



Manual Order Processing

A guide to the Advocacy Platform's all-in-one fulfillment manager.

Order processing

The importance of timely & accurate fulfillment

- **Build trust:** Fast, reliable fulfillment strengthens brand credibility and drives long term-loyalty.
- **Drive performance:** A smooth order experience increases brand engagement and advocacy.
- **Financial costs:** You are responsible for timely, accurate shipments and any costs resulting from reshipments and delays.
- **Store shut downs:** Ongoing delays or fulfillment issues will lead to program review and and risks your store being shut down.

CONTENTS

- Order Processing 101
- Related Orders & Shipping
Across Deals
- Reauthorizing payment
- Cancelling Orders
- Returns
- Issues & Support
- Order Summary Email

Orders dashboard

An all-in-one view of your orders and ecommerce health.

Red Leaf Outfitters
Order Processing

Dashboard Orders

Analytics
Orders
Communities
Campaigns

Orders to Review [See all orders >](#)

Status	Orders	Subtotal
Needs Attention >	0	\$0.00
New >	2	\$310.20
In Progress >	0	\$0.00

Orders to Review [See all orders >](#)

Status	Orders	Subtotal
Needs Attention >	3	\$1,200.00
New >	5	\$2,500.00
In Progress >	2	\$500.00 CAD 1,200.00

Inventory [Manage inventory >](#)

Catalog	Fulfillment Outlet	% in Stock	Most Recent Upload
Flash Deal - Jun 2025	US	49%	Jul 1 at 3:00 pm
7.25.PFAS.Few.Non.PFAS	US	85%	May 15 at 8:15 am
7.25.PFAS.Few.Non.PFAS	Canada	70%	May 15 at 8:15 am

Program Health Past 30 days Updated: Aug 1 at 5:00 am

Avg Processing Time 1 day Recommend < 3 days	Cancellation Rate 1.3% Recommend < 3 %	Exception Rate 2.2% Recommend < 2%
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See outstanding orders by status, inventory by fulfillment outlet and program health with order metrics.

Orders dashboard

Needs Attention

- Late shipments
- Expired/expiring card auths
- Card declines
- Expiring orders
- Pending returns
- Escalated orders

New

- Orders ready to be processed

In Progress

- Orders ready to be shipped

Status	Orders	Subtotal
Needs Attention >	0	\$0.00
New >	2	\$310.20
In Progress >	0	\$0.00

Program health

Process orders daily to maintain optimal program health.

- On the **Orders Dashboard** you'll see an overview of your average 30-day fulfillment performance.
- **Exception rate** includes orders that have a problem, such as escalated, flagged or declined (most often a result of expired card authorizations).

Program Health Past 30 days ▾

Avg Processing Time

1 day

Recommend < 3 days

Cancellation Rate

1.3%

Recommend < 3 %

Exception Rate

0%

Recommended < 2%

Orders list

- See all orders in one place, sorted in order of priority
- Search, sort and filter orders by status, keywords, SKU and fulfillment hub
- Select an order to start processing

<input type="checkbox"/>	Order ID	Order Date	Order Status	Expert	Total	Payment Status
<input type="checkbox"/>	8877062	Today at 2:21 pm	New		\$260.06	Pending
<input type="checkbox"/>	8876961	Today at 1:30 pm	New		\$120.21	Pending
<input type="checkbox"/>	8876532	Today at 10:08 am	Fulfilled		\$152.70	Paid
<input type="checkbox"/>	8875967	Yesterday at 10:01 pm	Fulfilled		\$188.12	Paid
<input type="checkbox"/>	8875428	Yesterday at 4:59 pm	Fulfilled		\$270.44	Paid
<input type="checkbox"/>	8875350	Yesterday at 4:10 pm	Fulfilled		\$146.76	Paid
<input type="checkbox"/>	8874687	Yesterday at 10:04 am	Fulfilled		\$172.45	Paid
<input type="checkbox"/>	8874294	Wednesday at 11:29 pm	Fulfilled		\$110.28	Paid





Processing orders

- Review order details, adjust quantities, edit shipping or leave comments or leave comments internally or for experts.
- Click **Start Processing Order** to initialize credit card authorization and commence the **7 day shipping window**.

ⓘ Orders not shipped within the 7 days will require credit card reauthorization.

