Global-e
Smart Cross-Border™

Fulfillment

Processing Orders via the Global-e Merchant Portal

Operator Guide

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Overview

When an online store receives an international order, fulfilling an order is last step done by the merchant before the order is shipped to the customer. It usually takes place in the merchant warehouse.

Express orders are usually processed at the merchant warehouse, while non-express orders are processed at the Global-e hub for the final mile shipment.

The Merchant Warehouse Operator or Manager performs the pick and pack, processes the order, makes sure the parcels are ready for shipment, and produces the relevant documentation by the means of the Global-e Merchant Portal.

This document guides the Warehouse Operator or Manager through the steps required to complete the entire fulfillment process.

Getting Started

Logging into the Global-e Merchant Portal

To log into the Global-e Merchant Portal:

1. Access the Global-e Merchant Portal: https://web.global-e.com/GlobaleAdmin/
2. In the Login window, enter your credentials, as provided by Global-e during the on-boarding process and click **Log in**.

The Global-e Merchant Portal is displayed.

Accessing the Process Orders Screen

The Process Order screen is the core of the fulfilment process.

To access the Process Orders screen:

- In the Global-e Merchant Portal, navigate to **Orders → Merchant Hub → Process Orders**

Figure: Access the Process Order Screen

The Process Orders screen opens, showing by default the list of orders that are ready for processing according to date range settings; each order is also selected by default. Make sure to scroll down the list to view all orders.

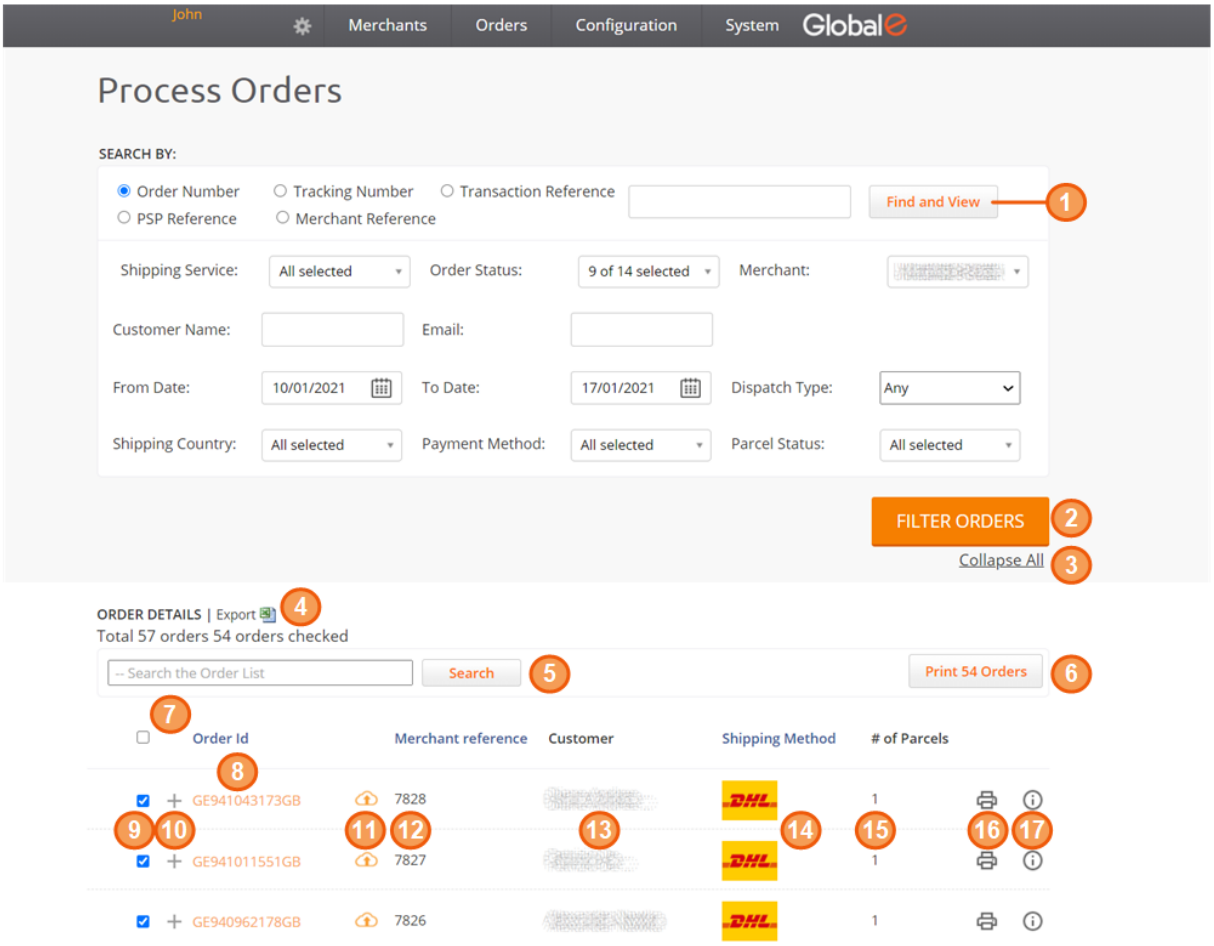


Figure: Process Order Screen

Process Order Screen Description

Process Order Screen Description

1	Find and View	Find a specific order by Order Number or Tracking Number. This search opens the Order Details screen (if permissions allow). See Using Filters.
2	Filter Orders	Narrow down the list of orders according to selected parameters. See Using Filters.
3	Collapse All	Collapse the filter section (default: expanded).
4	Export	Export the list of orders to an Excel file.
5	Search	Search for an order within the list by full Order Number (ID) or Merchant Reference (e-Commerce platform Order ID).
6	Print [n] Orders	Print the selected orders in bulk. See Processing Documents in Bulk.
7	☐	Select all orders on the page.
8	GE193457628GB	The order ID. Example: GE193457628GB. Click to open the Parcel screen.
9	☑	Single order selection.
10	+	Expand / collapse the order to view the parcels in the order.
11		PLT icon. Represents a PLT (Paperless Trading) policy order (if applicable). See Commercial Invoice.
12	Merchant reference	e-commerce platform Order ID; for merchant reference.
13	Customer	Customer name

14	Shipping Method	Shipper's logo
15	# of Parcels	Number of parcels in the order
16		Print button (for individual order processing): Print the selected order.
17		Open the Additional Information popup: **ORDER DETAILS** **Example** Country of origin: United Kingdom Shipping to: United States Created on: 10/02/2021 13:16:34 Status: Received by Global-e

Prerequisites

Before processing an order, verify that it **does not** contain Out of Stock items.

If it does, amend the order or cancel it completely. See Amending Order Line Items and Quantities and Canceling Orders.

Processing Orders

You can process:

- Regular or split orders
- Each order separately or as a group of orders, in bulk

Processing a Regular Order

This section provides instructions on how to process a regular order for which all parcels are shipped the same day.

What is a Regular Order?

A regular order contains a single package or multiple packages to be processed and shipped as a single entity the same day.

Processing a Single Parcel Order

If all items ordered by the customer can fit into one parcel, process the order as a single-parcel order.

To process the order as a single parcel:

1. Click on the relevant order line (#16).

   The relevant order documents are printed.
2. Attach the documents to your parcel.

