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.

VISIT THE PAGE

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
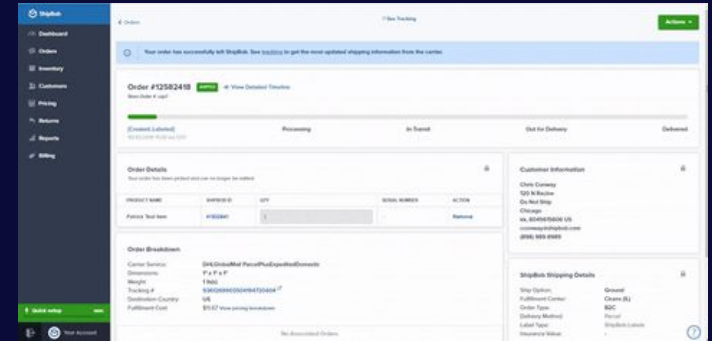
Navigate to Orders > Order ID to access the Shipment Details page of any order fulfilled by ShipBob.

READ THE GUIDE

Approx. a 10-minute read

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.
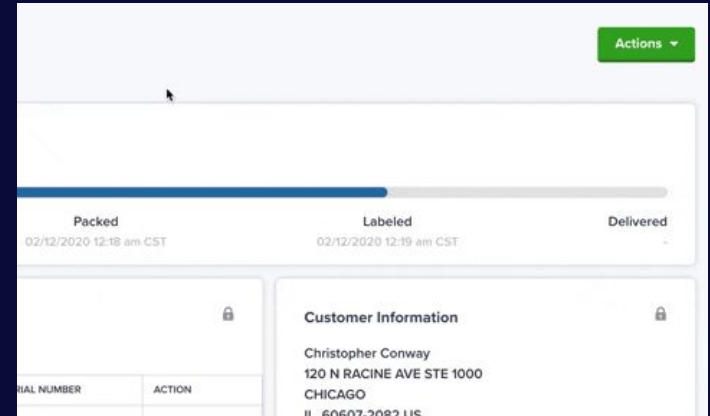
Orders Overview (Shipment Details Page)

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.**

Navigate to Orders > Order ID to access the Shipment Details page of any order fulfilled by ShipBob on your account.

READ THE GUIDE

Approx. a 10-minute read

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.

Shipment Pricing Information

This shipment was charged based on a Actual Weight of 9 oz. to be shipped to Zone 4, US with the ship option USPS Media Mail for a total price of **$4.85**, according to your pricing plan.

View Pricing Plan

ITEM NAME	SHIPBOB ID	QTY	SERIAL NUMBER	ACTION
▮▮▮▮▮▮ 01/02/2021	#142▮▮▮	2	-	Remove

Package Verified - Rest easy, based on your preferences, we've optimized the order packaging through our Package Selection Algorithm! Learn more about how it works here.

Shipment Breakdown

Carrier Service: SmartPost®
Dimensions: 13" x 10" x 8"
Actual Weight: 4 lb(s), 1 oz(s)
Package Material: Box
Tracking #   61▮▮▮▮▮▮
Destination Country: US
Fulfillment Cost: $9.68 View pricing breakdown

No Associated Shipments	No Associated Returns

Access a complete breakdown of your costs for every order on the Shipment Details page.

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.

Type of User	Access Level
Client Admin	All Access
Customer Success	Orders + Basic Reporting Access
Supply Chain	Orders + Inventory + Basic Reporting Access

VISIT THE PAGE

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

VISIT THE PAGE

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

READ THE GUIDE

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](#).

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

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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