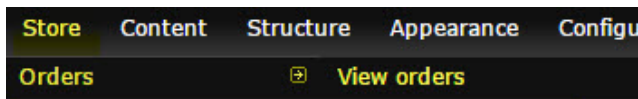


Fulfilling orders is an important part of your business and as you have chosen to accept orders through your IndieCommerce website, we want to make sure the steps to fulfill those orders are simple and clear. The scenarios below cover the most common order processes.

HOW TO FULFILL ORDERS



1. **The order is to be filled and shipped exactly as it was placed by the customer, with no revisions, and within a few days:** In this case, the order processing is simple. After the order has been boxed up and is ready to be shipped out from the store:

ACTIONS	ORDER ID
	66
	62

Update order:

Update order:

▶ **ADD AN ORDER COMMENT**

▶ **ADD AN AL**

▶ **AFFILIATE**

Order status: Abandoned Canceled Pending Processing PayPal pending Payment received **Completed** Pending Send e-mail notification on update. Update **b**

This will tell the system that the order is closed, which will cause the order to fall off of the list of active orders, and will also allow the system to charge the customer's credit card for the amount of the order.

2. **The order is to be filled within 4 weeks:** If a customer places an order for a book that you are unable to fill right away, you may decide to leave the order open (as 'Pending'), and close the order some time later. For instance, a customer has placed an order for a book that is not due to be published for two weeks (there are titles like this in the database, listed as 'Coming Soon - Available for Pre-order'). As long as the credit card authorization is still valid (they typically are within 4 weeks) you will be able to process the order as you did in Scenario 1. However, if the order is to remain 'pending' for longer than 4 weeks or, if for some reason the authorization becomes invalid during that 4 week time you would need to move on to Scenario 3.
3. **The order is to be left open for longer than 4 weeks:** If a customer places an order for a book that you are unable to fill right away, you may decide to leave the order open (as 'Pending'), and close the order some time later. For instance, a customer has placed an order for a book that is not due to be published for two months (there are titles like this in the database, listed as 'Coming Soon - Available for Pre-order'). The prior authorization captured for the payment will expire within 4 weeks. Therefore we recommend you take the following steps to process this type of order:

ACTIONS	ORDER ID
	66
	62

Update order:

▶ ADD AN ORDER COMMENT
 ▶ ADD AN AI
 ▶ AFFILIATE
 Order status: Pending

Abandoned
 Canceled
 Pending
 Processing
 PayPal pending
Payment received
 Completed

Send e-mail notification on update.

This is a way of securing payment from the credit card, but in such a way that it is still reversible. When an order is marked as 'Payment Received', the customer's card is charged, the money comes out of the card holder's account, and is deposited into an ABA holding account. That money will then sit in the holding account, until the store decides what to do with it:

- If the store subsequently marks the order as 'Completed', then the money in the holding account is released to the bookstore's bank account. At that point, the order has been paid for, and should be filled to the customer.
- If the store subsequently marks the order as 'Canceled', then the money in the holding account is released back to the card holder's account. At that point, the store has not been paid, and the order should not be shipped.

If you choose not to mark the order as 'Payment Received' and the authorization becomes invalid you will need to 'Re-Authorize' the customers credit card (you may only do so if the customer has opted to save their credit card information):

ACTIONS	ORDER ID
	66
	62

Payment:
 Balance: \$35.92 (View)
 Method: Credit card
[Show card details](#)

Use this terminal to process cre

Order total: \$35.92
Balance: \$35.92







Charge Amount
 \$ 35.92

Once the new authorize has been captured you can complete the order as normal.

If the customer has not saved their credit card to their account you will need to contact them to obtain their payment information. You can ask them to login and add it to their account and then use the above instructions to obtain an authorization and complete the order.

NOTE: There are always risks to leaving an order in a 'pending state': the credit card could expire in that time, it could be lost and reported stolen making it invalid or, as mentioned the authorization can become invalid. It is with that in mind that we recommend you take advantage of the 'Payment Received' status whenever an order cannot be filled immediately such as in Scenario 2 and 3.