See Order and Shipping Documentation.

Processing a Multi Parcel Order

At times, the content of an order needs to be packed in more than one parcel. A multiple parcel order contains several parcels that must be processed and shipped the same day.

The Parcel screen allows you to create additional parcels and move the order's items between parcels.

To process a multi-parcel order:

1. In the Process Order screen, click the **Order ID** (#8).

   The Parcel screen opens.

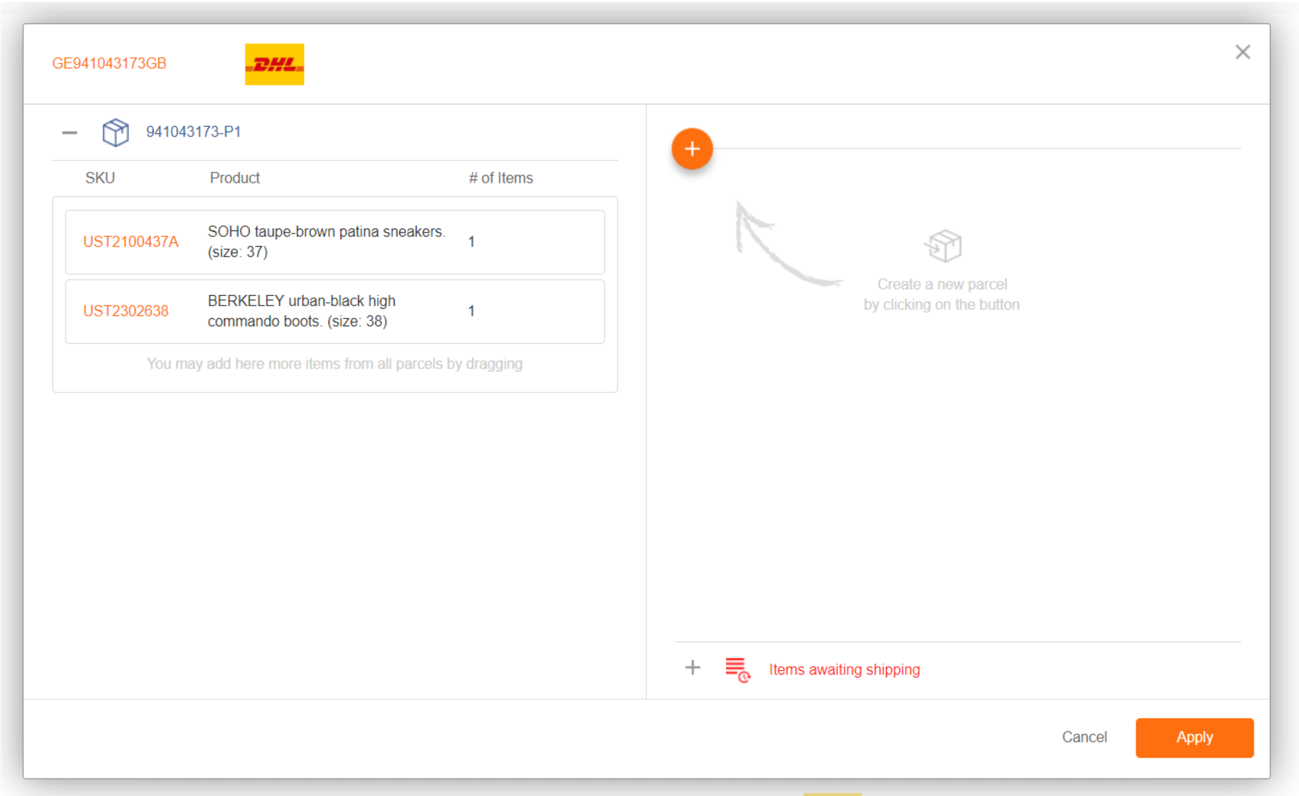


Figure: Parcel Screen

2. Click + (the + sign) to create a new parcel.

   A new parcel is generated.

3. Move items to the new parcel P2 by dragging them from parcel P1 (left) to the new parcel P2 (right).

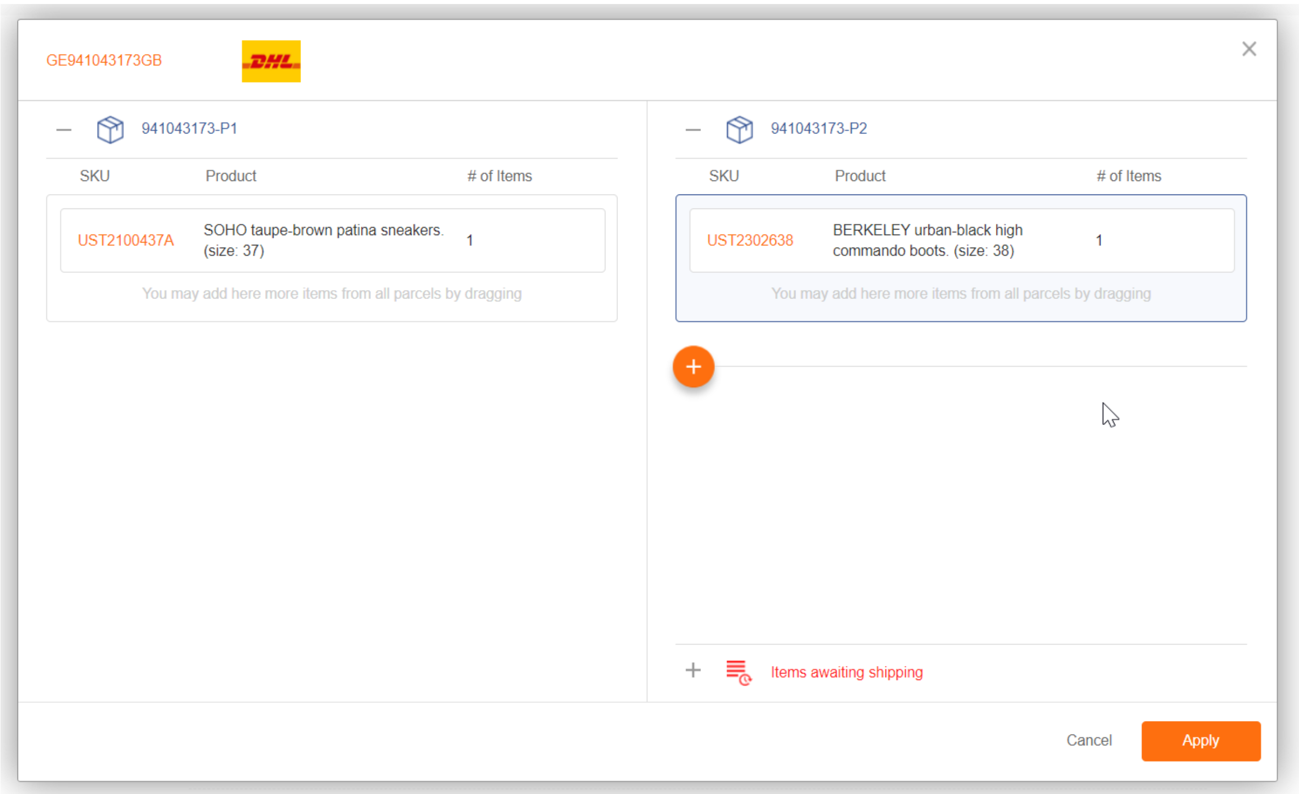


Figure: Parcel Screen – Move Items to a Parcel (P1 to P2)

To distribute items with a same product (SKU) between parcels:

a. Select an entire product SKU row and drag it from parcel (P1) to parcel (P2).
b. From the drop-down list, select the number of items to move to parcel P2.

