



Fulfillment Management Manual

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Revision History

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1 Introduction/Overview

What is fulfillment management?

Once an order has been checked for compliance and entered into ShipCompliant, you can use Fulfillment Management to ensure the order is shipped and that it will appear on your reports. Whether you fulfill in house or through a third party shipper, Fulfillment Management can be used to process orders, view any changes to your orders and track your shipments.

The image below describes a typical fulfillment process for orders being processed internally or via a third party. Order information is first entered into any order management system for payment collection and order processing. Once there, the information is then committed to ShipCompliant either via web services/API link, a spreadsheet upload, or manual entry. That order information is then available for fulfillment via a third party, in house, and reporting as necessary. Then, orders can be passed from ShipCompliant to the eventual fulfillment location (In House

or via a Third Party). When the orders have been shipped, tracking information is then added to ShipCompliant either by an external fulfillment location or internally to ensure accurate reporting moving forward.



Below is an example of what a typical fulfillment management page would look like with important sections highlighted and notated:

The screenshot shows the 'Orders' section of the ShipCompliant interface for 'James Edward Vineyards'. The page is annotated with several callouts:

- Process Shipments Ready for Fulfillment:** A callout box explains that orders will appear here if the shipment status is 'Sent To Fulfillment' and the fulfillment location is set to the user's preferred location.
- View or Update Previous Fulfillment Batches:** A callout box provides instructions: 1. Orders appear here until processed. 2. Processing creates a batch and moves orders to this section. 3. See FAQ's for options like clearing exceptions and adding tracking numbers.
- Indicates when all tracking numbers are uploaded:** A red arrow points to a green cell in the '% Track' column of the batch table.

Account	Shipments	Club	Daily	3T	Exceptions	Future	Updated
InHouse	197	-	197	-	-	-	3 days ago

Batch	Account	Shipments	Club	Daily	3T	Exceptions	% Track	Processed	By
256	JamesEdwardFulfillment	1	-	1	-	-	0%	5/26/2010 9:53 AM	Jason Eckenroth
255	InHouse	50	-	50	-	-	0%	5/25/2010 12:59 PM	Jim Agger
254	InHouseFedEx	3	-	3	-	3	0%	5/25/2010 12:47 PM	Jim Agger

You can use the fulfillment management page to help you:

- Send orders to your fulfillment locations, process shipments into a UPS World Ship format and use our FedEx integration to print packing/shipping labels.

- Ensure tracking numbers are getting added to your orders so shipment status and actual order ship dates are updated, so each shipped order is populated on your reports accurately.

2 In-House Fulfillment Workflow Process

In a typical in-house fulfillment workflow, you must first locate the orders ready to be fulfilled. Then, you must make sure the orders ready to be fulfilled have a shipment status of “Sent to Fulfillment” and a fulfillment location of “In House”, “In House UPS” or “In House FedEx” to make them visible on the main Fulfillment Management page.

1. First, ensure that the orders which you would like fulfilled have been committed to ShipCompliant from any order management system and have a shipment status of either “**In Process**”, “**Payment Accepted**” or “**Sent to Fulfillment**” - in other words, any order not already considered shipped or delivered. You can verify that they have been committed by searching on the order’s invoice number (or other criteria) via the “Search Orders” tab.

- i. *Though we recommend fulfilling your orders directly from the Fulfillment Management page, you can also begin the fulfillment process from the “Search Orders” results pages by locating the order, clicking that order’s selection checkbox, then clicking the green “Fulfill Selected Shipments” button and updating the order’s fulfillment location appropriately.*

