MARKETPLACE USTORE FULFILLMENT PROCESS

June 26, 2017

AUTO-FULFILL VS. FULFILLMENT

1. Differences

Products in the uStore can be either auto-fulfilled (fulfilled automatically upon payment) or they can be manually fulfilled by the Merchant. Some things to remember:

- *If Auto-fulfilled, the CC is automatically charged when the customer submits payment. Customer would need to go through your refund/cancellation process (per your own policy) to be refunded.*

- *Donation type products MUST be auto-fulfilled. This includes recurring payments and any customer entered amounts (invoices, etc.)*

- *If product is NOT auto-fulfilled, the merchant must review the orders and manually fulfill the order once the order is approved. This is appropriate if the department needs to confirm or verify inventory, eligibility, or other reasons.*

- *If product is NOT auto-fulfilled, the order is authorized to the Credit Card, but not charged until the order is fulfilled. Credit Card authorization is a hold/authorization that remains for only 3 days.*

2. How do you know if there is an order to be fulfilled?

Email Notification

- *When a customer orders a product (registers for an event, etc.) a PRODUCT NOTIFICATION email is sent to whoever you listed to receive order notifications.*

- *When the notification is received, the department can log into the Marketplace application and review/fulfill the order.*

- *If someone other than the people listed in the product notification email is the fulfiller, the email recipient should notify the fulfiller.*

- *Best practice would suggest that a fulfiller be listed as one of the people receiving the product notification.*

Checking your uStore in Marketplace

- *Log into the TouchNet Marketplace application.*

- *Click on your Merchant name.*

- *Click on Stores.*

- *Click on the name of the store you are checking.*

- *Click on Fulfill Orders. Any pending orders will be listed here.*

FULFILLING ORDERS

1. Locate Pending Orders in Marketplace.

- *Log into the TouchNet Marketplace application.*

- *Click on your **Merchant** name in the left menu.*

- *Click on **Stores** in the left menu.*

- *Click on the **name of the store** you are checking.*

- *Click on **Fulfill Orders**. Any pending orders and completed orders will be listed here.*

2. Fulfilling Single Order

- *Check the box next to the product you wish to fulfill.*

- *Click on **Process Fulfillment.***

- *A popup window will appear asking for confirmation that you wish to fulfill the shipments. Click **OK**.*

There are 4 steps for fulfillment.

Step 1: PROCESS FULFILLMENT

- *Review the orders and decide if it's appropriate to fulfill. Note: If you must change the quantity before fulfilling, select the number you CAN fulfill and click on **Update Quantity**.*

- *Click on Process Fulfillments. A popup window will appear to confirm that you are fulfilling the order. Click **OK**.*

- *The credit card is charged at this step.*

**If you do not need to print a packing slip, add a tracking number or email the buyer, you can stop here. However, it is recommended that you continue and email the buyer that their order is complete.

Step 2: PRINT PACKING SLIP

- *If the product requires no shipping, click **Proceed To Step 3**.*

- *If the product is physical inventory that must be shipped, you can click on **Print Packing List** to create a packing list to be included in your shipment.*

- *A popup window will appear with your shipment details along with a printing submission screen.*

- *Once printed, close the pop up windows and click **Proceed To Step 3**.*

Step 3: SHIPMENT TRACKING NUMBER

- *If the product has no tracking number, or requires no shipping, click on **Proceed To Step 4**.*

- *If you are shipping a product, you can enter a Tracking Number in the field. Then click on **Proceed To Step 4.***


```
                          *** PACKING LIST ***
Ship To:                                Ship From:
                                        Aquatics


STOCK #          QTY  ITEM NAME
SwimLessons_LVL4  1   Level 4 Swimming Lessons
                      Session : May 23rd-June 13th Tues & Thurs 6:45pm-7:45pm
                      Membership : Non-Member
                      Swimmer's Name : Sophie Savikas
                      Date of Birth : xxxxxxxxxxxxxxxxxxxx
                      Age : x




ORDER #27
ORDER DATE: 6/21/17 3:52:41 PM
DELIVERY METHOD: Walk-In

Customer:
Heather Savikas
Return Policy:
A full list of West Center policies can be found here: WEST CENTER POLICIES.
```

Step 4: EMAIL BUYER

- *If you wish to notify your buyer that their order has been fulfilled, click on **Send E-Mail**.*

- *Note: you are not REQUIRED to send an email as the fulfillment was processed in Step 1. However, it is generally good practice to notify them. The message on the email is set-up by the Marketplace Manager using the verbiage provided by the Merchant. Contact the Marketplace Manager to edit the language of the email.*

3. Fulfilling Multiple Orders

If fulfilling multiple orders, the merchant can process them all at once.

- *Check the **Select All** box under Pending Fulfillments.*

- *Click on **Process Fulfillment**.*

- *A popup window will appear asking for confirmation that you wish to fulfill the shipments. Click **OK**.*

<u>*There are 4 steps for fulfillment.*</u>

Step 1: PROCESS FULFILLMENT

- *Review the orders and decide if it's appropriate to fulfill. Note: If you must change the quantity before fulfilling, select the number you CAN fulfill and click on **Update Quantity**.*

- *Click on Process Fulfillments. A popup window will appear to confirm that you are fulfilling the order. Click **OK**.*

- *The credit cards are charged at this step.*

***If you do not need to print a packing slip, add a tracking number or email the buyer, you can stop here. However, it is recommended that you continue and email the buyer that their order is complete.**

Step 2: PRINT PACKING SLIP

- *If the products require no shipping, click **Proceed To Step 3**.*

- *If the product is physical inventory that must be shipped, you can click on **Print Packing List** to create a packing list to be included in your shipment.*

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Step 3: SHIPMENT TRACKING NUMBER

- *If the product has no tracking number, or requires no shipping, click on **Proceed To Step 4**.*

- *If you are shipping a product, you can enter a Tracking Numbers in the field. Then click on **Proceed To Step 4.***

*** PACKING LIST ***

Ship To: Ship From:
                                      Aquatics

STOCK #   QTY   ITEM NAME

SwimLessons_LVL4   1   Level 4 Swimming Lessons
                       Session : May 23rd-June 13th Tues & Thurs 6:45pm-7:45pm
                       Membership : Non-Member
                       Swimmer's Name : Sophie Savikas
                       Date of Birth : xxxxxxxxxxxxxxxxxxxxxx
                       Age : x

ORDER #27
ORDER DATE: 6/21/17 3:52:41 PM
DELIVERY METHOD: Walk-In

Customer:
Heather Savikas
Return Policy:
A full list of West Center policies can be found here: WEST CENTER POLICIES.

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