The rest of the items remain in parcel P1.

4. Repeat steps 2 and 3 for as many parcels as needed.

   Each additional parcel denotes a consecutive suffix (P2, P3, P4, and so on).

5. Click **Apply**.

   The new parcels are saved, and the Parcel screen closes.

6. In the Process Order screen:

   a. Click on the relevant order line (#16)

   The relevant order documents are printed. Note that an Airway Bill is issued per parcel.

   b. Attach the document to your parcels.

   See Order and Shipping Documentation.

Processing Documents in Bulk

To process orders in bulk:

1. Select the checkbox next to each order to process.

   Or

   Select **All** (box) at the top of column (#7) to process all the orders on the page.

2. Click **Print Orders** (#6).

   The shipping documents of all the orders you selected are printed in bulk. If an order contains several documents (such as an airway bill and an invoice), these documents are printed consecutively followed by the next order's documents.

3. Attach the required order documents to each parcel.

See Order and Shipping Documentation for more information on the applicable shipping documentation.

Processing Split Orders

This section provides instructions on how to process an order whose content is split based on time or location.

What is a Split Order?

A split order is an order for which some items can be shipped:

- At different times – or -
- From different locations

Order items are shipped at different times when:

- Some items do not currently exist in your warehouse (pre-order, item is out of stock, and item was ordered as a backorder) - or -

- It takes additional time to prepare items per customer requirements (such as tailor-made shoes, engraving on jewellery, and more).

  In such cases, these items are shipped to the customer at a later stage, while the rest of the order's items are shipped immediately; hence the order is split.

Order items are shipped from different locations when your company works with:

- Several warehouses and different items are shipped from different warehouses.
- A warehouse and a physical store and some items exist exclusively at one location, for instance the physical store. Therefore, the items can only be shipped from that location and not from the main warehouse.

  In such cases, the order is split between several locations.

Processing Orders at different times or from different locations

- Processing orders split between different shipping times or between different locations is almost identical. In both cases, you need to treat the order as a split order and process it accordingly.

Processing Split Orders

To split an order:

1. Log in to the Global-e Merchant Portal and access the Process Orders screen (see Getting Started).
2. Click the **Order ID** of the order you wish to split (#8).

   The Parcel screen opens. See figure below.
3. Click the title **Items Awaiting Shipping** (bottom right). A red area opens; items are displayed in this area until they are ready to be shipped.
4. Move items that are not ready to be shipped from the main order (parcel P1) to **Items Awaiting Shipping**:
   - To move one item, drag and drop the item from parcel P1 to **Items Awaiting Shipping**.
   - To move several items that have the same product (SKU):
     1. Drag the entire product row from parcel P1 to **Items Awaiting Shipping.**
     2. From the drop down, select the number of items that are not ready to be shipped at the current time.

        The rest of the items remain in parcel P1.
   - To move several products, repeat the procedure in the previous bullet for each product row.

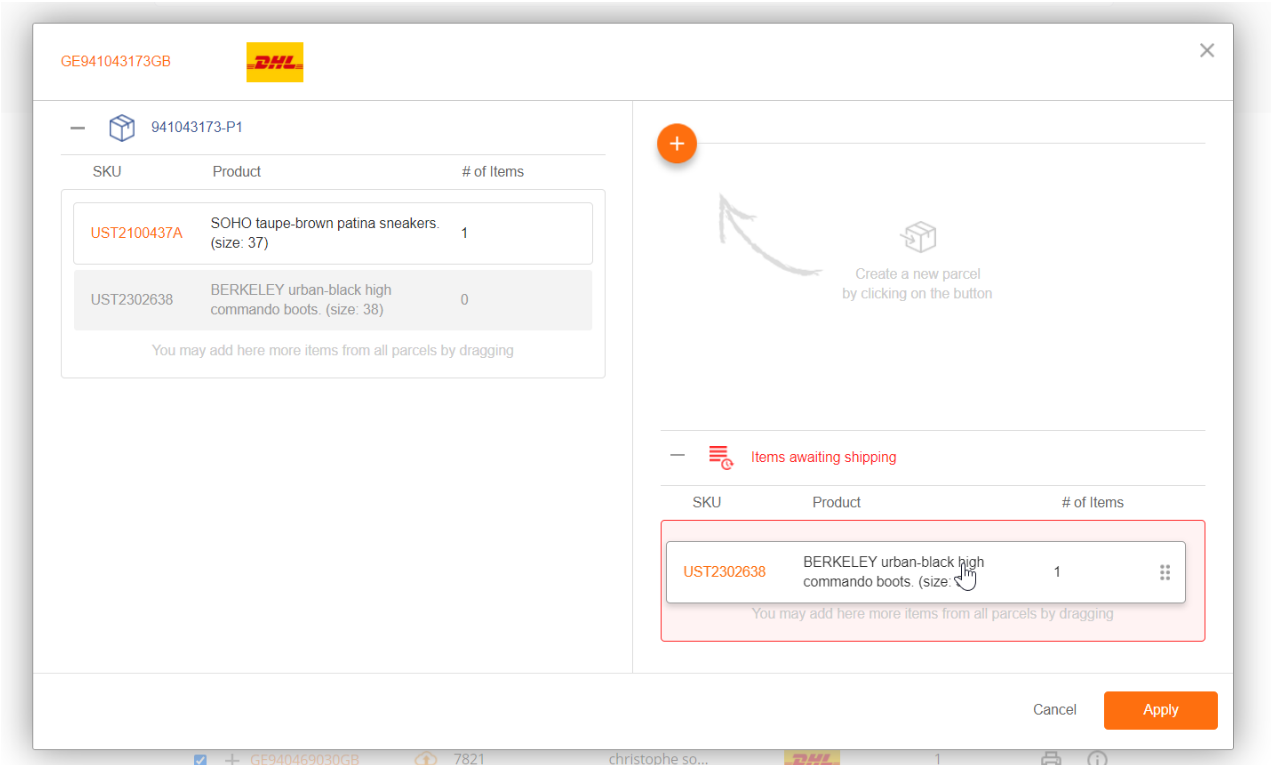


Figure: Split item – Dragging an Item to Awaiting Shipping

After you have moved all the items, the **Items Awaiting Shipping** section contains all the products that are currently not being shipped. The rest of the items remain in parcel P1.

5. If the remaining items can fit into a single parcel, leave them as is in parcel #1 (P1).

   Otherwise create additional parcels and move some of the products to these parcels. See Processing a Multi-Parcel Order for more information on managing parcels in multi-parcel orders.
6. Click **Apply**.

   In the Process Orders screen, a split order designation icon is now displayed next to your order.

