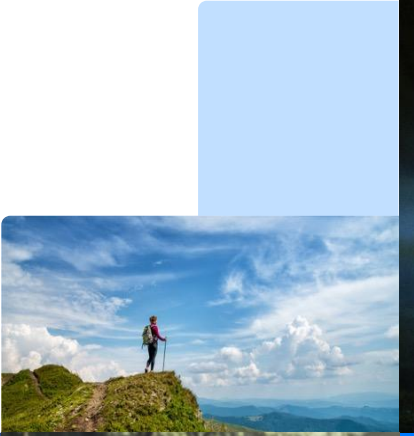
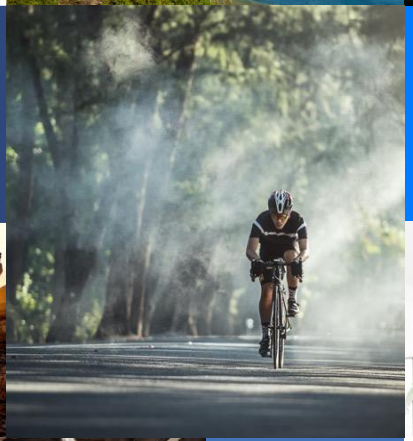
ExpertVoice

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:

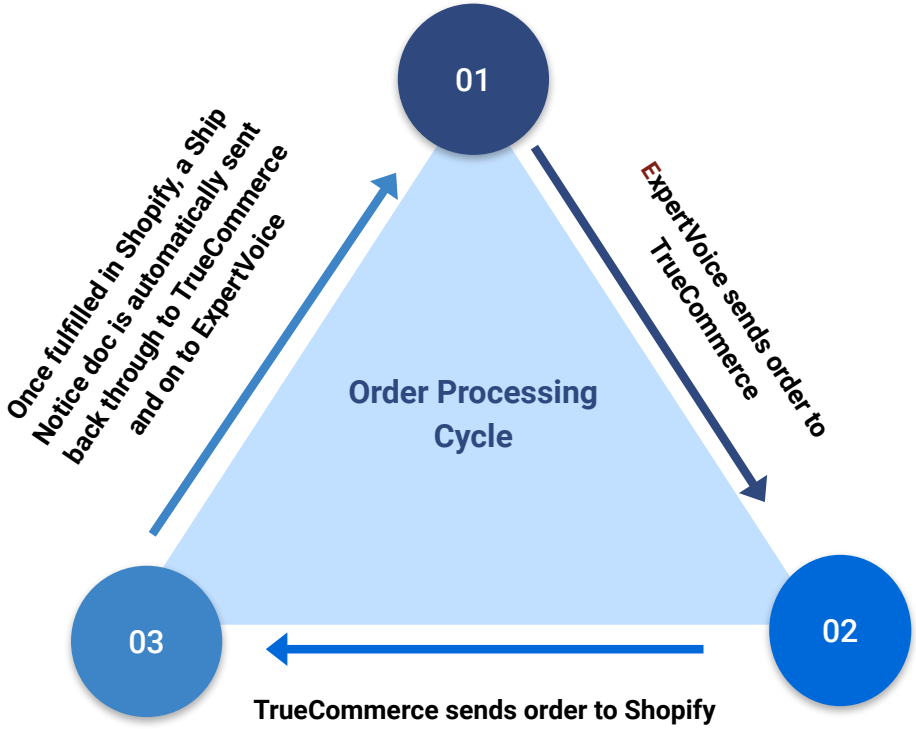
- Receive and fulfill orders in a timely, efficient manner
- Keep inventory levels up to date
- Responsible for processing refunds and cancellations as needed
- Assist with customer service questions either directly from the expert or ExpertVoice's Expert Support team
- Work with the Customer Success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

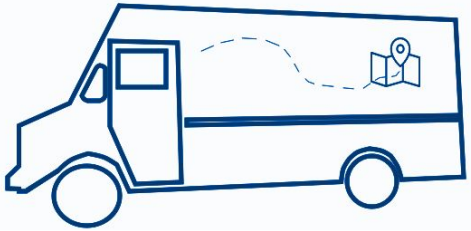

01
02
03
Order Processing Cycle
ExpertVoice sends order to TrueCommerce
TrueCommerce sends order to Shopify
Once fulfilled in Shopify, a Ship Notice doc is automatically sent back through to TrueCommerce and on to ExpertVoice

