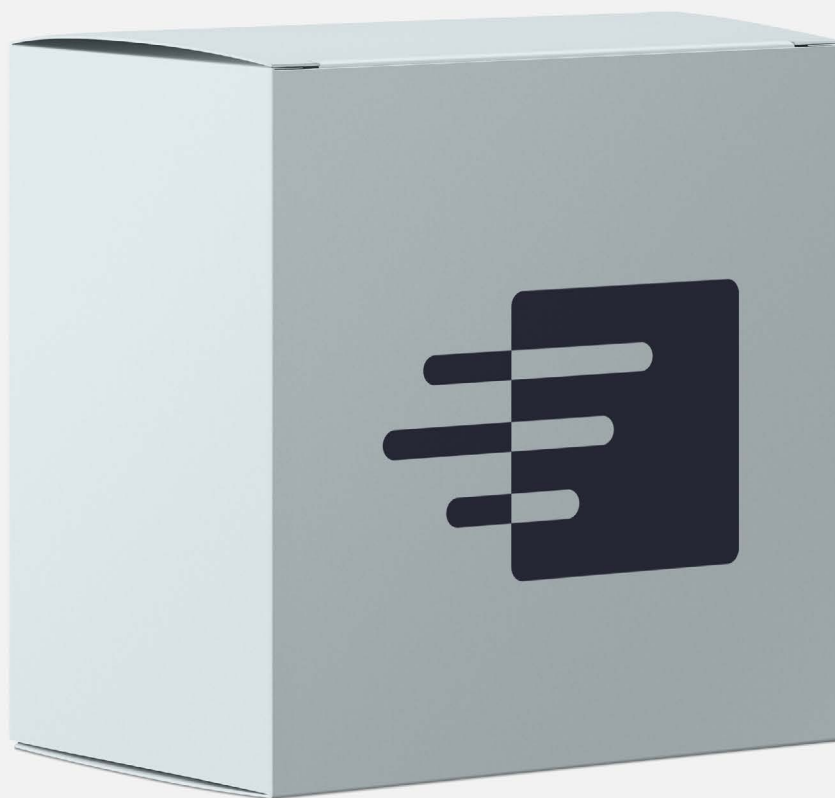




CREATING A **PROJECT**



Giving brands the best tools possible for  
**building a successful eCommerce operation**

# CREATING A PROJECT

Projects are useful in many different ways - from **kitting** your products, to adding **additional paperwork**, or simply gathering some **new photos** of your products, Projects are used when the normal pick and pack solution doesn't fit your needs.

If you're looking for more attention to detail for a big shipment to a retailer, our amazing Project teams can get it done.



## HERE'S A FEW SITUATIONS WHERE A PROJECT SHOULD BE CREATED:

- Total shipment quantity exceeds a full case quantity
- There are specific instructions to be followed that go outside the normal circumstances (ex. Please unbox SKU A to create SKU B and ship out)
- There is a need to kit and assemble units and/or break down full cases to single units
- An action is required for product that cannot be completed via normal processes (please take photos of SKU A, please check expiry dates)

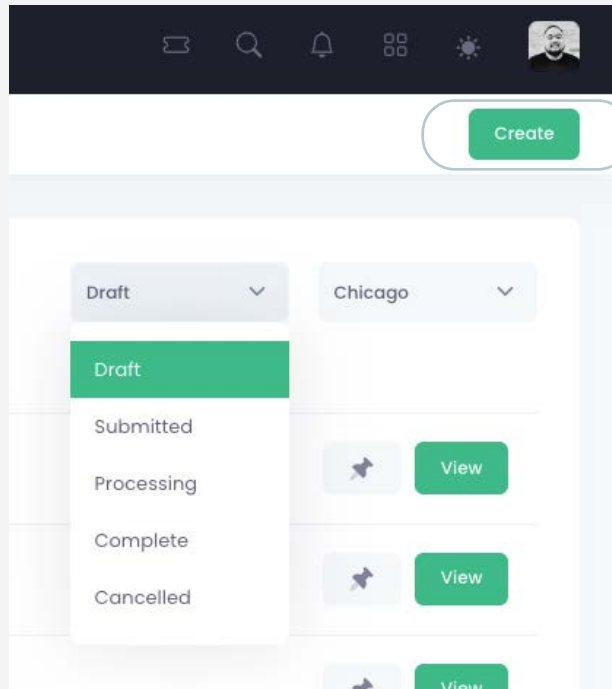
Under the **Projects tab** from the main menu, you'll be brought to the main **Projects page**. If you've created projects before, they will be listed already and can be filtered from the right hand side by warehouse location or status. On the left, you can search by specific information to locate a project:

Projects						Create
Home - Manage Projects						
Q Search						
PROJECT ID	DATE CREATED	PROJECT NAME	WAREHOUSE	TOTAL TASKS	STATUS	
764298044	21 Jul 2022 104 days ago	Wholesale PO 0009	Chicago	3	Draft	View
1512645413	21 Jul 2022 104 days ago	sdfasldasd	Chicago	0	Draft	View



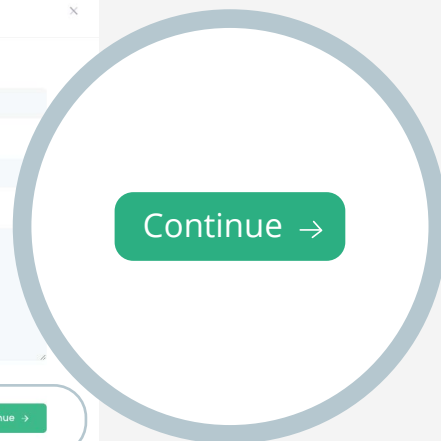
# METHOD 1:

## CREATING A PROJECT FIRST



To create a project, choose the **Create** button in the top right:

From the popup window, enter the name of your project, the warehouse location where the project should be completed, and description. Use the Project Description text box to provide a clear and short summary of the project (this helps with additional background and context). Also, do not add any actionable instructions (that's what tasks are for!) in this field. Once all of that has been done, select the **Continue** button:





If applicable, enter your (already created) shipment ID to be linked to the project. A reminder that if you are kitting SKUs (ex. SKU A + B = SKU C) or shipping product, you must have a shipment added to your project. If you need to add this at a later date, you can come back to the project and link the project before submission.

Once you have entered your shipment ID, select the **Continue** button:

The screenshot shows the 'Create Project' form with three steps: 1. Project Details (checked), 2. Shipment (active), and 3. Date. The 'Shipment ID' field is empty. Below the field, there is a note: 'If you would like to link a shipment, add the Shipment ID. This can be done at any stage.' At the bottom, there are two buttons: 'Back' and 'Continue'. The 'Continue' button is highlighted with a large blue circle.

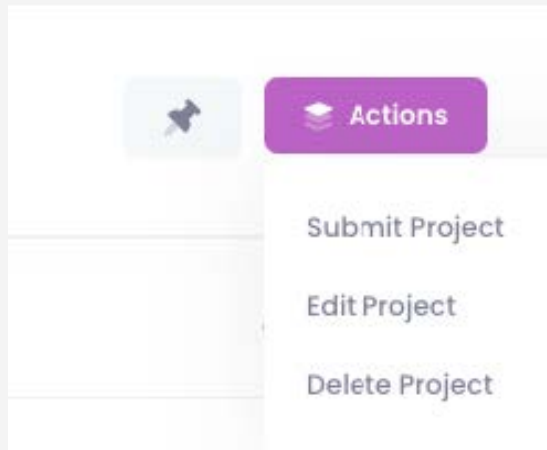
Select the date you would like the project completed on. Please note that a date may not be available for you depending on what is already in the projects queue. If you need a specific date or a project is urgent, please speak to your account manager or reach out to the project manager for assistance. Our team will do our best to accommodate your requests.

