

# Order Processing



# Order Processing

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

# **Order Fulfillment Manager Role & Responsibilities**

# Order Fulfillment Manager Role & Responsibilities

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

## Main Role:

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

## Best Practices:

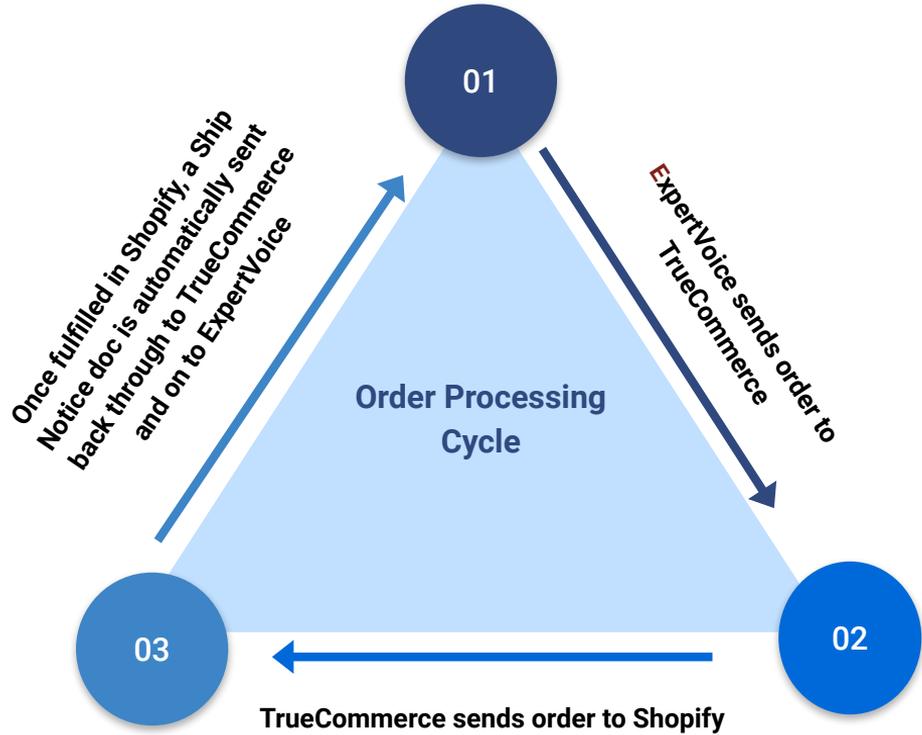
- Monitor orders via the Daily Order Summary email
- How often an OFM should be coming into the ExpertVoice admin to process orders is dependent on order volume. We recommend going in at least a couple times a week, but for high volume brands, orders should be processed on a daily basis. All orders should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



# TrueCommerce Review

# Workflow

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# Purchase Orders

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

Once a member makes a purchase(s) on Expertvoice, we generate the order that is sent to TrueCommerce and then into Shopify



# Shipping

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When the status of the order is updated to fulfilled in Shopify, it will trigger a Ship Notice document to be sent to Expertvoice. A Ship Notice will capture payment, finalize the order, and send shipment tracking information to the Expert.