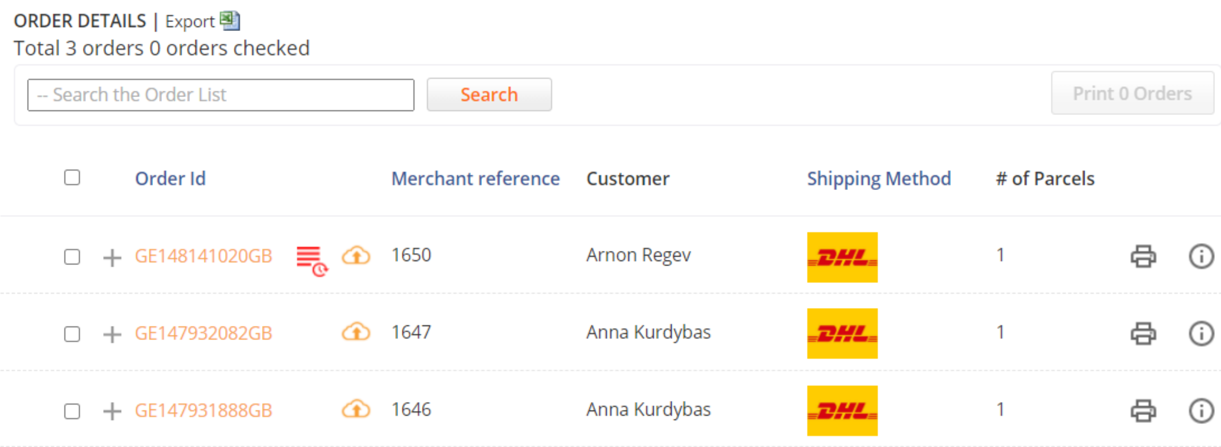


Figure: Split Order in Process Orders Screen

7. Process the split order as it is done for a regular order, by printing the order's documentation. See Processing a Regular Order.

> **NOTE**
>
> Since the order has not been fully shipped, it remains in the Process Orders list where orders are pending processing; it does not move to the Viewing Processed Orders screen, where you can view the orders that have been processed. The order moves to the Viewing Processed Orders screen once it has been fully processed and shipped.

When the items split from the order arrive at the warehouse, complete the fulfilment of the order:

1. In the Process Order screen, find the order:
   a. In the **Search** box (at the top of the orders table), enter the order number. (#5)
   b. Click **Search**.
2. After finding the order, click the **order ID** (#8).

   The Parcel Screen opens.

   The left side shows the parcels already shipped.
3. On the right side, create a new parcel by clicking + (the + sign).
4. Select the desired **Items Awaiting Shipping** and drag them to the newly created parcel.
5. Create additional parcels and drag items to the new parcel, as needed.

   Note that if some items are not ready to be shipped, you can leave them in the **Items Awaiting Shipping** section and repeat this procedure once they arrive at the warehouse.
6. Click **Apply**.

   In the Process Orders screen, a new parcel has been added to the order and it is now ready to be processed, as previously done.

   Once the documents have been printed and the order has been entirely processed, the order moves to the View Processed Orders Screen (if there are no items left to be shipped), for future reference and documents reprinting.

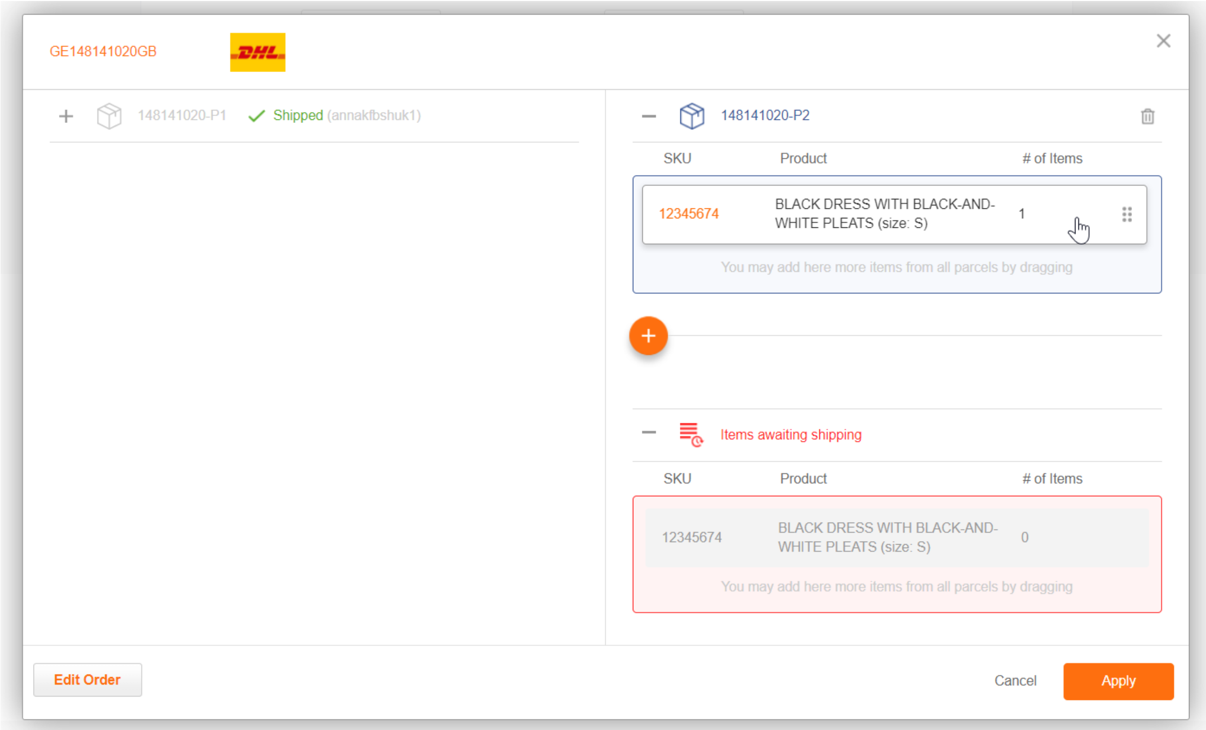


Figure: Processing Items Awaiting Shipping

Splitting and Processing an Order Distributed between Different Warehouses

The process of splitting orders containing items that are shipped from different warehouses is similar to the standard split order process with the following exception:

1. In the Process Order screen, you are prompted to select the warehouse from which you are currently fulfilling the order.

Figure: Selecting a Hub

2. Proceed with the steps detailed in the standard Processing Split Orders section.

Example:

An order contains 5 items that need to be processed but the items are available in two different warehouses.

3 items are in **warehouse A** while the remaining 2 items are in **warehouse B**.

The Operator/Manager in warehouse A:

1. Opens the Parcel Screen of the relevant order.

2. Moves (drag and drop) the 2 items that are in warehouse B to **Items Awaiting Shipping**.
3. If needed creates (+) another parcel and moves there some of the items. Otherwise all the 3 items remain in parcel 1.
4. Confirms.
5. Prints the documents.

Once **Warehouse A** is done processing the 3 items, the Process Order screen still shows this order since Warehouse B has not completed their part of the order yet.

The Operator/Manager in Warehouse B:

1. Finds the relevant orders (now designated with the Items Awaiting Shipping icon).
2. Opens the Parcel Screen.
3. Creates a new parcel.
4. Moves the 2 remaining items to that new parcel.
5. Confirms.
6. Prints the documents.