Purchase Orders

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



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)*!**

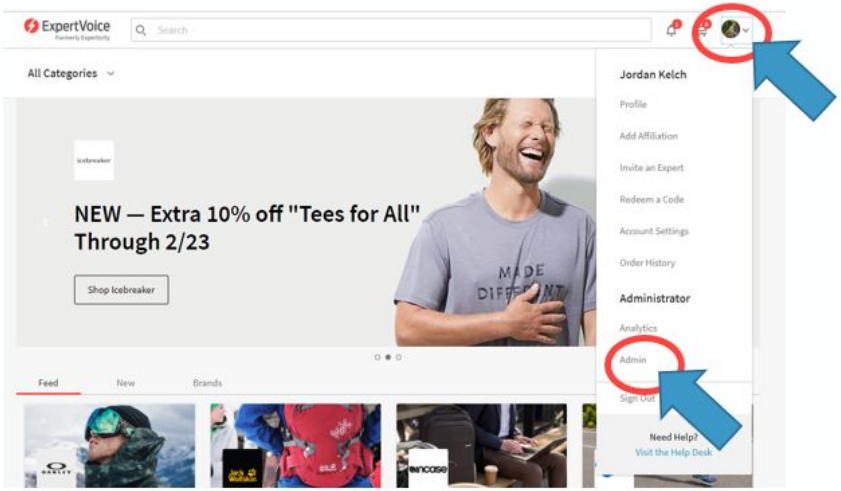
Admin Overview

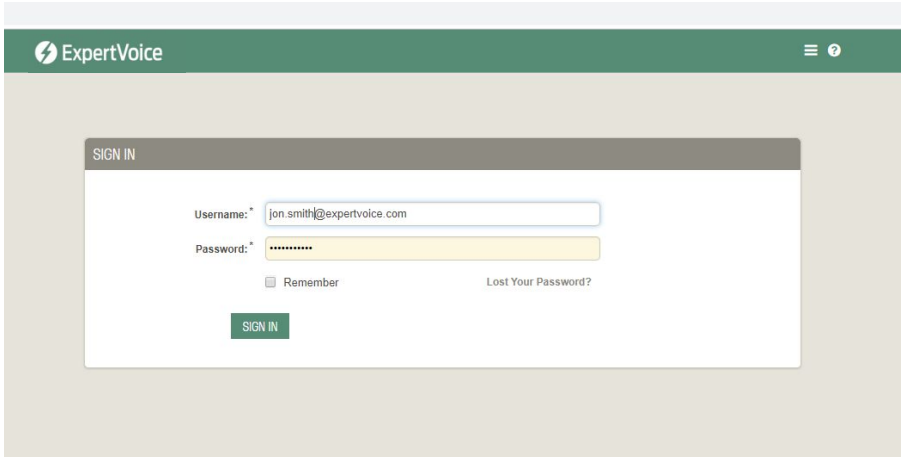
Getting to the Admin

Follow these steps

1. **Login:**

expertvoice.com **OR** **admin.expertvoice.com**



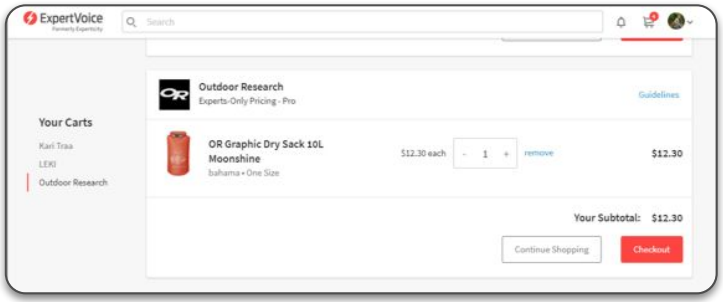


Once logged in, click the **profile drop down** in top right corner and select "**Admin**"