[< Back](#) **Start processing**
Order 189520 • Jul 11 at 8:00 am

Items to process

	Men's Echo Hoodie Color: Black, Size: M SKU: PEM-1019300 Product Code: 34985703 UPC: 584902605798	\$50.00	<input type="text" value="3"/> / 3	\$150.00
	Men's Zendo Multi Shorts Color: Black, Size: S SKU: PEM-1019300 Product Code: 34985703 UPC: 584902605798	\$50.00	<input type="text" value="3"/> / 3	\$150.00
	Swift Cap Color: Spice Reflective, Size: One Size SKU: PEM-1019300 Product Code: 34985703 UPC: 584902605798	\$20.00	<input type="text" value="1"/> / 1	\$20.00
	Seattle Rain Hat Color: Willow, Size: M SKU: PEM-1019300 Product Code: 34985703 UPC: 584902605798	\$20.00	<input type="text" value="1"/> / 1	\$20.00

Cancel items whose quantities are not fully included above

Shipping

Expert selected: Standard shipping - lower 48 states (\$10.00)

Override shipping cost

Comment

Share with expert

Summary

Item subtotal (7)	\$340.00
Shipping	\$10.00
Transaction fee	\$6.00
Coupon	-\$1.00
Sales tax	\$20.00
Total	\$375.00

[Start Processing Order](#)

Payment authorization will be requested upon submission. Expert will not be charged until order has been fulfilled.

Fulfilling orders

- Once processing has started, the order status will update to **In Progress**.
- Select an **In Progress** order to view order details and retrieve shipping address.
- After you have shipped the order, click **Fulfill order** to add tracking info and capture payment.

In Progress [Fulfill order](#) [Cancel](#)

Duffle
Size: 40 L, Color: Black
SKU: K1471, Product Code: K1401,
UPC: 4013051034531

~~\$220.00~~ \$143.00 x 1 \$143.00

Payment **Authorized** [Request support](#)

Subtotal	1 item	\$220.00
Discount	Experts-Only Pricing - Pro	-\$77.00
Shipping	UPS - Ground	\$14.00
Transaction fee		\$2.50
Sales tax	Sales Tax - WI - 5.0%	\$7.85
Total		\$167.35
Paid		\$0.00

Expert
Demo User
ExpertVoice Employees
1 order

Shipping Address
130 Main St
Apt
Menasha, WI 54952
US

Phone
(123) 456-7890




Additional details
Fulfillment Outlet US
Currency USD

Fulfilling orders

- Review order details, adjust quantities and shipping and share order updates with experts.
 - Input **shipping and tracking** information (required).
 - Click **Fulfill order** button to capture payment.
- ★ Include **Reference Order + Vendor Invoice #s** from your system for clarity in financial reporting.

[< Back](#) Fulfill order
Order 189520 • Jul 11 at 8:00 am

Items to fulfill

	Men's Echo Hoodie Color: Black, Size: M SKU: PEM-1019300 Product Code: 34985703 UPC: 584902605798	\$50.00	<input type="text" value="3"/> / 3	\$150.00
	Men's Zendo Multi Shorts Color: Black, Size: S SKU: PEM-1019300 Product Code: 34985703 UPC: 584902605798	\$50.00	<input type="text" value="2"/> / 2	\$100.00
	Seattle Rain Hat Color: Willow, Size: M SKU: PEM-1019300 Product Code: 34985703 UPC: 584902605798	\$20.00	<input type="text" value="1"/> / 1	\$20.00

Cancel items whose quantities are not fully included above

Summary

Item subtotal (6)	\$270.00
Shipping	\$10.00
Transaction fee	\$6.00
Coupon	-\$1.00
Sales tax	\$20.00
Total	\$305.00

[Fulfill order](#)

Order will be invoiced upon submission.

Shipment Date *

Shipping Carrier *

Shipping Carrier Service

Tracking # *

Reference Order #

Vendor Invoice #

Related orders & shipping across deals

Multiple orders from the same expert should be consolidated and shipped together.

- Related orders will be flagged in the Order Detail Pages during the processing and fulfillment stages.
- Enable experts to order products from your brand's different deals or stores, such as "Flash Deals" and "Outlet" with a single shipping fee and shipment.

Red Leaf Outfitters
Order #189520 Order status: **New** Payment status: **Pending**
Created: Aug 1 at 10:00 am

Related order(s) found
Package items from these related orders together to reduce shipping costs: [#394802](#), [#9854839](#), [#3948394](#)

Expert
Ashley Patel
REI Employees
[5 orders](#)

Shipping Address
123 1st St
Anytown, MN 55555
United States

Phone
(123) 456-7890


Additional Details
Fulfillment Outlet US
Currency USD

Item	Color	Size	Unit Price	Quantity	Total Price
Men's Echo Hoodie	Black	M	\$100.00	3	\$150.00
Men's Zendo Multi Shorts	Black	S	\$100.00	3	\$150.00
Swift Cap	Spice Reflective	One Size	\$40.00	1	\$20.00
Seattle Rain Hat	Willow	M	\$40.00	1	\$20.00

Reauthorizing payment

- Credit authorization expires if an order is not fulfilled **within 7 days (168 hours)** of processing.
- **Expired Auths** will be flagged in the dashboard, order summary email, and order details page.
- Click **Reauthorize payment** from the order details page to restart the 7-day authorization.