NOTE

To prevent collisions, the order is locked during the processing of one of the warehouses. Once the processing is done in one warehouse, the other warehouse can process the rest of the items.

Shipping Orders Through Different Carriers

An order can be shipped as:

- An **express** order from the merchant's warehouse (via DHL).
- A standard (non-express service) order via the Global-e hub. At the Global-e hub, the order is re-labeled and proceeds to the customer's destination via the last-mile carrier.

Shipping Express Orders: Performing the End of Day Procedure

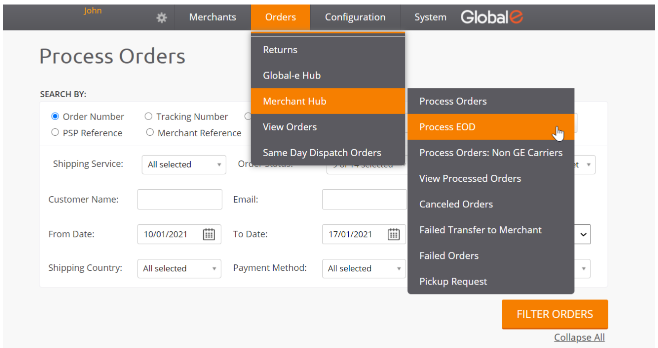
The End of Day (EOD) procedure ensures that the customer is notified that the order is on its way and gets the carrier's tracking number.

Global-e recommends that you perform the EOD procedure after the orders have been collected from the warehouse so that the customer can be notified in real time that the order is on its way.

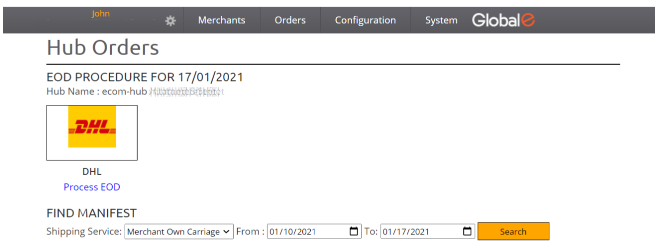
Note: if you don't have a daily pickup service, perform the EOD procedure after the orders have been picked up from your warehouse, and not necessarily at the end of each working day.

To perform the End of Day procedure:

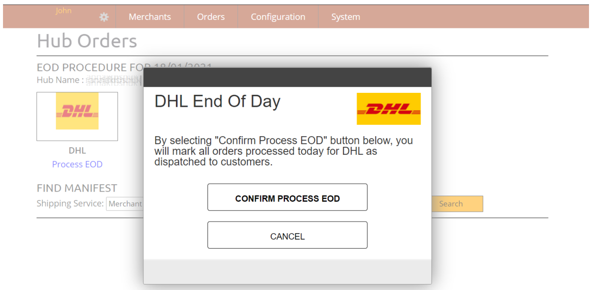
1. Navigate to **Orders → Merchant Hub → Process EOD**.



2. In the Hub Orders/EOD Procedure screen, click the **Process EOD** link.

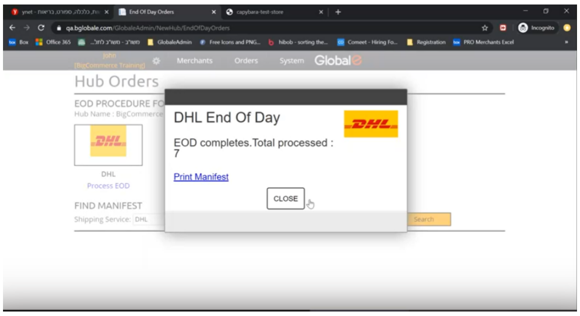


3. In the confirmation popup, click **Confirm Process EOD**.



The screen displays:

- The number of orders processed and dispatched to the customers.
- A **Print Manifest** option. You can print the manifest to use as a reference for the orders that have been processed.



The End of Day procedure is now complete. The customer is notified that the order is now on its way and of the carrier’s tracking number.

Shipping Non-Express Orders via the Global-e Hub (Standard Shipping)

Non-DHL orders do not require the EOD procedure as explained in the previous section.

Instead, ship these orders with your local carrier to the Global-e hub. At Global-e, the orders are re-labeled and handed to the final-mile carrier that will deliver them to their destination.

To ship non-express orders via the Global-e hub:

1. For each non-express order, print the domestic waybill with the Global-e hub address and logo.
2. Apply the waybill on each parcel.
3. Have your domestic carrier deliver all orders to the Global-e hub, at the address designated on the waybill.

NOTE

To shorten transit times, deliver these orders daily to Global-e hub, as early as possible.

As part of the process at Global-e hub, these orders undergo the EOD procedure; the customer is notified that the order is on its way and gets the order tracking information.

Order and Shipping Documentation

When processing orders, some or all the documents listed in this section are sent to your printer. Apply them to the package as detailed in this section.

If you are bulk processing several orders, the documents are printed per order, consecutively.

Documents:

- Express orders: DHL's Airway Bill (AWB)
- Non-express orders: The Global-e Waybill
- Commercial Invoice (if applicable)
- Packing List (if applicable)

DHL's Airway Bill (AWB) (Express Orders)

The **airway bill (AWB)** accompanies parcels shipped by international express courier (DHL).

The airway bill contains the shipping information, the customer's address and the shipper's details and logo.

This document is usually printed on a sticker, using a label printer. Attach the AWB to the parcel; if there is more than one parcel, attach one on each parcel.

Example of an AWB

Figure: DHL AWB Example

Global-e Waybill (Non-express Orders)

The Global-e waybill accompanies parcels shipped through the Global-e hub in your country. These parcels are cross-doc'ed (relabeled) upon processing in the Global-e hub and proceed with the relevant shipper to their destination.

The waybill contains the Global-e hub full address and usually the Global-e logo, as well as the order information.

Apply the waybill to each parcel to be sent to the Global-e hub.

Example of a Global-e Waybill

Figure: Global-e Waybill Example

Commercial Invoice

The invoice is a necessary document for customs clearance when the order is shipped abroad. The invoice is printed after the waybill. Only one invoice is generated even if the order has more than one parcel.

Place the invoice inside a pouch and attach it to the parcel. Make sure that the invoice content is clear and visible.

Invoices **are NOT printed**:

- If the order is of PLT type (Paperless Trading policy), the invoice information is transmitted electronically by the shipper at the customs. In that case, a cloud indication ( ) is displayed next to the order in the Process Order Screen (#11).
- If an EU merchant ships within the EU, clearing customs is not needed and therefore the invoice is not printed.