4. **The order must be edited before being filled and shipped:** In this scenario, the customer places the order online, and then calls or emails the store to change the order in some way (if the order is filled by Ingram, there is no way to edit the order). To edit the order:

ACTIONS	ORDER ID
  	66
  	62

a → (points to the edit icon for order 62)

b → (points to the EDIT button in the navigation bar)

VIEW EDIT INVOICE AFFILIATE COMMISSIONS

c → (points to the Ship to: header)

Ship to:

First name: RYAN
 Last name: Quinn
 Company:
 Street address: 333 Westchester Ave
 City: New York
 State/Province: New York
 Country: United States
 Postal code: 00000
 Phone number:

Bill to:

First name: RYAN
 Last name: Quinn
 Company:
 Street address: 333 Westchester Ave
 City: bronx
 State/Province: New York
 Country: United States
 Postal code: 10470
 Phone number:

REMOVE	QTY
 e	1 d
	1

f → (points to the Products: header)

Products:

Add product

Search by name or model/SKU (* is the wildcard)

9780679805274 **i** → (points to the search input)

Select

Search

Close

----- Book Products -----
 Oh, the Places You'll Go! (Hardcover)
 ----- Custom Products -----

i → (points to the selected item)

Search by name or model/SKU (* is the wil

9780679805274

ii

Select

Search

Close

Oh, the Places You'll Go!

Qty *
1

Add to order Cancel

Shipping quote:
Get shipping quotes

Get shipping quotes

UPS Overnight Shipping: \$37.85

Pick up At Event: \$0.00

UPS 2-Day Shipping: \$24.85

UPS Ground Shipping: \$10.85

Free Shipping for over \$50: \$0.00

In-store pickup: \$0.00

Apply to order

Submit changes

Once the order has been edited, you are then free to go back to the View page and:

- If the order is for the same or lesser amount than the original total, you may mark the order as 'Completed' as soon as you are ready to ship.
- If the new order total is more than the original total, a new authorization needs to be obtained (see ['Re-Authorizing A Customers Credit Card'](#) for instructions) only after the new authorization is obtained could you 'complete' the order.

NOTE: Please be aware, though we provide you with a the means to re-authorize the customer's credit card for a higher amount, it is assumed that you are only doing so with the customers knowledge/permission.

5. **The order is to be picked up in the store:** If a store allows it, customers can choose to pick their order up in the store. This is enabled by default, and appears to the customer as a choice during the checkout process. The store can also decide if the customer must include payment info at checkout, or if they can elect to pay at the store.

- a. **The customer has chosen to pick up their order at the store, and has chosen to pay at the store:**

- If the 'Payment Method' for an order is 'Pay at store', then no credit card info has been collected, so the system needs to be told that the order is being satisfied in some other way. To do this:

VIEW EDIT INVOICE AFFILIATE CO. PAYMENTS

METHOD

Pay at Store

AMOUNT	BALANCE	COMMENT	ACTION
54.44	-		Enter

This will change the status of the order to 'Payment Received'. You'll need to go back to the View for the order, and change the Order Status to 'Completed'. Remember that these customers must pay you directly at the store.

b. The customer has chosen to pick up their order at the store, and has chosen to pay with a credit card online:

- Generally, such an order is handled just like Scenario 1, above, except that the order is not being shipped. When the customer picks up, just mark the order as 'Completed', and hand them their book. If you prefer, you can mark the order 'Payment Received' ahead of time to ensure the funds are captured and then mark it completed when they pick up.

c. The customer has chosen to pick up their order at the store, and had originally chosen to pay with a credit card online, but has changed their mind regarding the payment method upon arriving at the store. If the order is still open:

The screenshot shows a user interface for managing an order. At the top, there are buttons for 'VIEW', 'EDIT', 'INVOICE', 'AFFILIATE COMMISSIONS', and 'PAYMENTS'. A red arrow points to the 'VIEW' button (1). Below this is a 'Payment:' section with a 'Payment method' dropdown menu (2). The dropdown menu is open, showing options: 'Credit card', 'Pay at Store', 'PayPal Website Payments Standard', 'PayPal Express Checkout', 'Credit card', 'Purchase Order', 'House Account', 'Store Gift Card', 'ABA Givex Gift Card', and 'Online Only Gift code'. 'Pay at Store' is selected. Below the dropdown is a 'Submit changes' button (3). At the bottom, there is a table with columns 'AMOUNT', 'BALANCE', 'COMMENT', and 'ACTION'. The amount is 54.44 (6) and the balance is -. A red arrow points to the 'AFFILIATE COMMISSIONS' button (4). Below the table, there is a 'METHOD' dropdown menu (5) with 'Pay at Store' selected. A red arrow points to the 'ACTION' column (8). Below the table, there is a red arrow pointing to the 'COMMENT' column (7) and a red arrow pointing to the 'Enter' button (8).

This will change the status of the order to 'Payment Received'. You'll need to go back to the View for the order, and change the Order Status to 'Completed'. Remember that these customers must pay you directly at the store.

NOTE: Keep in mind that this scenario (C) can only play out if the order has been kept open until the customer arrives. If the order has already been changed to 'Completed' or 'Payment Received', then the credit card has already been charged.

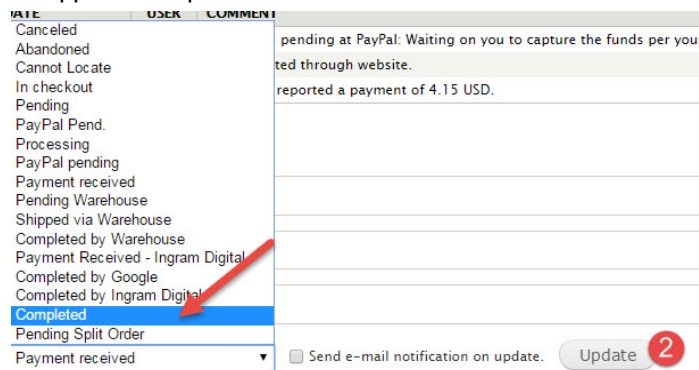
6. **The order is being paid for via Paypal:** In this scenario the customer has opted to pay for the order via 'Paypal'. The major difference here, is that the payment transaction occurs through Paypal, just marking the order complete will not collect payment.

a. If you elected to obtain an 'Authorization Only' for Paypal orders upon checkout, then you still need to capture those funds through the Paypal interface. The first part of this process will occur directly through Paypal, you will need to log in to Paypal and capture those funds. If you're unsure how to do that you can visit the self help center for 'Paypal': <https://www.paypal.com/selfhelp/home> or call their customer support line: 888-221-1161

1. After capturing the funds through Paypal, within a few minutes, the order status should update from 'Paypal Pending' to 'Payment Received' automatically.

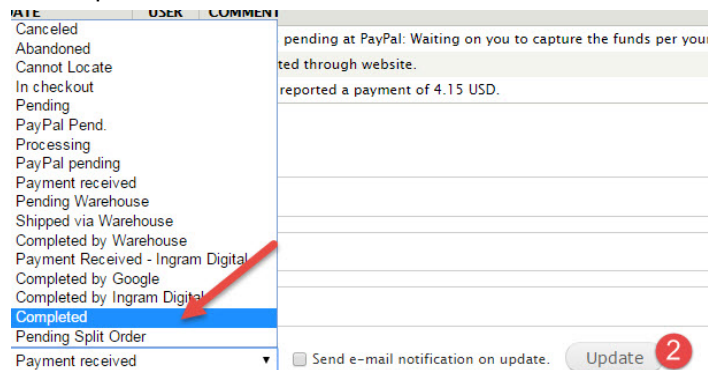


2. At this point, you can mark the order as completed once it has been picked up or shipped and update the order to close it.



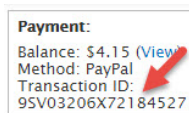
b. If you elected to 'Complete the Sale' upon checkout, the funds are captured immediately upon checkout and the order status set to 'Payment Received'.

1. At this point, you can mark the order as completed once it has been picked up or shipped and update the order to close it.