Pro Tip: Bookmark the Admin page in your web browser

ExpertVoice Overview

1. Customers place orders on ExpertVoice.com

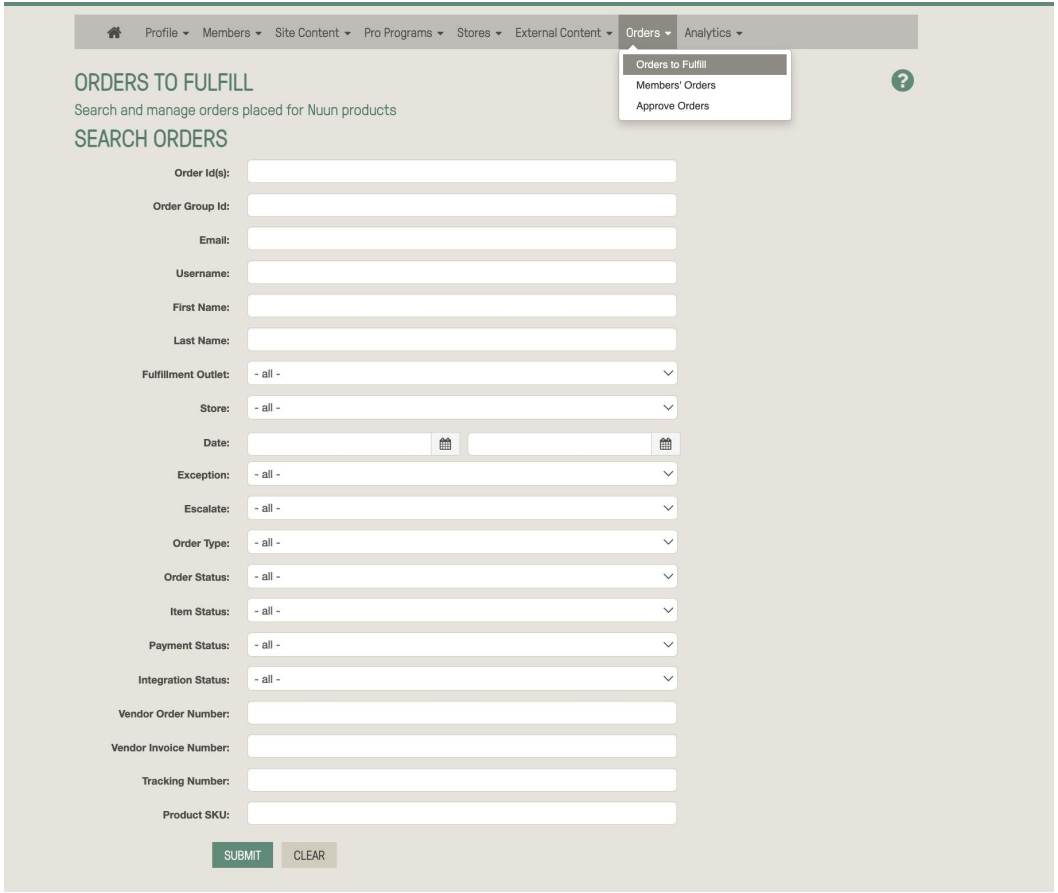


2. Order sent to TrueCommerce for processing.

3. Brand processes orders

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

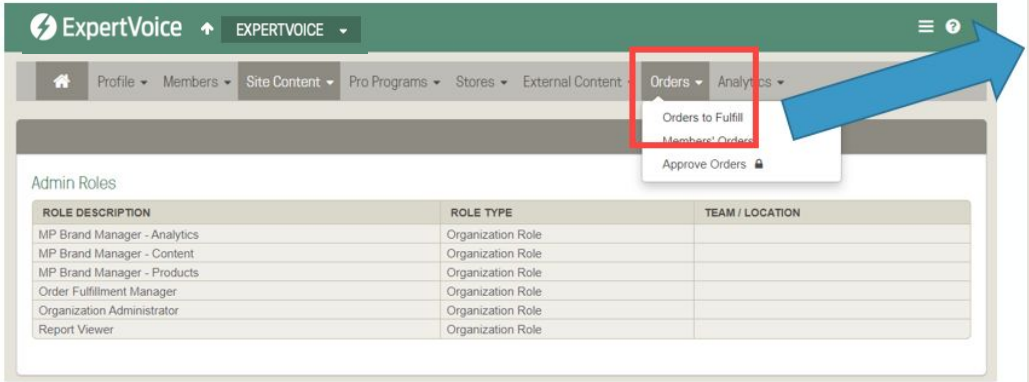
5. Customer leaves awesome review

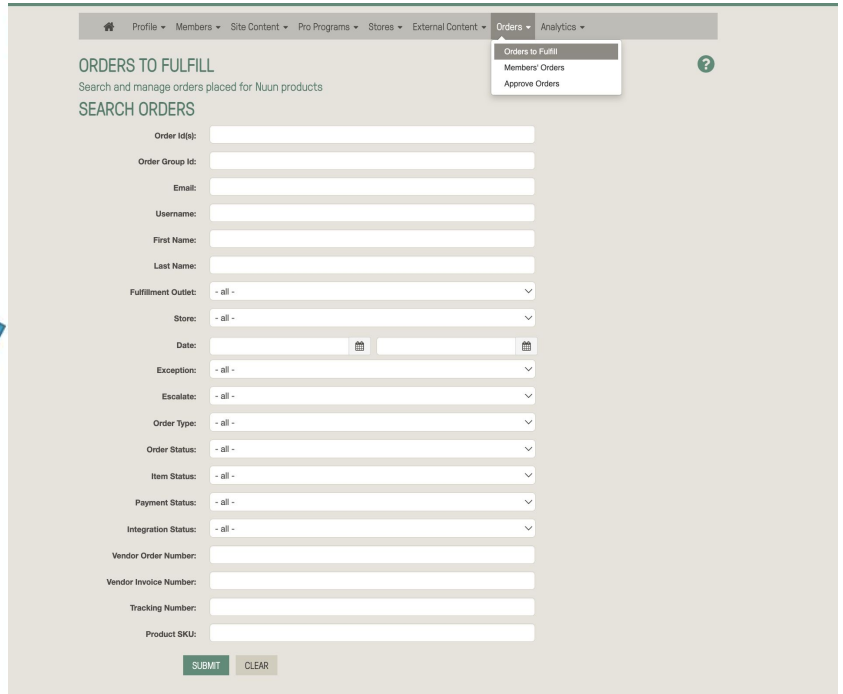


Navigating Admin

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

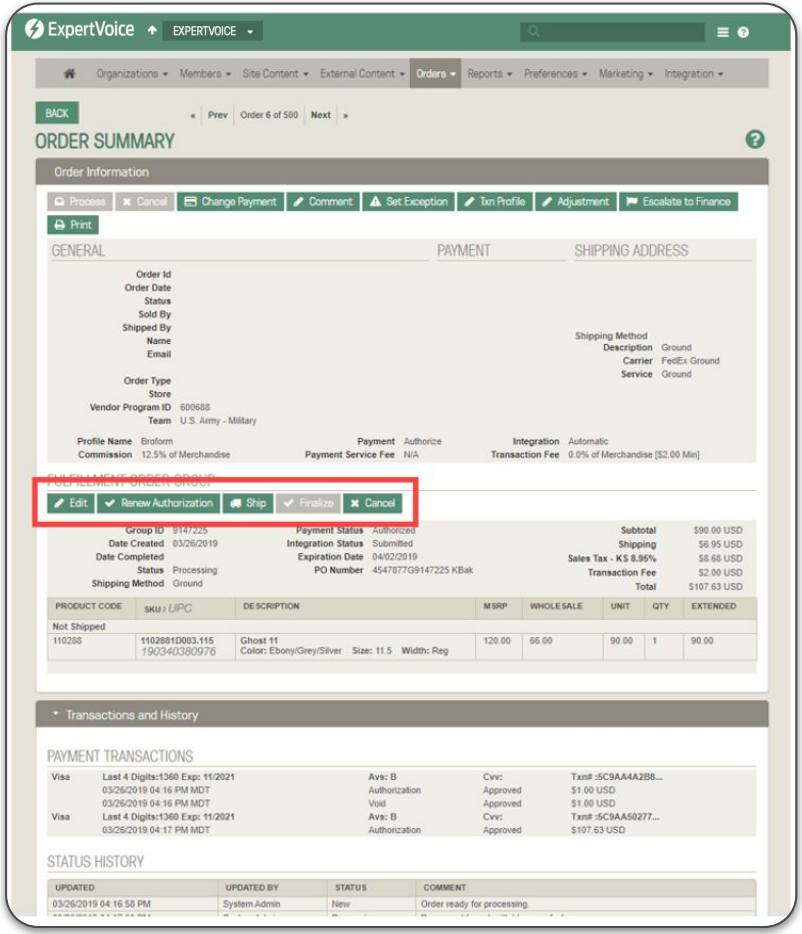
Click **Ship** to manually ship the order, this is where you will input the tracking number if applicable. More explanation to come.