① Brands assume full responsibility for orders shipped under an expired authorization.

 **Auth Expired**
Reauthorize payment to process this order. [Reauthorize Payment](#)

Payment	Auth Expired	↻ Reauthorize payment	? Request support
Subtotal	1 item		CAD 599.99
Discount	LIMITED-TIME SPECIAL		-CAD 150.00
Shipping	FedEx Ground - Ground		CAD 0.00
Transaction fee			CAD 5.00
Sales tax	PST - SK - 6.0%		CAD 27.00
	GST - 5.0%		CAD 22.50
Total			CAD 504.49
Paid			CAD 0.00

Reauthorizing payment

Important:

- Wait until the order is ready to ship.
- Double-authing can cause payment to decline and tie up funds for the expert.
- Experts can see every authorization on their end.
- If an order ships and payment is not captured, refer to the [Ship No Capture Process](#).

Payment	Auth Expired	↻ Reauthorize payment	🔔 Request support
Subtotal	1 item		CAD 599.99
Discount	LIMITED-TIME SPECIAL		-CAD 150.00
Shipping	FedEx Ground - Ground		CAD 0.00
Transaction fee			CAD 5.00
Sales tax	PST - SK - 6.0%		CAD 27.00
	GST - 5.0%		CAD 22.50
Total			CAD 504.49
Paid			CAD 0.00

Cancelling orders

- If you're unable to fulfill an order—or an expert reaches out to cancel before fulfillment—you can cancel from the order detail page at any stage.
- Select the items and quantities that you need to cancel and a reason from the list, e.g. **Out of Stock**.
- **Other** requires that you give additional detail in the comment box

The screenshot shows the 'Cancel' page for Order #189520, dated Jul 11 at 8:00 am. The page is divided into several sections:

- Items to cancel:** A table listing four items with their respective unit prices, quantities, and total prices. The quantity input fields are circled in red, showing '0' for each item.



Item	Unit Price	Quantity	Total Price
Men's Echo Hoodie (Color: Black, Size: M)	\$50.00	0 / 3	\$150.00
Men's Zendo Multi Shorts (Color: Black, Size: S)	\$50.00	0 / 3	\$150.00
Swift Cap (Color: Spice Reflective, Size: One Size)	\$20.00	0 / 1	\$20.00
Seattle Rain Hat (Color: Willow, Size: M)	\$20.00	0 / 1	\$20.00
- Summary:** Shows a 'Refund total' of \$0.00 and a prominent blue 'Cancel item(s)' button, which is also circled in red. Below the button, it states 'Expert will be notified upon submission.'
- Reason for cancellation *:** A dropdown menu with the option '-- Select a reason --' circled in red.
- Comment:** A text input field with the placeholder 'Leave a comment...' and a checked checkbox for 'Share with expert'.
- Order Status:** Located at the bottom right, it shows 'Order #189520' with status 'Auth Expired' (red), 'New' (yellow), and 'Payment status: Pending' (grey). A 'Reauthorize Payment' button is present.
- Item Summary:** A summary row for the 'Men's Echo Hoodie' showing a unit price of \$100.00, a quantity of 50.00 x 3, and a total price of \$150.00. The 'Cancel' button next to it is circled in red.

Returns

- When an expert requests a return, Expert Support will request an RMA from you via email.
- Once issued, the expert will be asked to ship the item(s) back.
- When you receive the items, click **Manage return** on the order detail page, select the items + quantities, then **Issue refund**.
- For brands using Aftership, the shipping label will trigger the refund - no need to issue manually or complete the return in our system.


Fulfilled Package 1 [Edit](#) [Manage return](#)

UPS Tracking # [900000000000000001](#)
PO # 495830487039373 Reference Order # 9384274-FE4938-3
Vendor Invoice # 9384274-FE4938-3




	Men's Echo Hoodie Color: Black, Size: M SKU: PEM-1019300, Product Code: 34985703, UPC: 584902605798	\$100.00 \$50.00 x 2	\$150.00
	Men's Zendo Multi Shorts Color: Black, Size: S SKU: PEM-1019300, Product Code: 34985703, UPC: 584902605798	\$100.00 \$50.00 x 3	\$150.00

Fulfilled Package 2 [Edit](#) [Manage return](#)