The screenshot shows the 'Create Project' form with three steps: 1. Project Details (checked), 2. Shipment (checked), and 3. Date (active). The 'Requested Completion Date' field shows '07 Nov 2022'. Below the field, there is a calendar for November 2022. The date '07' is highlighted with a blue circle and labeled '1'. The 'Create Project' button is highlighted with a blue circle and labeled '2'. At the bottom, there is a footer with 'FBA Shipment 00008' and 'Draft'.





Once you have selected a date, you can select **Create Project**. A new popup window will appear to go over your project details. At this point, your project is in Draft status, which means that it has not been submitted to the team for review, and changes can be made on your end to any details of the project:



To ensure you submit a project, please view the details of your project and select the **Action button > Submit Project**. If you do not do this, the project team cannot view or accept it!

If any clarification is needed, or more information is required, a member of the Projects team will reach out to you.

To view information on a project, you can select the corresponding **View** button and a popup will provide you with an overview of the project and its information:

**Project: 1080584495** ✕

📌 ⚙️ Actions

Project Details Tasks Followers

Title	Test Project
Project Status	<b>Draft</b>
Shipment ID	-
Warehouse	Chicago
Creation Date	02 Nov 2022 - 11:10am
Created By	John Baring
Requested Completion Date	07 Nov 2022





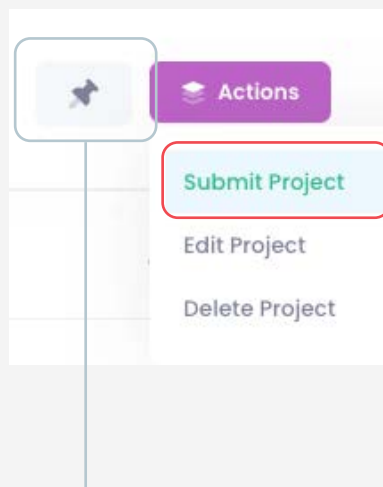
You can see all of the general details of the project under the **Details tab**, such as the status, shipment ID, warehouse location, and creation date.

Any tasks you have added to the project will show under the **Tasks tab**. Tasks are mandatory and we require at least 1 task added to the project - think of tasks like instructions you are giving to our Projects team. You can also only add tasks while the Project is in the Draft status, otherwise, once it has been submitted, you can no longer edit, remove or add tasks. If you need to add attachments to a task (such as labels) you can select the **paperclip icon** next to the specific task to upload them. If you need to re-order your tasks, you can select the up or down buttons to move the tasks into the correct order.

You can add Followers to stay updated on your project under the **Followers tab**. Just start typing their name and select the person's name in question.

Under the **Actions button**, you can see the options to Edit, Submit, or Delete a project.

**A reminder that you must make sure your project is submitted, or it will not be worked on or seen by the projects team.**



If you would like to pin your project to your Pins widget on your dashboard, you can click on the Pin icon beside the Actions button.

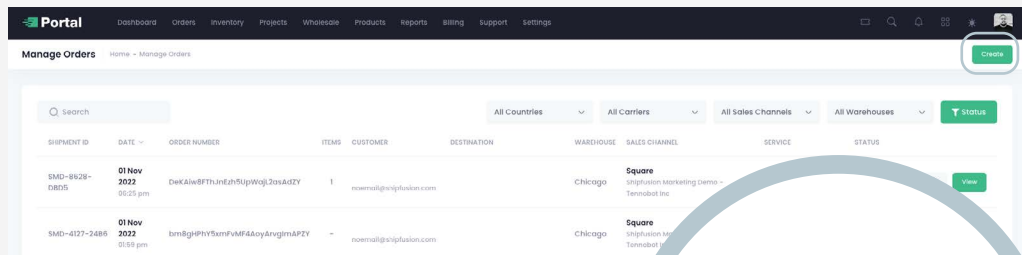


# METHOD 2:

## CREATING A SHIPMENT FIRST PROJECT



Go to **Orders > Manage Orders** then click the **“Create”** button on the right side of the page.