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.

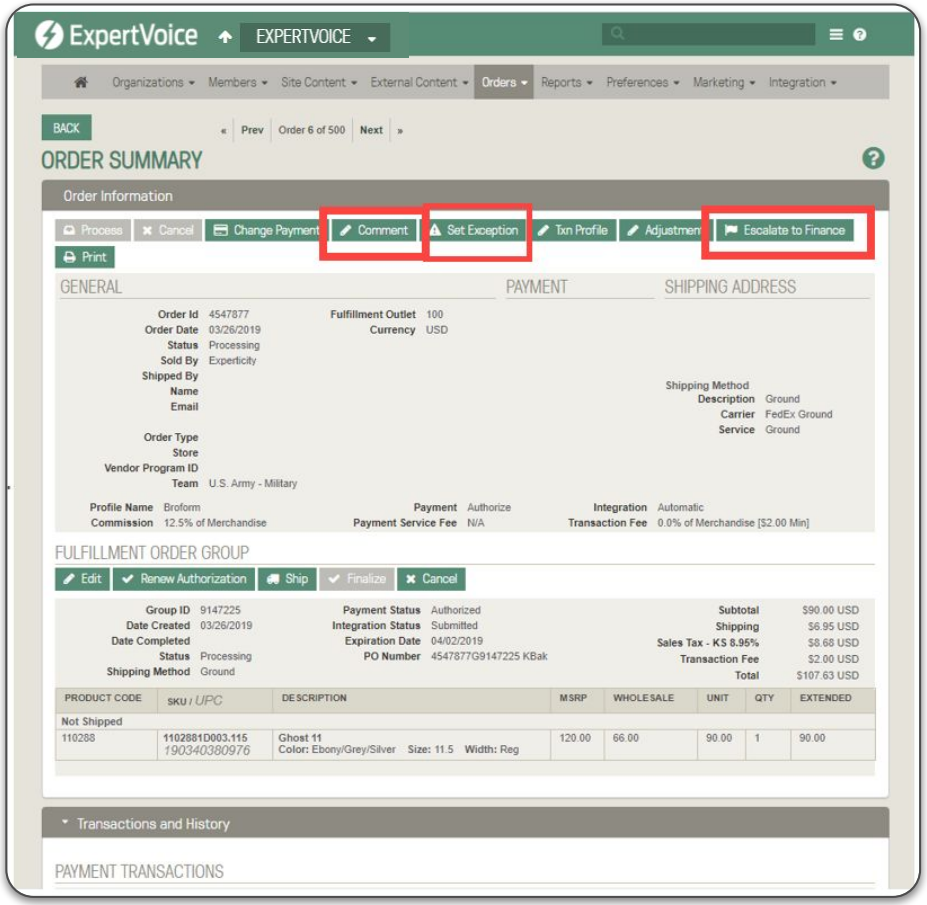
Escalate to Finance

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



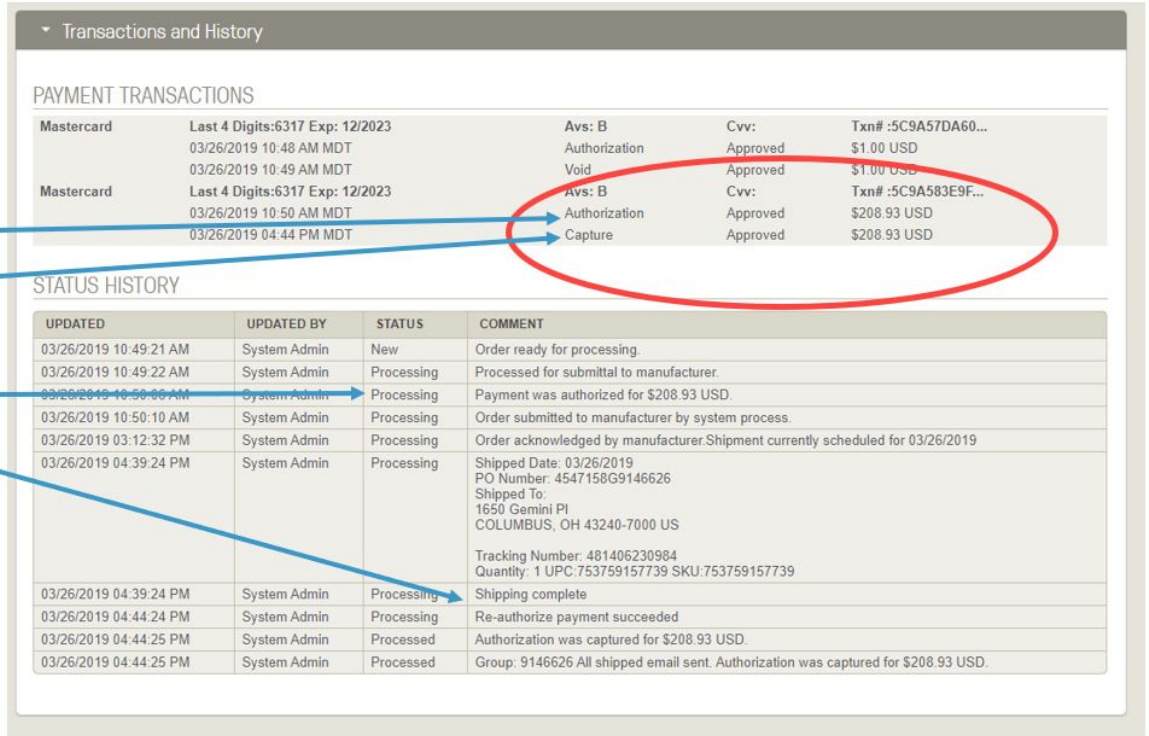
Navigating Admin

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

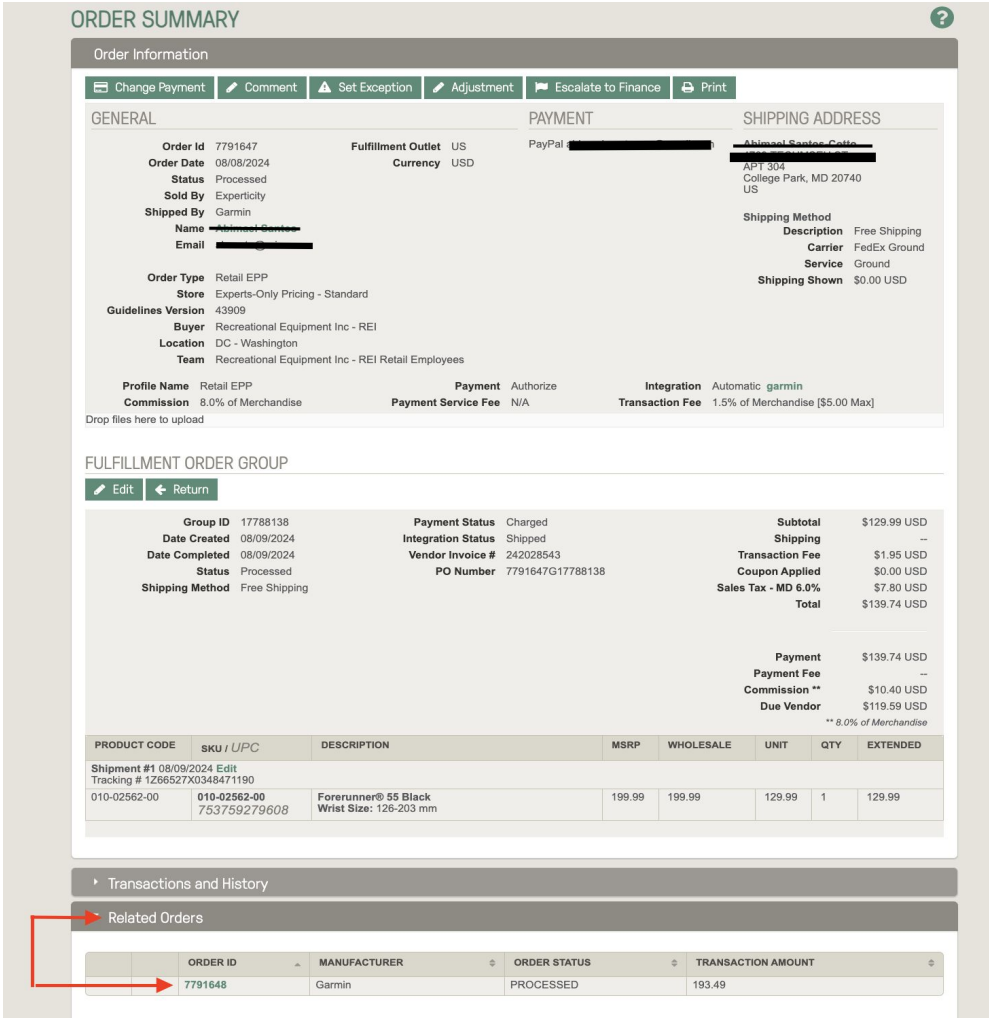
Only If Shipping Across Deals is enabled