NOTES: It's important to understand that the payment transaction occurs via Paypal, prior to capturing the payment through Paypal, if you make any adjustments to the order that alters the cost, you will need to adjust the payment through Paypal. All refunds will also have to be issued through Paypal.

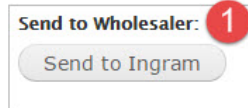
When an order is being paid for via 'Paypal', you should see the following on the order screen:



DATE	USER	COMMENT
08/18/2015 - 12:28pm	-	Payment is pending at PayPal: Waiting on you to capture the funds per your authorization settings.
08/18/2015 - 12:28pm	-	Order created through website.
08/18/2015 - 12:32pm	-	PayPal IPN reported a payment of 4.15 USD.

7. **You (the store) want the order to be fulfilled by the wholesaler:** Only orders that meet specific conditions can be sent to the wholesaler for fulfillment.

- Check to see if the order has the 'Send to Wholesaler' button, if it does:



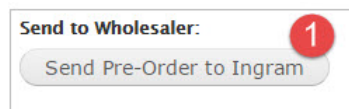
- The status should automatically update to 'Pending Warehouse' and the order is now out of your control. It should ship within 1-5 business days.
- If the 'Send to Wholesaler' button is missing, the order does not meet the requirements to be filled by the wholesaler and you will have to fill it through the store. You can find out more about what prevents an order from being eligible for 'Wholesaler' fulfillment by reviewing: [Conditions For Store v. Wholesaler Fulfilled Orders](#)

8. **The order is a pre-order and you (the store) want it to be fulfilled by the wholesaler:** A great benefit to have the wholesale fulfill a pre-order is that they will ship the title a day before release to ensure that the customer receives their item quickly. Again, only orders that meet specific conditions can be sent to the wholesaler for fulfillment. In addition to meeting those conditions, the following conditions apply specifically for pre-orders:

- Publication date must be within 105 days of release.
- The order can NOT contain any other items, including other pre-orders.

If a pre-order meets the requirements for wholesaler fulfillment the 'Send to Wholesaler' button will be available on the order.

How it works:




- In order to ensure that the customer's card is still valid, we are required to charge the card before triggering the automated fulfillment process.
- You should receive an admin comment confirming that the item was sent: Ex: Pre-order manually marked for wholesaler fulfillment by admin. Cancellation date - 2015/02/01



At this point, no further action is required by your store. The wholesaler will process and ship the order, and earnings and financial information will be displayed on your next money management report.


2. If the original order contains multiple items, you will need to remove the 'pre-order' item, process the original order as preferred and create a new order for the 'pre-order' item. Instructions on creating an order on behalf of your customer can be found by reviewing: ['Creating An Order On Behalf Of Your Customer'](#).

COMMENTS

Every order placed through your site will have 'Admin' comments and could have 'Order' comments as well. It's important that you are reviewing these comments.


Order comments: 


DATE	USER	NOTIFIED	STATUS	COMMENT
08/19/2015 - 11:06am	RyanQuinn		Pending	Thank you for your order, it will s
08/19/2015 - 11:07am	RyanQuinn		Pending	Thank you for your order, it will s

Admin comments: 



DATE	USER	COMMENT
06/15/2015 - 1:06pm	Annak	Authorize.Net: CIM profile created - 35798085
06/15/2015 - 1:06pm	Annak	Authorize.Net: CIM payment profile created - 32348112
06/15/2015 - 1:06pm	Annak	Authorization only: \$62.00 Transaction ID: 2235174326 ACCEPTED: This transaction has been approved. AVS response: Y - Address (Street) and five digit ZIP match
06/15/2015 - 1:06pm	-	Order created through website.

Update order:

[ADD AN ORDER COMMENT](#) 

[ADD AN ADMIN COMMENT](#) 

[AFFILIATE COMMISSIONS](#)

Order status: Send e-mail notification on update.  

That completes our 'Fulfilling Orders' review. We know processing orders is an integral part of your store, therefore we want to do our best to make sure you understand how the process works and the simplest ways to address certain scenarios. However, we also realize you might find yourself with a unique situation, you are more than welcome to contact us with questions or concerns at staff@bookweb.org whenever the need arises.