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



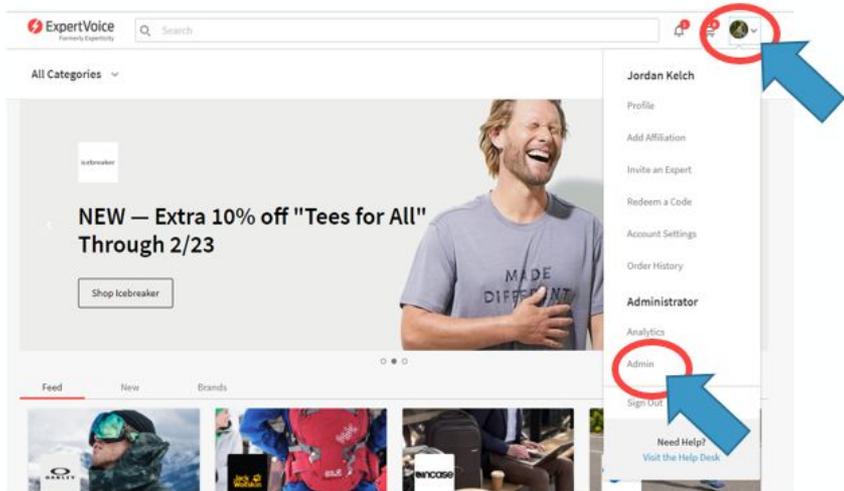
# Admin Overview

# Getting to the Admin

Follow these steps

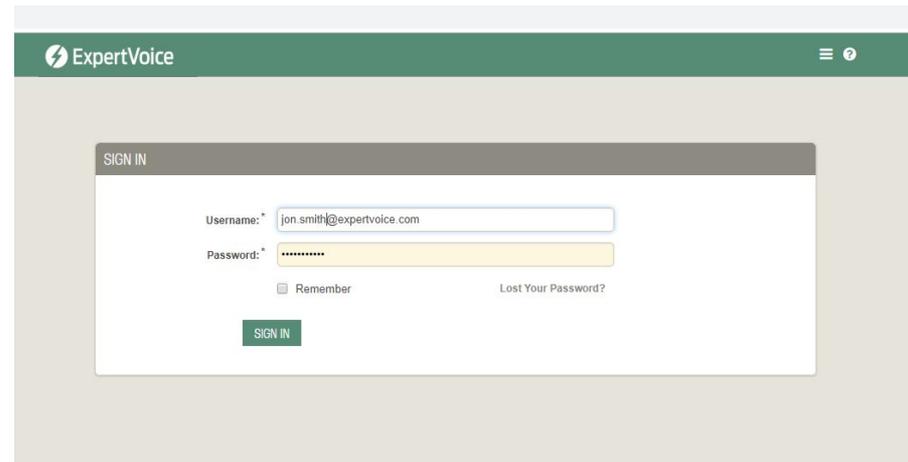
## 1. Login:

expertvoice.com



OR

admin.expertvoice.com



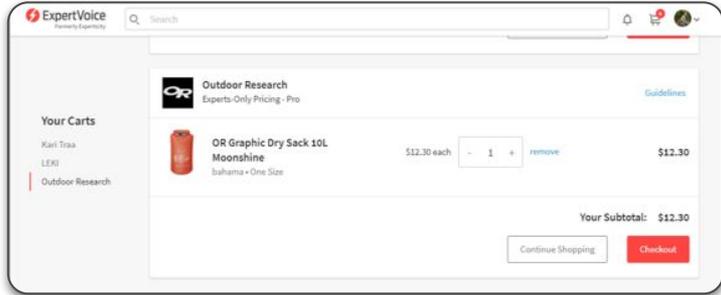
Once logged in, click the **profile drop down** in top right corner and select **“Admin”**

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



# ExpertVoice Overview

## 1. Customers place orders on ExpertVoice.com



## 2. Order sent to TrueCommerce for processing.

## 3. Brand processes orders



## 4. A Ship Notice Document is sent back to ExpertVoice and tracking information is sent to the Expert

## 5. Customer leaves awesome review



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

Orders to Fulfill  
Members' Orders  
Approve Orders

### 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:

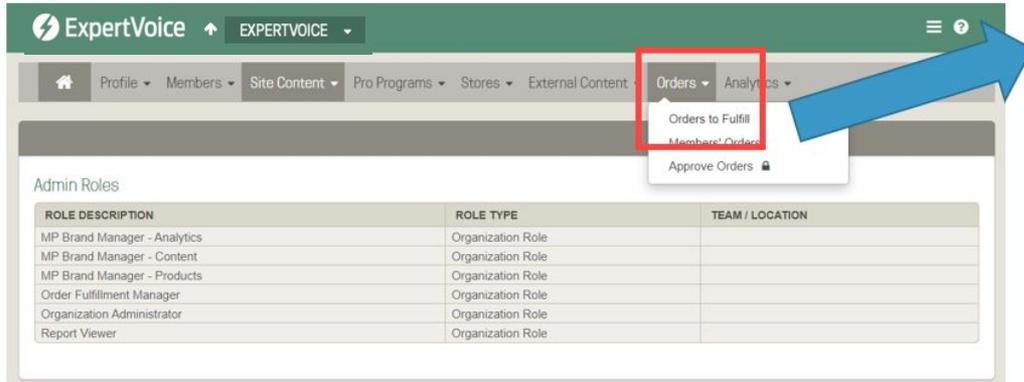
Product SKU:



# Navigating Admin

## Admin Home Screen Drop Downs

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



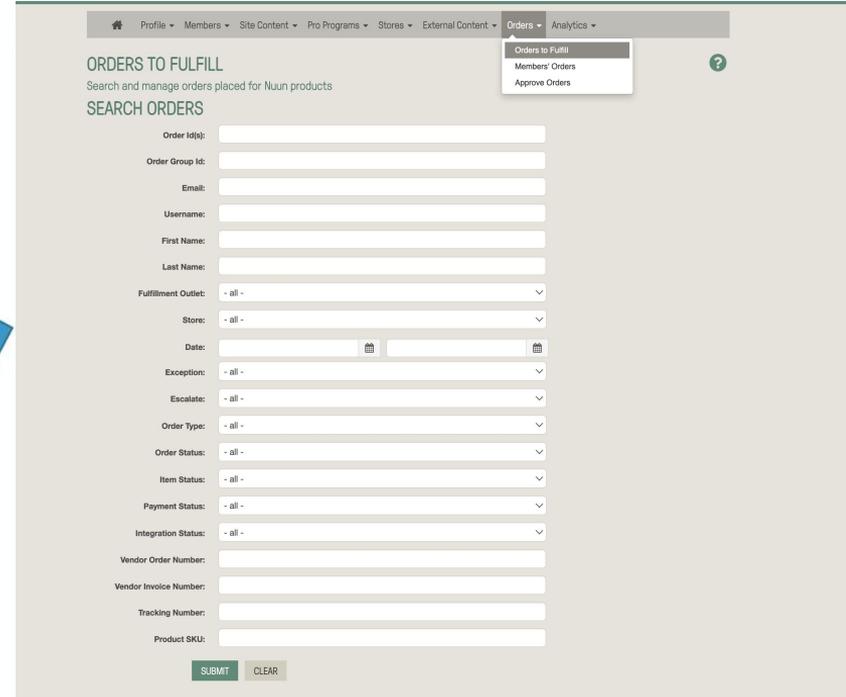
ExpertVoice EXPERTVOICE

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

Orders to Fulfill  
Members' Orders  
Approve Orders

Admin Roles

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



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

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

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### 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