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!



How to Renew an Expired Credit Card Authorization

How to Renew an Expired Credit Card Authorization

Follow these steps

1. Orders to reauthorize:

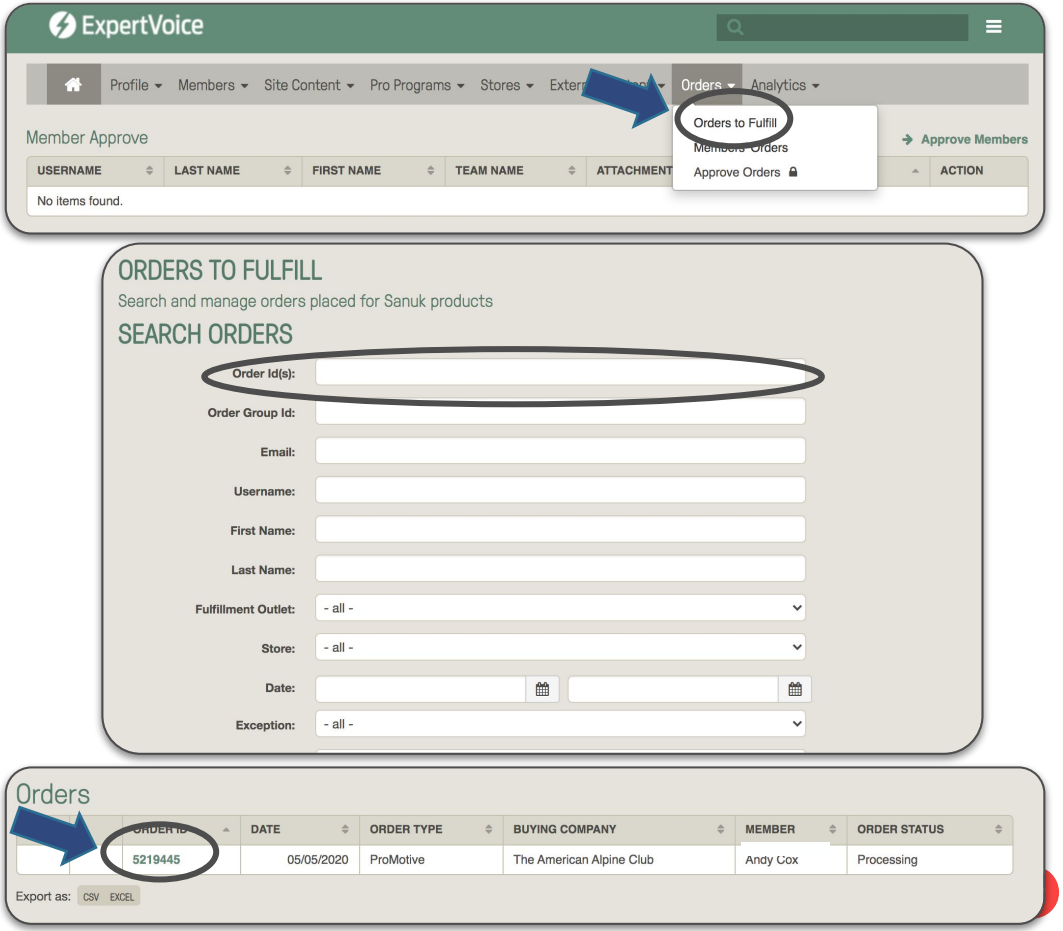
The **Daily Order Email** will identify which orders have expired authorizations and need to be renewed.