Example of an Invoice

COMMERCIAL INVOICE	
Shipper/Exporter of Record	**SHIPMENT/ORDER**
Globale UK Limited Address: 154 Clerkenwell Road London, EC1R 5AB Email: service@global-e.com VAT Reg. No.: 177 9006 80 EORI number: GB177900680000 Shippers address: Global-e/ecom-hub Untamed Street Haul and Store Unit 17 Admiralty Way Camberley, GU15 3DT United Kingdom	Invoice #: 00000000000007565593 Date: 2021-01-15 Order ID: GE936712317GB Number of parcels: 1 Total actual weight: 2.4100 kg Total dimensional weight: 2.4100 kg Currency of sale: US Dollar
SHIP TO/CONSIGNEE	**SOLD TO PARTY**
[redacted] 634 High Lake Dr Louisiana, Baton Rouge, 70810-4337 United States 2259396746 [redacted]	Importer type: Private importer [redacted] 634 High Lake Dr Baton Rouge, Louisiana, 70810-4337 United States 2259396746 [redacted]

Description	HS Code	Country of Origin	Units	Unit value	Total value
YORK rich-cocoa welted chukka boots. – Footwear, gaiters and the like; parts of such articles	640391	Italy	1	$ 490.00	$ 490.00

Do not clear different commodities under a single HS code. Use HS commodity codes as provided.

Notes on import duty & taxes due	Totals	
	Total cost of goods (FOB) Shipping & handling Insurance charges	$ 490.00 $ 5.00 $ 0.00
	Total (CIF)	$ 495.00
VALUE FOR CUSTOMS:	**FOB**	**$ 490.00**

These commodities, technology or software were exported from United Kingdom in accordance with the local export regulations. Diversion contrary United Kingdom is prohibited.I declare that all the information contained in this invoice to be true and correct.
Printed Name: Shahar Tamari, Date: 2021-01-15

Figure: Invoice Example

Packing List

The Packing list shows the entire content of the order and usually helps you in the pick and pack process. You can also add it to the order as a reference for the customer. This document bears the merchant’s logo.

NOTE

The packing list is **not** generated by default as part of the order documentation. Contact Global-e to obtain this document.

Example of a Packing List

MERCHANT LOGO

Global-e

Powered by Smart Cross-Border™

PACKING LIST	
SHIP TO/CONSIGNEE	**SHIPMENT/ORDER**
[redacted] 113 WALDON ST BRENTWOOD California 94513-6212 United States [redacted]	Order : 26158 Global-e Reference : GE938509436GB Order Placed : 2021-01-18 Number of parcels : 2 Number of items : 3

Description	Qty
PREORDER: Evil Eye Necklace - Gold – Natural or cultured pearls, precious or semi-precious stones, precious metals, metals clad with precious metal, and articles thereof; imitation jewellery; coin	1
Reflect Topaz Drop Necklace - Gold – Natural or cultured pearls, precious or semi-precious stones, precious metals, metals clad with precious metal, and articles thereof; imitation jewellery; coin	1
Protection Chain Necklace – Natural or cultured pearls, precious or semi-precious stones, precious metals, metals clad with precious metal, and articles thereof; imitation jewellery; coin	1

Figure: Packing List Example

Additional Information

The following section describes how to:

- Use the filter section in the Process Orders screen
- Amend an order line item
- Cancel an order
- View processed orders

Using Filters

Use filters to narrow down the list of orders shown by default in the Process Order screen.

To apply filters:

1. At the top of the Process Orders screen, in the filter section, select a filter option.

   The following filter options are commonly used:
   - **From Date/To Date** range of the order creation date
   - **Customer Name** or **Email** address
   - **Shipping service** (carrier)
   - **Shipping Country**
2. Enter the relevant value.
3. Click **Filter Orders** (#2).

The orders are filtered according to the filter parameters you selected.

Looking for a Specific Order

To access the Order Details screen of a specific order (subject to permissions):

1. In the Process Orders screen, at the top of the filter section:
   - Select **Order Number** and enter the requested Global-e order number in the search box (#1).

   Alternatively:
   - Select **Tracking Number** and enter the carrier's tracking number into the search box (#1).
   - Select **Merchant Reference** and enter the e-Commerce platform order number into the search box (#1).
2. Click **Find and View** (#1).

The Order Details screen is displayed showing the details of the order.

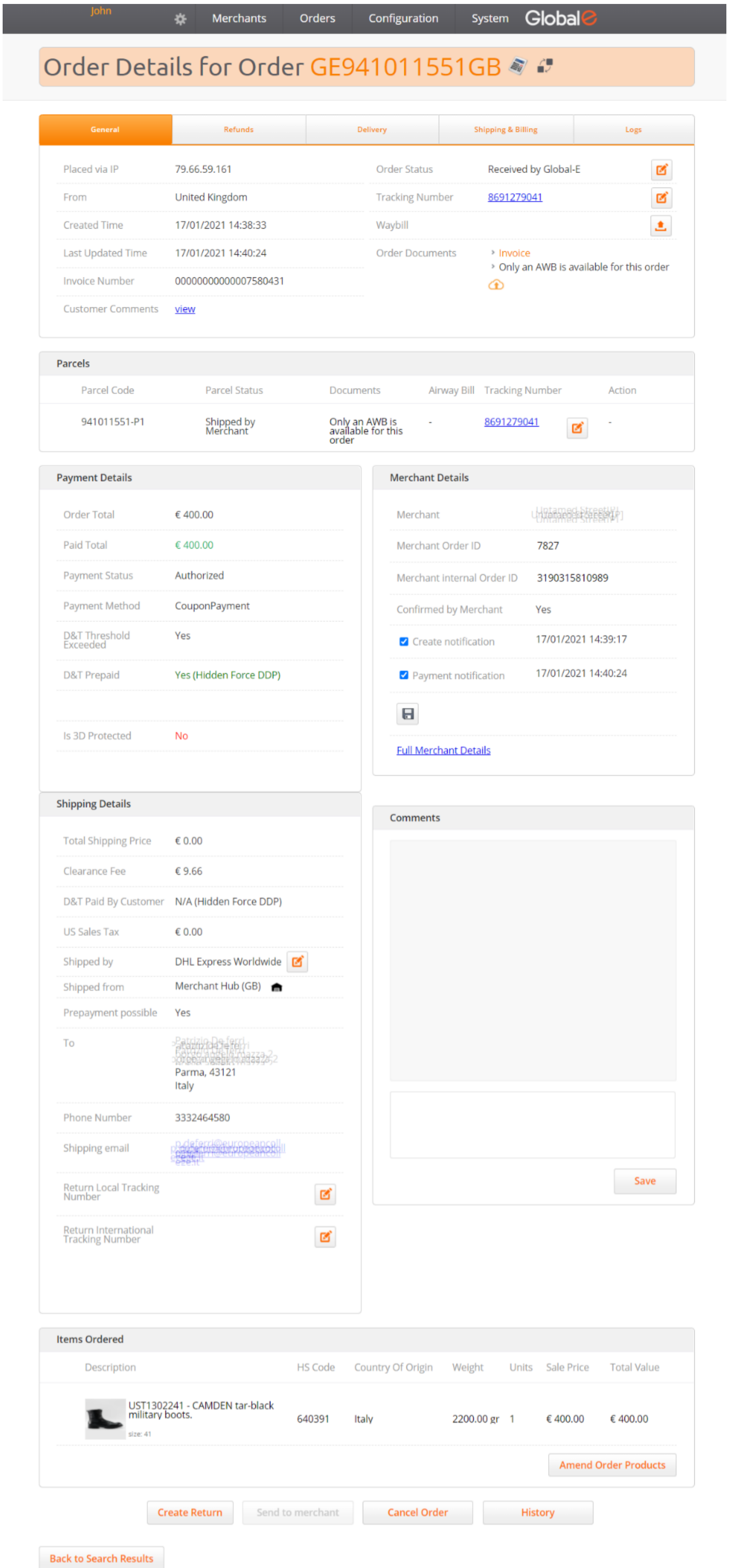


Figure: Order Details Screen

Amending Order Line Items and Quantities

If the order contains out of stock items, you must amend these items before printing the Airway Bill (AWB) and export documents.