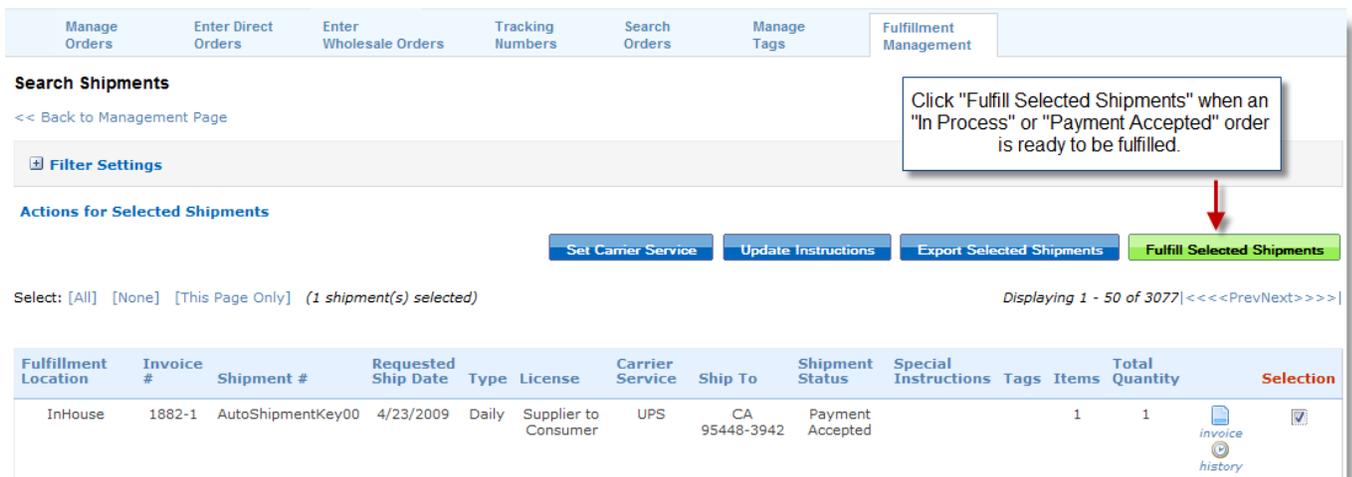
A rectangular button with a green gradient background and a thin black border. The text "Fulfill Selected Shipments" is centered on the button in a black, sans-serif font.

- ii. *If an order that has been committed has already been shipped, simply click the checkbox which states “Mark selected shipment as already shipped” to skip the fulfillment management process.*
2. Once you have verified the orders requiring fulfillment exist within ShipCompliant (and have not already been fulfilled), click the “Fulfillment Management” sub-tab located under the “Orders”

main tab. Then, on the left hand side of the screen in the yellow instructional box, click the “Search Shipments” button.



You will then see a table containing all orders with a status of “**In Process**”, “**Payment Accepted**” or “**Sent to Fulfillment**” orders with no fulfillment location specified.



3. Select the orders ready for fulfillment, then click the green “Fulfill Selected Shipments” button and select the appropriate in-house fulfillment type from the dropdown menu. The selected orders will then be placed into an in-house fulfillment batch.
4. To access an in-house fulfillment batch to begin order processing, first, click the “Process” icon on the right.

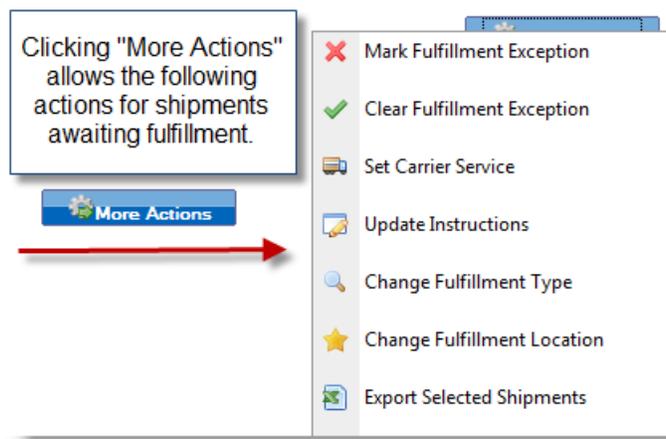


- i. For orders sent to a third party fulfillment location, this will appear as a View/Update icon. Please note: orders being

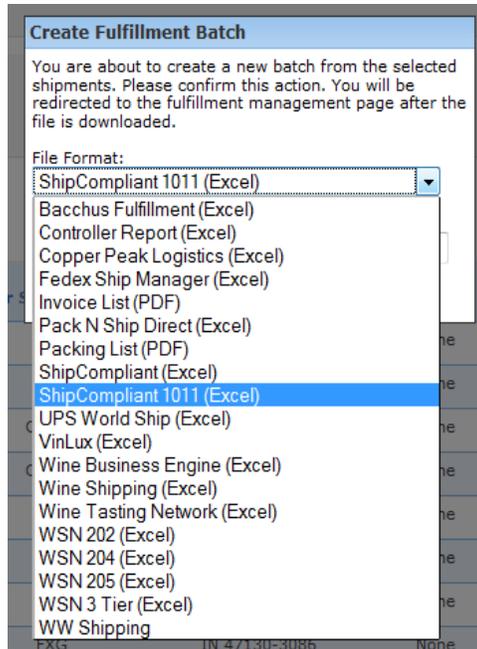
processed by a third party fulfillment location can be pulled for shipping at any time by the fulfillment location once they have been batched.