UPS Tracking # [9000000000000000003](#)
PO # 495830487039373 Reference Order # 9384274-FE4938-3
Vendor Invoice # 9384274-FE4938-3

	Seattle Rain Hat Color: Willow, Size: S SKU: PEM-10351		
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[Back](#) Manage return
Order 189520 • Jul 11 at 8:00 am

Items	Price	Quantity	Total
 Men's Echo Hoodie Color: Black, Size: M SKU: PEM-1019300 Product Code: 34985703 UPC: 584902605798	\$50.00	0 / 3	\$0.00
 Men's Zendo Multi Shorts Color: Black, Size: S SKU: PEM-1019300 Product Code: 34985703 UPC: 584902605798	\$50.00	0 / 2	\$0.00
 Seattle Rain Hat Color: Willow, Size: M SKU: PEM-1019300 Product Code: 34985703 UPC: 584902605798	\$20.00	1 / 1	\$20.00

Shipping Refund Amount
\$0.00

Refund Summary	
Item subtotal (1)	\$20.00
Shipping	\$0.00
Transaction fee	-\$0.25
Coupon	-\$0.25
Sales tax	\$1.50
Refund total	\$21.75

[Issue Refund](#)

Expert will be notified upon submission.

Request support

Required when:

- Refund needed
 - Shipped without payment
 - Chargeback
 - Other issues
-
- Click **Request Support** from the order detail page and select a reason from the list.
-
- Once submitted, the order will be locked until resolved by Customer Success.

Payment Authorized

Subtotal	1 item	\$220.00
Discount	Experts-Only Pricing - Pro	-\$77.00
Shipping	UPS - Ground	\$14.00
Transaction fee		\$2.50

[Request support](#)

[Back](#) **Request Support**
Order 7892344 • Jan 10 at 9:23 am

Issue *
-- Select an issue --

Issue Description *
Describe the issue...

Note: Submitting this request will lock the order from further change until the issue has been resolved by Customer Success.

[Cancel](#) [Submit Issue & Lock Order](#)

Order summary email

The order summary email gives a high-level-view of outstanding orders and inventory levels. Have your CS partner assign the appropriate team members to the order summary email list.

- **Needs Attention:** expiring/expired orders and authorizations, declines, late shipments, pending returns, escalated orders
- **New:** yet to be processed
- **In Progress:** waiting to be shipped

Remember to check your spam folder if you are not seeing the emails.

Your Red Leaf Outfitter [Order Summary](#) for Aug 1, 2025

Orders to Fulfill

Orders should be fulfilled within 3 days.

Order Status	# of orders
Needs Attention	3
New	5
In Progress	2

Current Inventory

Keep inventory stocked ahead of upcoming promotions to avoid missed orders.

Catalog	% in stock
Flash Deal - Jun 2025	49% Inventory low
Expert Deal - May 2025	85%

Manage your orders in the Advocacy Platform:

<https://advocacy.expertvoice.com/app/orders>

Order statuses

- **Order statuses** are displayed in the dashboard, order summary email, orders list page and order detail pages.
- They use a traffic light color system to help you quickly identify and prioritize orders that are new or in need of attention.

Red Leaf Outfitters
Order 189520 Order status: New Payment status: Auth Expired [Request support](#)
Created: Aug 1 at 10:00 am

Order Statuses

New	Order received, processing not started
In Progress	Payment authorized, add shipping details to fulfill
Return Pending	Return approved, waiting for items to be received
Late Shipment	Unfulfilled for 3+ days, fulfill soon to avoid delays
Order Expiring	Will expire within 5 days, fulfill now to avoid cancellation
Escalated	Issue under review by Customer Success, order locked
Action Needed	Issue detected, user action required to continue processing
Fulfilled	All items shipped, payment processed
Returned	Order fully or partially returned
Canceled	Order fully or partially canceled before fulfillment
Order Expired	Not fulfilled before expiration, do not ship

Payment statuses

- **Payment statuses** are displayed in the orders list page where they can be used as a filter and the order detail pages.
- They use a traffic light color system to help you quickly identify and address orders in need of attention.

 **Payment declined**
This order cannot be marked as fulfilled until this issue has been resolved. Contact [Customer Success](#) for more details. Clear Exception

Payment Statuses

Pending	Payment authorization not requested, request will be issued when order starts processing
Authorized	Payment authorization approved, fulfill before it expires
Auth Expiring	Payment authorization expiring within 3 days, fulfill now
Auth Expired	Payment authorization expired, reauthorize to continue processing
Declined	Payment declined, escalate if needed
Paid	Payment captured successfully
Partially Refunded	Partial refund issued to expert
Refunded	Full payment refunded to expert
No Charge	Order provided at no cost to expert