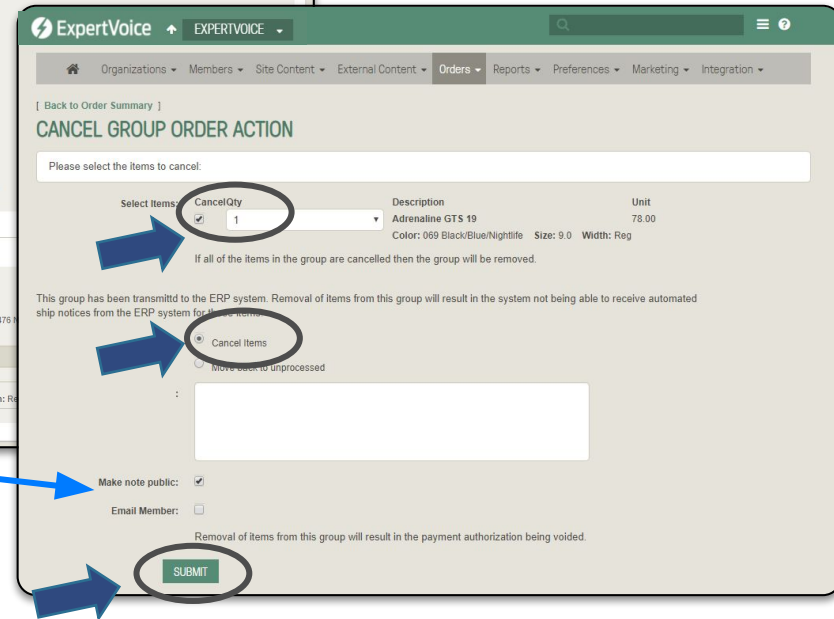
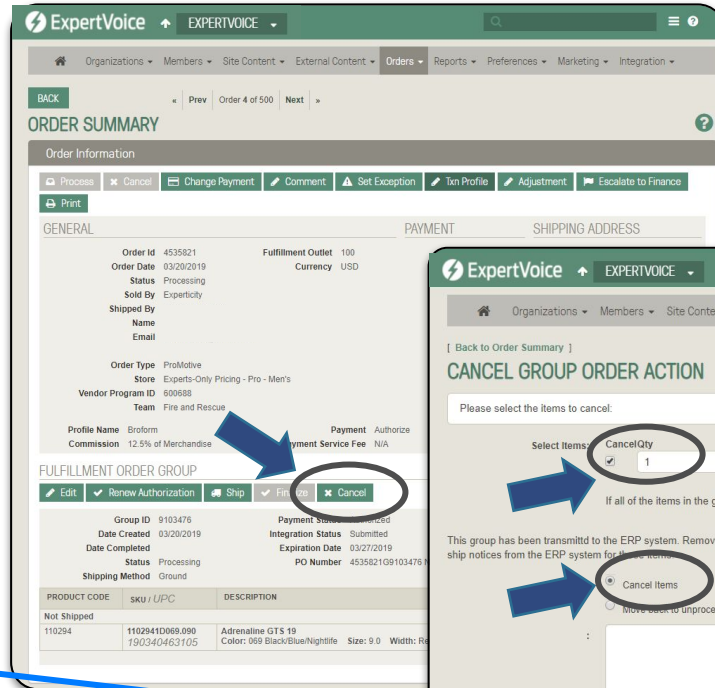
Input a comment if desired

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.

The screenshot shows the ExpertVoice interface. The top navigation bar includes 'ExpertVoice', 'EXPERTVOICE', and a search icon. Below the navigation bar, there are tabs for 'Profile', 'Members', 'Site Content', 'Pro Programs', 'Stores', 'External Content', 'Orders', and 'Analytics'. The main content area is titled 'ORDER SUMMARY' and contains 'Order Information' and 'FULFILLMENT ORDER' sections. The 'ORDER SUMMARY' section includes buttons for 'Change Payment', 'Comment', 'Set Exception', 'Escalate to Finance', and 'Print'. The 'FULFILLMENT ORDER' section includes buttons for 'Edit' and 'Return'. The 'RETURN ORDER' section includes a table of items to be returned, a 'RECALCULATE' button, and a 'SUBMIT' button. The 'RECALCULATE' button is circled in red, and the 'SUBMIT' button is also circled in red. A blue arrow points to the 'Return' button in the 'FULFILLMENT ORDER' section. Another blue arrow points to the 'RECALCULATE' button. A third blue arrow points to the 'SUBMIT' button. A red arrow points from the 'Return' button to the 'RECALCULATE' button. Another red arrow points from the 'RECALCULATE' button to the 'SUBMIT' button. The 'Make note public' checkbox is also checked, and a blue arrow points to it.

ExpertVoice 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 03/08/2019 Fulfillment Outlet US John Doe  
Order Date 03/08/2019 Currency USD 123 Main St.  
Status Processed Seattle, WA 11111  
Sold By Experticity  
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 Coalatree Employees

FULFILLMENT ORDER

Edit Return

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

[ 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**