U.S. Army - Military  |

Group ID  
Date Created  
Date Completed  
Status  
Shipping Method

Payment Status  
Integration Status  
Expiration Date  
PO Number

Authorized  
Submitted  
04/02/2019  
4547877G9147225 KBak

Subtotal  
Shipping  
Sales Tax - KS 8.95%  
Transaction Fee  
Total

\$90.00 USD  
\$8.95 USD  
\$8.68 USD  
\$2.00 USD  
\$107.63 USD

PRODUCT CODE	SKU / UPC	DESCRIPTION	MSRP	WHOLESALE	UNIT	QTY	EXTENDED
Not Shipped							
110268	1102881003.115 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	Cvc	Txn#
Visa	Last 4 Digits:1360	Exp: 11/2021	Ave: B Authorization	Cvc: Approved	Txn#: 35C3AA4A268...
	03/26/2019 04:16 PM MDT		Void	Approved	\$1.00 USD
Visa	Last 4 Digits:1360	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

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### 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 Order Date 03/26/2019 Status Processing Sold By Experticity Shipped By Name Email Order Type Store Vendor Program ID Team U.S. Army - Military	Fulfillment Outlet 100 Currency USD Profile Name Broform Commission 12.5% of Merchandise Payment Authorize Payment Service Fee N/A	Shipping Method Ground Description Ground Carrier FedEx Ground Service Ground Integration Automatic Transaction Fee 0.0% of Merchandise [\$2.00 Min]

#### FULFILLMENT ORDER GROUP

Edit Renew Authorization Ship Finalize Cancel

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	Subtotal \$90.00 USD Shipping \$6.95 USD Sales Tax - KS 8.95% \$8.68 USD Transaction Fee \$2.00 USD Total \$107.63 USD
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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	Authorization	Approved	:5C9A57DA60...
		03/26/2019 10:48 AM MDT	Void	Approved	\$1.00 USD
Mastercard	6317	12/2023	Authorization	Approved	:5C9A583E9F...
		03/26/2019 10:50 AM MDT	Capture	Approved	\$208.93 USD
		03/26/2019 04:44 PM MDT			\$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

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



# **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**



### 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	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 fields like Order Id, Date, Status, and Payment details. A 'FULFILLMENT ORDER GROUP' is listed with a 'Renew Authorization' button circled in red. A blue arrow points from this button to a 'RENEW AUTHORIZATION ORDER ACTION' dialog box. The dialog box 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 dialog 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

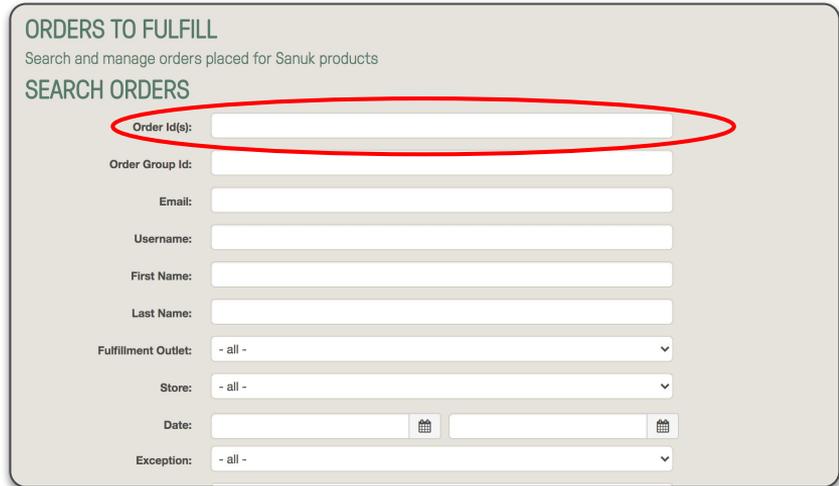
Profile Members Site Content Pro Programs Stores External Links **Orders** Analytics

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 displays two screenshots from the ExpertVoice system. The first screenshot shows the 'ORDER SUMMARY' screen. In the 'FULFILLMENT ORDER GROUP' section, the 'Cancel' button is highlighted with a red circle and a blue arrow. The second screenshot shows the 'CANCEL GROUP ORDER ACTION' screen. In this screen, the 'Cancel Qty' dropdown is set to 1, 'Cancel Items' is selected, and the 'SUBMIT' button is highlighted with a red circle and a blue arrow. Blue arrows also point from the text instructions to the 'Make note public' and 'Email Member' checkboxes.





# 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

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### 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**