Amending the order via the Global-e Merchant Portal:

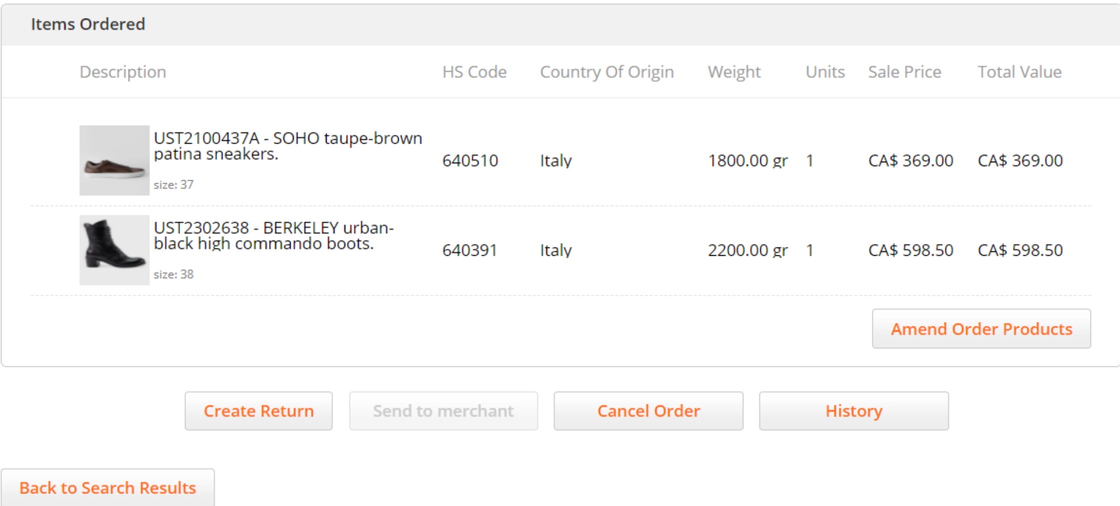
- Triggers an automatic refund of all the relevant amounts
- Updates export documents
- Updates the shipper’s AWB
- Sends an email to the customer, notifying them of out of stock items and refunds

  Note: Amending an order can only be performed by a CS admin role that has the permissions to perform this action.

To amend the order:

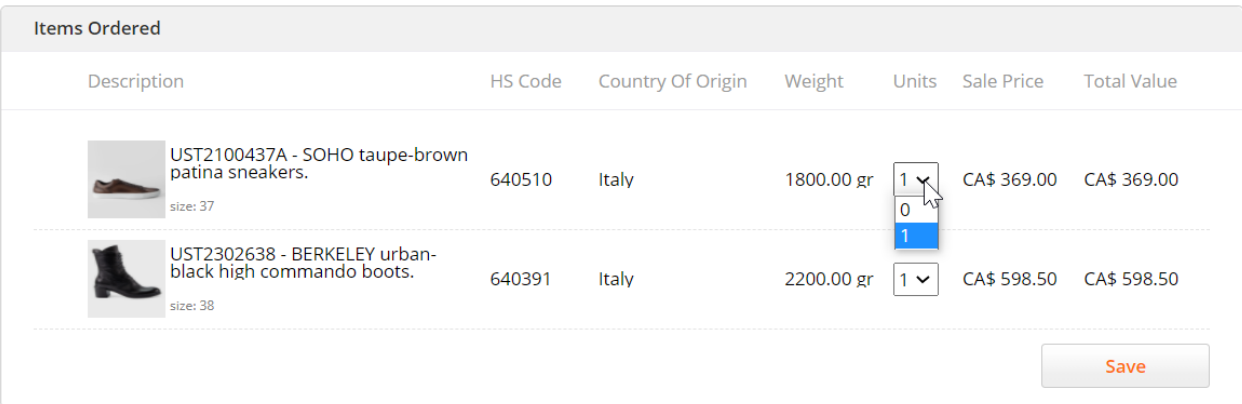
1. On the Order's Details Screen General tab, scroll down to the **Items Ordered** area at the bottom of the page.

   The **Items Ordered** area contains the order line items and quantities.



2. Click **Amend Order Products**.

   All product quantities become editable.

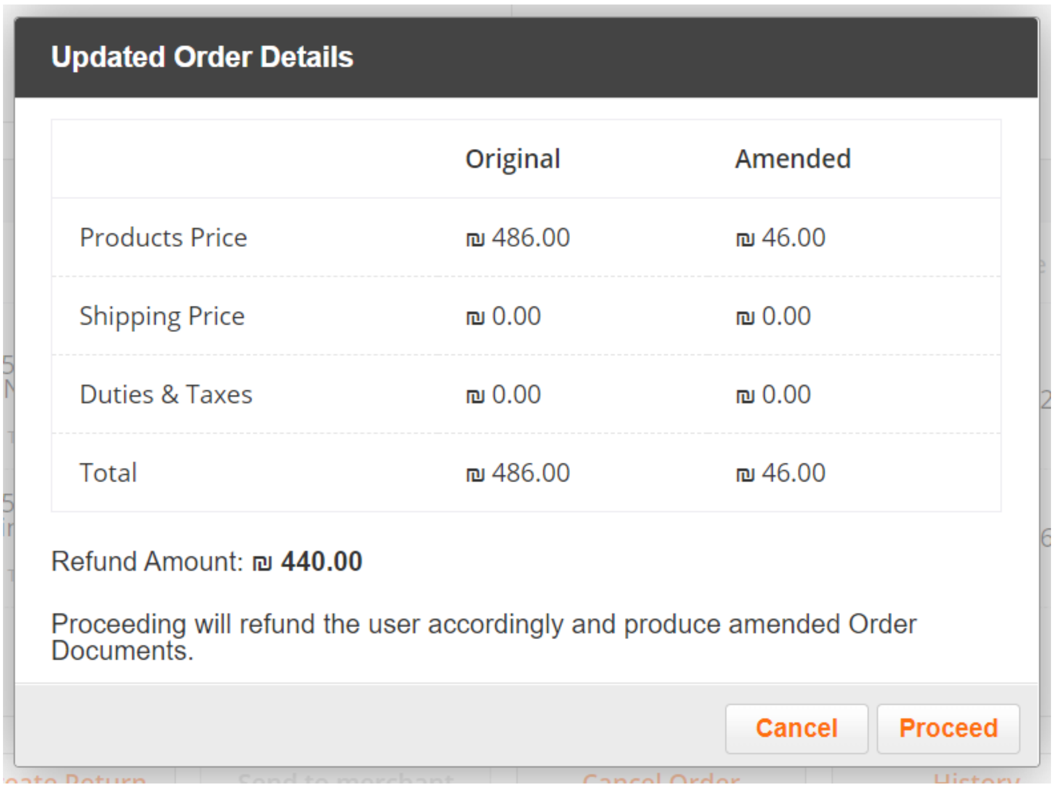


3. Update the relevant line item quantity.

> **NOTE**
>
> You can only reduce the quantity of an item; you cannot increase it. When the quantity of an item is reduced and saved, it is a permanent change and you will no longer be able to increase the quantity to its former amount.