Create

A pop up creation window will appear and will prompt you to fill out the shipment details step-by-step. If the intended project is not to be shipped anywhere and instead be used solely for the purpose of allocating units for the project tasks, then **fill out the required address fields** with placeholder text such as “PROJECT” and “noemail@shipfusion.com” to allow you to continue to the next step, as shown below:





Select the appropriate SKUs and the corresponding quantities

**Create Order**

1 ☒ Address Info  
The destination to send the shipment

2 ☒ Add Products  
Add products to the shipment

3 ☐ Carrier & Service  
Choose a delivery service

4 ☐ Confirm Shipment  
Make sure everything is correct

5 ☐ Completed  
Shipment Submitted

Which Item(s) Would You Like to Add to Your Order?

Item(s) in Your Order

PRODUCT	INVENTORY	QTY	ACTIONS
4561236666 QA ITEM ONE VARIATION - Variation 1	0	1	<input type="button" value="Add"/>
7890HI Pocket Socket Stone - Regular	0		<input type="button" value="Add"/>
CBD-SI-B1020 CBD Drops	1570	50	<input type="button" value="Add"/>
Ear-Sy-B1Wh20 In-ear Transphonics	1156	1	<input type="button" value="Add"/>
Hair-CI-LaB120 Hair Clip - Hot Pink	1062	25	<input type="button" value="Add"/>

PRODUCT	QTY	ACTIONS
CBD-SI-B1020 CBD Drops	50	<input type="button" value="Remove"/>
Hair-CI-LaB120 Hair Clip - Hot Pink	25	<input type="button" value="Remove"/>

Select the Carrier/Service. If the project is not to be shipped out, then select the option "Shipfusion will determine the most efficient carrier" to allow you to continue.

**Create Order**

1 ☒ Address Info  
The destination to send the shipment

2 ☒ Add Products  
Add products to the shipment

3 ☒ Carrier & Service  
Choose a delivery service

4 ☐ Confirm Shipment  
Make sure everything is correct

5 ☐ Completed  
Shipment Submitted

☒ Shipfusion will determine the most efficient carrier

☐ I will choose my carrier

Review shipment details, then click **"Submit"** to complete creation of the shipment.







Once submitted, click **"View Order"** to take you directly to your created shipment.

The screenshot shows the 'Create Order' page with a progress bar at the top indicating five steps: Address info, Add Products, Carrier & Service, Confirm Shipment, and Completed. The 'Order Submitted!' message states 'Your order has been submitted'. Below this is a green truck icon with a checkmark. At the bottom, there are two buttons: 'Create New Order' and 'View Order'. The 'View Order' button is highlighted with a large blue circle.

While viewing the shipment, go to Actions and click **"Create a Project"** and follow the Project creation process as instructed above.

The screenshot shows the 'Create Project' form. At the top, there is an 'Order' header with a breadcrumb trail: Home > Orders > 5461-8288-4763. Below this is a progress bar with four stages: Order Created, On Hold, In Process, and Shipped. The 'On Hold' stage is currently active. To the right of the progress bar is an 'Actions' menu with options: Resubmit, Cancel, Create Project, Create Wholesale, and Reworked. The 'Create Project' option is highlighted with a large blue circle. Below the progress bar is a 'Create Project' button, also highlighted with a large blue circle. The main form area is titled 'Create Project' and contains three sections: 1. Project Details, 2. Shipment, and 3. Date. The 'Project Details' section includes fields for 'Project Name' (with a red asterisk), 'Warehouse' (with a red asterisk), and 'Project Description' (with a red asterisk). The 'Project Name' field contains 'Test Project', the 'Warehouse' dropdown is set to 'Chicago', and the 'Project Description' field contains 'Description of Project'. At the bottom right of the form is a green 'Continue' button with a right arrow.