- ii. *Orders may require changes to carrier service, management of temperature analyses, or marking or clearance of specific fulfillment exceptions. To access order modification options, select the order(s), then click “More Actions”*



- iii. *You may modify order details or exceptions for in-house orders even after they have been pulled into a batch.*
5. You will then select which orders are to be processed by clicking their selection box(es), performing any additional temperature analyses, carrier or special instruction changes, then clicking “Fulfill Selected Shipments” again. You will be prompted to select a file format into which you will download the selected shipments and include an optional batch comment, which you can use to indicate any specific notes about the batch processing.



6. The batch will appear under “View or Update Previous Fulfillment Batches” on the main fulfillment management page and ShipCompliant will automatically assign a batch number. As an in-house batch, you can download the orders again, add tracking numbers, run a second temperature analysis, and perform other actions. Within a batch, click the “Add Tracking” link to add tracking information to an order that has shipped.

View or Update Previous Fulfillment Batches

[Filter Settings \(advanced\)](#)

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Batch	Account	Shipments	Club	Daily	3T	Exceptions	% Track	Date Processed	Processed By
56211	InHouseFedEx Test	1	-	1	-	-	100%	8/25/2010 5:48 PM	View/Update

Once all orders in the batch have been processed, shipped, and received tracking information, this column will read 100% with a green highlight to indicate a completed fulfillment batch.

- i. *Alternatively, you can perform a batch upload of tracking information from the “Tracking Numbers” sub-tab located under the “Orders” main tab. Please see the “Tracking Numbers” sub-tab for additional detailed instructions.*
- ii. *Adding tracking numbers, when available, is **critical** to accurate reporting for in-house shipments. When added to an order, tracking numbers will ensure that an order has*

the appropriate date of shipment and shipment status so it will appear on any state report where necessary.

7. Repeat steps 1 through 6 as necessary for any additional batches you wish to process. Remember that while adding tracking information to your orders is not required, it is highly recommended to ensure accurate reporting.

3 Third Party Fulfillment Workflow Process

1. In a third-party fulfillment workflow, the process of making orders available to an external fulfillment location is very similar to the process of fulfilling orders in house. First, the orders must be committed to ShipCompliant, then, made available to the third-party fulfillment location.
 - i. *Remember: orders to be fulfilled must be committed to ShipCompliant and have a shipment status of either **“In Process”**, **“Payment Accepted”** or **“Sent to Fulfillment”** - in other words, any order not already considered shipped or delivered.*
 - ii. *Some third party fulfillment locations may require specific credentials to be added to your ShipCompliant account before they are able to pull orders or add tracking information. Please inquire with your fulfillment location if this is required.*
2. Once you have verified the orders requiring fulfillment via a third party exist within ShipCompliant with the appropriate shipment status (and have not already been fulfilled), click the “Fulfillment Management” sub-tab located under the “Orders” main tab. Then, on the left hand side of the screen in the yellow instructional box, click the “Search Shipments” button.

1 Find Shipments ready for fulfillment.

Search for in process and payment accepted shipments.

[Search Shipments](#)

Hint: you can also use the search orders functionality.

3. You will then see a list of orders available for fulfillment displayed. To make the orders available to the third party fulfillment location, select the appropriate orders via the selection boxes on the right, then click the green “Fulfill Selected Shipments” button. Then, simply make sure you have selected the appropriate fulfillment location from the available choices in the dropdown menu and click the green “Next” button.
 - i. *Please note: If you click the “Mark the selected shipment as already shipped (skip fulfillment management)” option, the order will be marked as shipped and will not be available to any third party for fulfillment.*

Manage Orders | Enter Direct Orders | Enter Wholesale Orders | Tracking Numbers | Search Orders | Manage Tags | Fulfillment Management

Search Shipments

<< Back to Management Page

[Filter Settings](#)

Actions for Selected Shipments

[Set Carrier Service](#) | [Update Instructions](#) | [Export Selected Shipments](#) | [Fulfill Selected Shipments](#)

Select: [All] [None] [This Page Only] (1 shipment(s) selected) Displaying 1 - 50 of 3077 | <<<PrevNext>>>

Fulfillment Location	Invoice #	Shipment #	Requested Ship Date	Type	License	Carrier Service	Ship To	Shipment Status	Special Instructions	Tags	Items	Total Quantity	Selection
InHouse	1882-1	AutoShipmentKey00	4/23/2009	Daily	Supplier to Consumer	UPS	CA 95448-3942	Payment Accepted			1	1	<input checked="" type="checkbox"/> invoice history