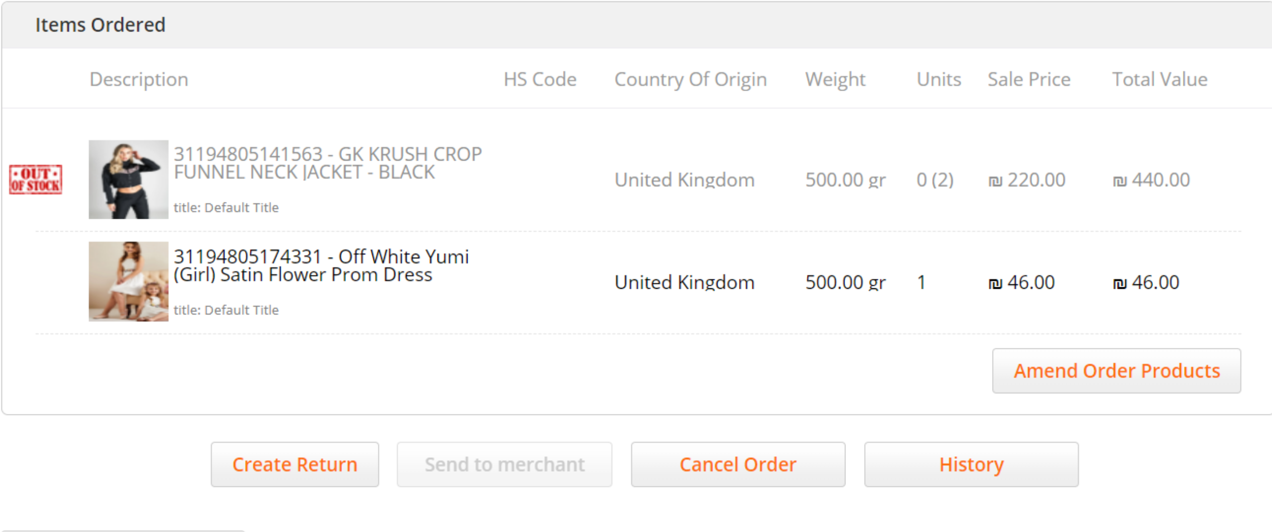
4. Click **Save**.

   The Updated Order Details confirmation pop-up opens indicating the original amounts paid by the customer, the amounts after the order was amended, and the refund amount is also displayed.



5. Click **Proceed** to continue or **Cancel** to close the confirmation pop-up without amending order quantities.

   The Items Ordered list shows:
   - The amended item and new quantities.
   - The updated quantity under **Units** and the original quantity in parentheses ().



Canceling Orders

At times, all the order's products are out of stock; alternatively, the order may consist of a single product that is out of stock. In these cases, the entire order should be canceled.

IMPORTANT

An order and its shipping documentation cannot be canceled after being processed.

- Canceled orders are filtered out of the reports
- For each order cancellation, an automatic refund is issued for the full order amount or for the captured amount.

Canceling the order via the Global-e Merchant Portal:

- Triggers an automatic and full order refund
- Sends an email notifying the customer about the cancellation

To cancel an order:

1. Under the Order Details Screen General tab, scroll down to the bottom of the page and click **Cancel Order**.

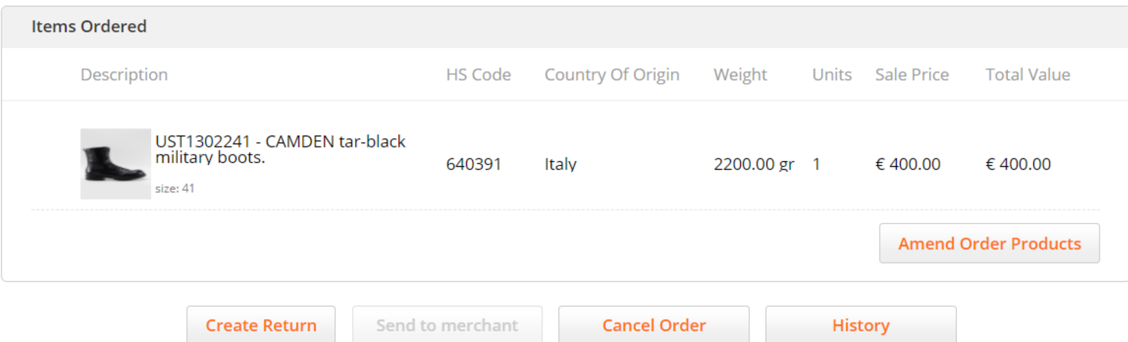


Figure: Cancel Order

2. From the drop-down menu, select Out of stock as a cancellation reason.

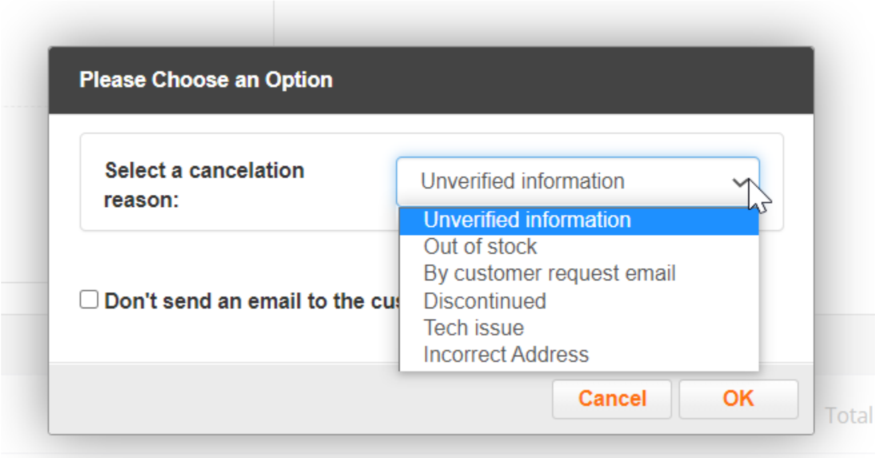


Figure: Confirm Order Cancellation Reason

By default, an email is sent to the customer, notifying them about the order cancellation.

Select **Don’t send an email to the customer** if you wish to avoid sending an email.

3. Click **OK**.

Viewing Processed Orders

Use the View Processed Order screen to track a processed order and reprint the order’s documents if needed.

To view processed orders:

1. In the Global-e Merchant Portal, navigate to: **Order → Merchant Hub → View Processed Orders**

Figure: Accessing the View Processed Order Screen

2. Reprint the documentation, as was done for a regular order:
   - To reprint an individual order documentation, click on the relevant order line (#16).
   - To reprint several orders' documentation in bulk, click **Print Orders** (#6). See Processing Documents in Bulk.

   The applicable order documents are printed. Note that an Airway Bill is issued per parcel.
3. Attach the document to your parcels.

   See Order and Shipping Documentation.