***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

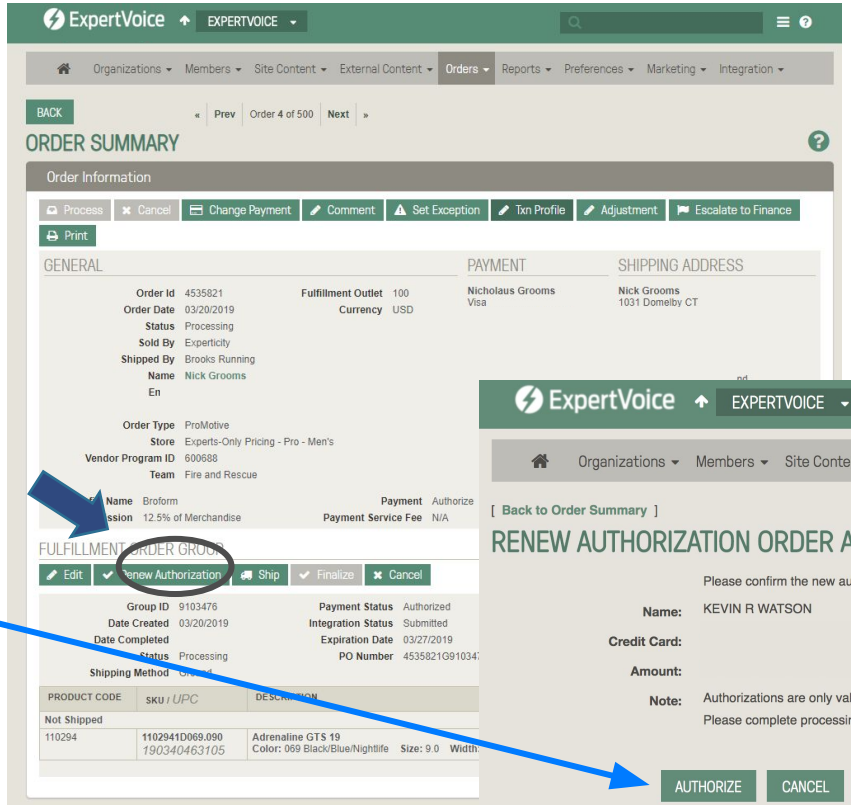
2. Reauthorizing an Order:

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

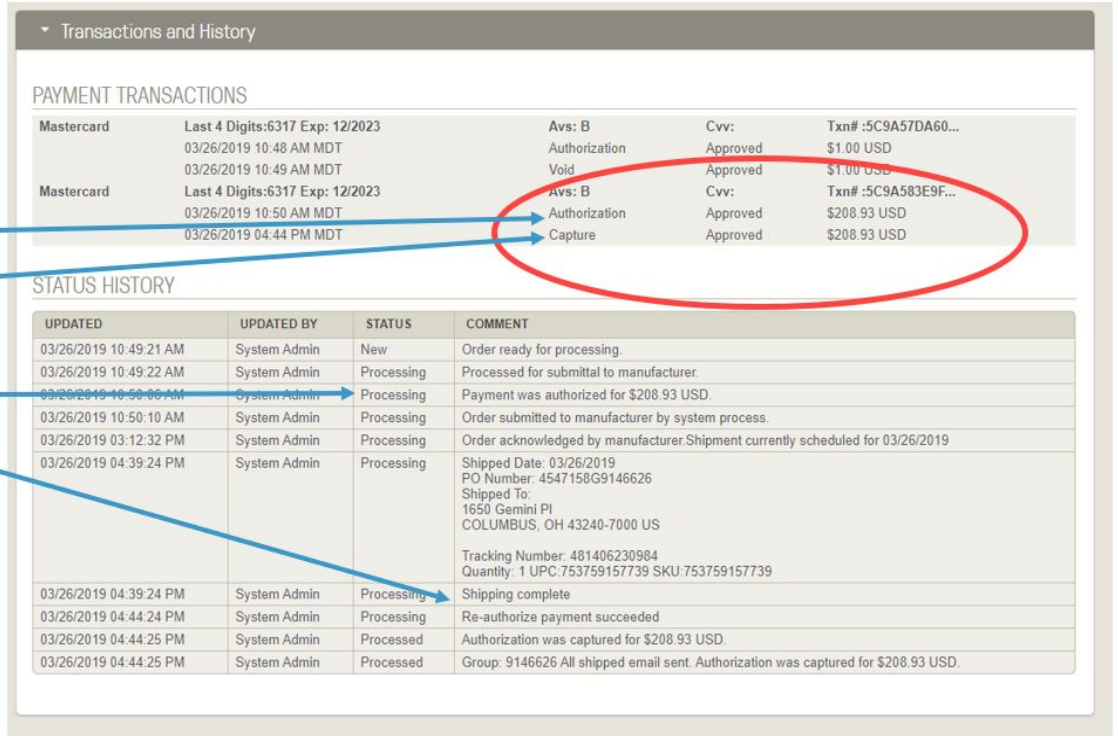
Follow these steps

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!



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[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

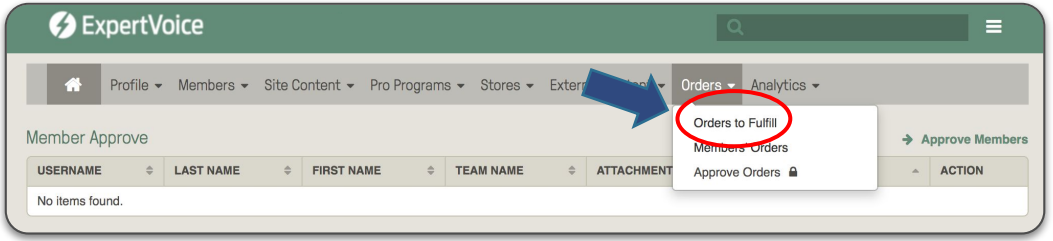
Follow these steps

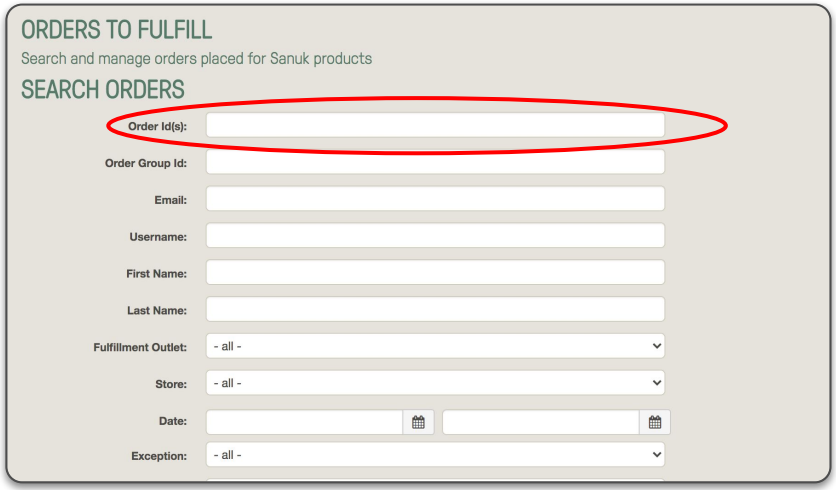
1. Orders to Cancel or Refund:

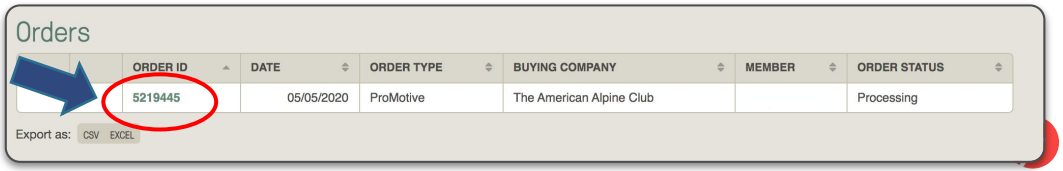
From the home screen, click the "**Orders**" dropdown, select "**Orders to Fulfill**"

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:

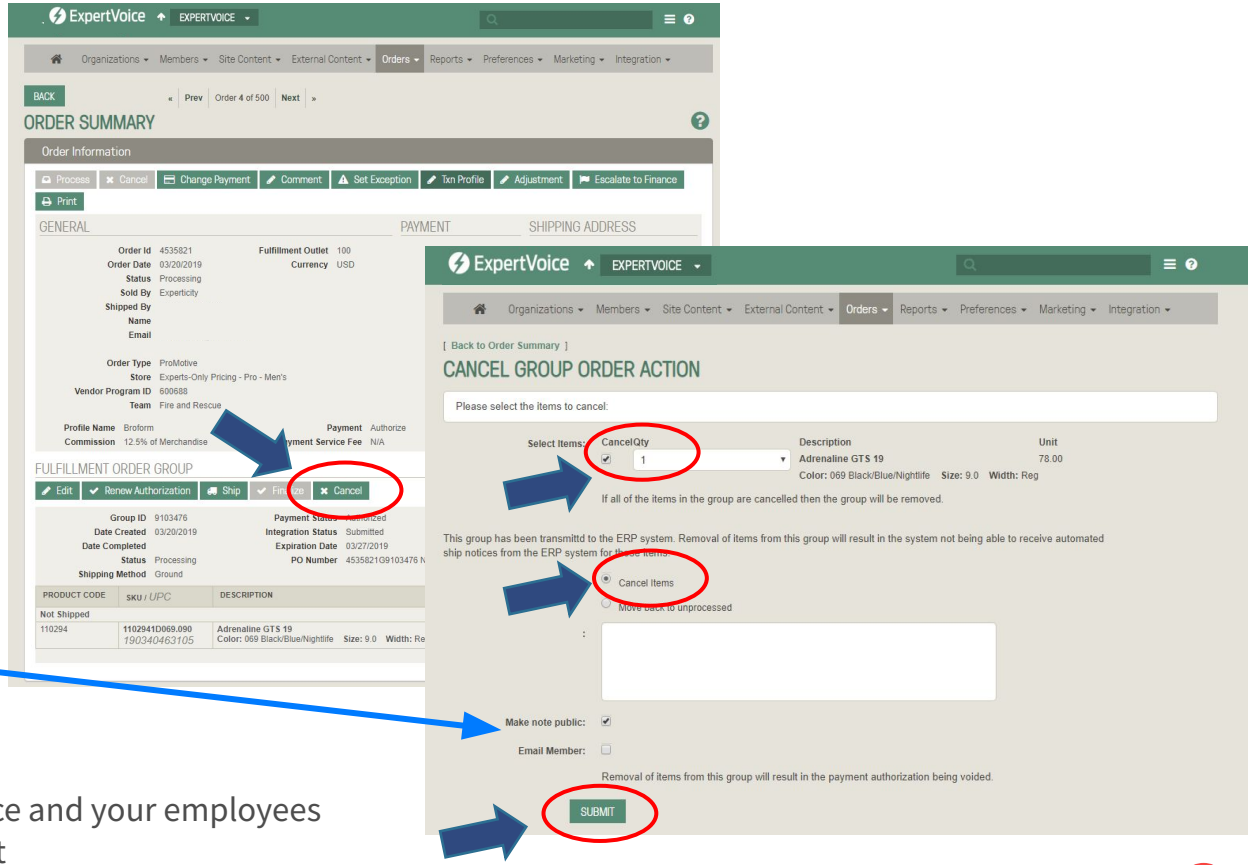
From the Order Summary screen:

- 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

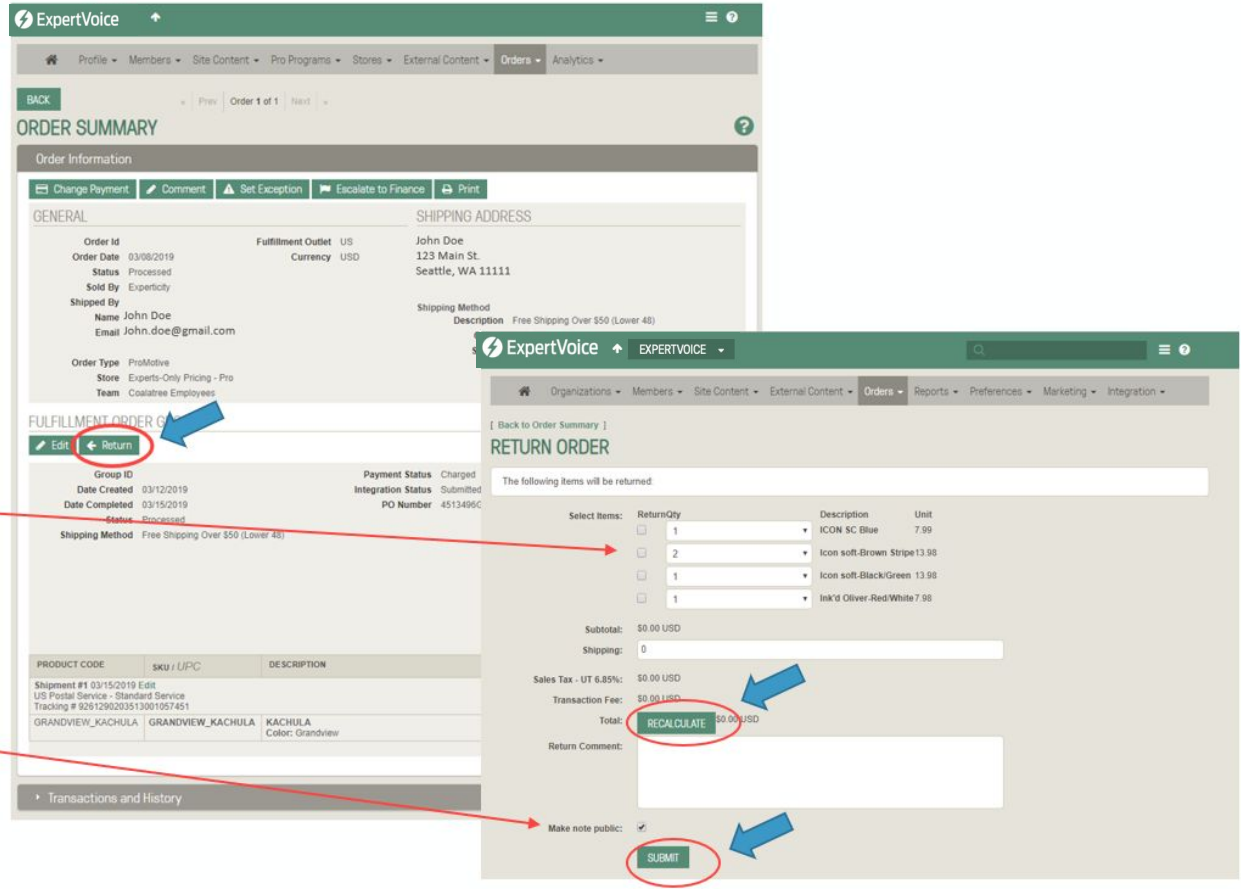
3. Refund/Return:

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.