Post-Inventory Setup
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Orders Overview (Orders Page & Actions)

Your Orders page houses all of your orders created and imported into ShipBob. Orders are divided into a few standard statuses based on where they are in the fulfillment journey. From this page, you can also sync orders, import orders (via a formatted Excel sheet), or quickly create an order manually.

The Actions tab also lets you manipulate orders in bulk. Here are some examples of bulk actions you can take:

1. Copy or cancel orders.
2. Move orders to the On-Hold status or Processing status.
   a. If fulfillment needs to be paused for an order, move it to On-Hold.
   b. If orders are On-Hold and you’re ready to have ShipBob pick, pack, and ship them, move them to Processing.
3. Unreserve inventory (if an order does not need to be fulfilled, you can unreserve the inventory from that order so it’s available for other orders).
4. Clean sweep orders: This deletes an order in ShipBob so you can reimport from your store with updated details such as address change, the items in the order, etc.).
Orders Overview (Order Statuses)

All orders in your ShipBob account will be in 1 of 5 statuses:

1. **Processing**: Order was created or imported and is ready to be fulfilled.
2. **Completed**: Order was fulfilled and assigned a tracking number.
3. **Cancelled**: Order was manually cancelled (or automatically if the order contains digital items).
4. **On-Hold**: Order has an invalid address or payment was declined, so it cannot be fulfilled.
5. **Exception**: Order contains an unknown, out-of-stock, or inactive SKU and cannot be fulfilled.

**Note**: On-Hold and Exception orders will require your attention and manual intervention before we can fulfill them for you.

Click on the Orders page from the side navigation when logged into your ShipBob account.
Orders Overview (Shipment Details Page)

Once an order is created (via an automatic import from your store, uploaded via Excel, or manually created in your account), a Shipment Details page is generated where you can track the order’s progress, view order information, and initiate a return by creating a label. Here are a few of the things you can see on this page:

1. Order timeline
2. Shipment Details
3. Order breakdown
4. Customer information
5. ShipBob shipping details
6. Order import details
7. Attachments

Note: Once an order is fulfilled (picked, packed, and labeled), a unique tracking number is uploaded to the Shipment Details page that links to the carrier's website. This will allow you to track the progress of the shipment from ShipBob’s fulfillment center to the customer.
Orders Overview (Shipment Details Page)

Here are the actions you can take on this page:

1. **Split the order** (e.g., if an order contains two items and one is out-of-stock, you can split the order into multiple shipments so the in-stock item can be shipped out quickly to your customer).
2. **Generate a return label.**
3. **Add signature required instructions.**
4. **Subscribe or unsubscribe to order updates.**
Orders Overview (Pricing)

View the breakdown of your fulfillment cost for an order by clicking into the blue Order ID link on the Orders page here. You'll be provided with a Shipment Breakdown and the ability to view your Pricing Breakdown for any order.

Click here to learn more.

**ShipBob | Log into your account at web.shipbob.com | Find more guides & contact support at support.shipbob.com**
Notifications & Users (Invite Users & Assign Roles)

Add users to your account and provide full access or partial access based on their role. See below for the types of user roles you can assign upon user invitation.

<table>
<thead>
<tr>
<th>Type of User</th>
<th>Access Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Admin</td>
<td>All Access</td>
</tr>
<tr>
<td>Customer Success</td>
<td>Orders + Basic Reporting Access</td>
</tr>
<tr>
<td>Supply Chain</td>
<td>Orders + Inventory + Basic Reporting Access</td>
</tr>
</tbody>
</table>

Once you land on this page, navigate to the Manage Users tab.
Returns

ShipBob can help you create and manage returns as a value-added service. There are two types of returns that ShipBob supports:

1. **Return To Sender (RTS):** A return that results from a carrier or delivery failure and arrives back at ShipBob. We will automatically restock every item with the pickable inventory unless extremely damaged.

2. **Return Order:** A return that is sent back to ShipBob at your request (i.e., a customer wanted to return it). Return orders can be created in any of the following ways:
   - Through the ShipBob dashboard
   - By using one of our returns integrations partners
   - By building something custom with the ShipBob API

Manage returns here. Note: Create a return label on the Shipment Details page.

Approx. a 5-minute read that walks through pricing and processes.
Next Steps

Now that you’re familiar with order statuses, how to retrieve order tracking information, how to manage users and notifications, and how returns work, here are your next steps:

- Set up users and relevant notifications on your account.
- Review steps that require you to take action, or find information about a specific order.

To view past guides or go to the next one, view all guides here.

Post Inventory Setup (completed)
1. Order Status
2. Tracking Information
3. Account Notifications & Manage Users
4. Returns
5. Ship Option Mapping

Account Review
1. Create Test Orders
2. Analytics & Reporting Tool
3. Billing Page
4. Customers Page
5. Shipment Details Review
6. Weekly Office Hours
7. Support Ecosystem

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