Fulfill Selected Shipments

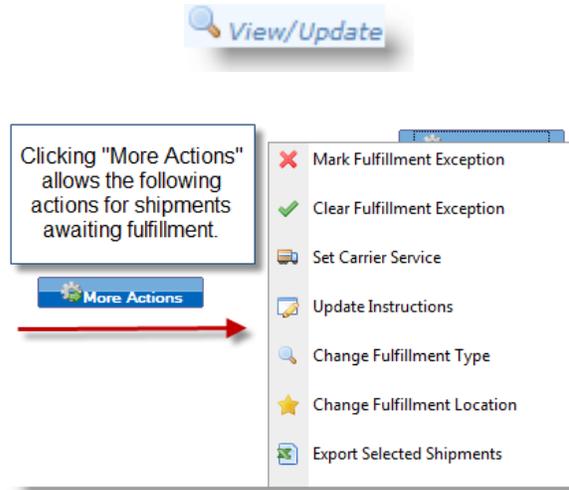
Update the selected shipment's fulfillment location to PackNShipDirect?

PackNShipDirect

Mark the selected shipment as already shipped (skip fulfillment management).

[Next](#) or [Cancel](#)

4. The order(s) will then be available to the third party fulfillment location and appear under the “Process Shipments Ready for Fulfillment” section. You will still be able to make changes to specific order details by clicking the “View/Update” icon and utilizing the “More Actions” button before the fulfillment location pulls the orders into a batch.



- i. *Please note: in a third party fulfillment workflow, once orders have been pulled into a batch you are no longer able to use more actions to make order changes. If further order changes are required, it is recommended that you contact the fulfillment location directly.*
5. Once these orders have been pulled into a batch by a fulfillment location, the fulfillment location will then begin processing. You will be able to see who pulled the batch, when the batch was pulled, how many shipments were in the batch and how many of the shipments have received tracking information. Moving forward, you will be able to monitor your batches that have been pulled in real time and see where your orders are in the shipping process. “Completed” batches read “100%” in the “% Track” column (after all orders have received tracking numbers).

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Batch	Account	Shipments	Club	Daily	3T	Exceptions	% Track	Date Processed	Processed By	
319	PackNShipDirect Test	1	-	1	-	-	100%	8/30/2010 12:04 PM		 View/Update

4 Frequently Asked Questions

1. Why can't I view all my orders when I select "View/Update"?

If you cannot see orders that you know to be a part of a fulfillment batch, they may be marked with a different license relationship type, or may have future ship dates specified. To view any orders with future ship dates, you will need to use your "Filter Settings" to adjust the "Requested Ship Date" to a point in the future when you believe the orders are specified to ship. To view any orders with a different license relationship type, you will need to select the appropriate license relationship type from the dropdown menu then click "Filter."

2. What is a fulfillment exception? How do I mark an exception? How do I clear an exception?

Fulfillment exceptions are specific issues marked for orders awaiting fulfillment. Your fulfillment location may handle orders with exceptions differently than orders without exceptions - we recommend establishing a process with your fulfillment location on how to handle specific exceptions. Fulfillment exceptions are noted with a red highlight and a value beneath the "Exceptions" column on the fulfillment management page.

Exceptions can occur as a part of the fulfillment process (e.g., when processing an order for fulfillment that was noncompliant) or generated manually (marking an order with a temperature exception). You can mark an exception by selecting the order, clicking "More Actions", then clicking "Mark Fulfillment Exception" and choosing the appropriate type. To clear an exception, select the order, click "More Actions", then click "Clear Fulfillment Exception."

3. Is there a way that I can confirm that all of my fulfilled orders have received tracking information at the end of a reporting period?

Yes. This is most easily done by navigating to the “Search Orders” page, choosing appropriate date criteria (if applicable) selecting from the tracking status dropdown “Zero Tracking Numbers” and searching. Any orders with no tracking information will then be displayed. Additionally, any fulfillment batches which have been processed that are incomplete (where not all orders have tracking) will also not display the green highlighted “100%” value.

5 Help and Support

For any additional questions, concerns or issues with fulfillment or the fulfillment management process, please contact ShipCompliant Support by emailing support@shipcompliant.com or by calling (303) 996-2356.

Alternatively, from within the ShipCompliant portal, you can click the “Contact Support” link at the bottom of any page to quickly and easily create a case for ShipCompliant Support.

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