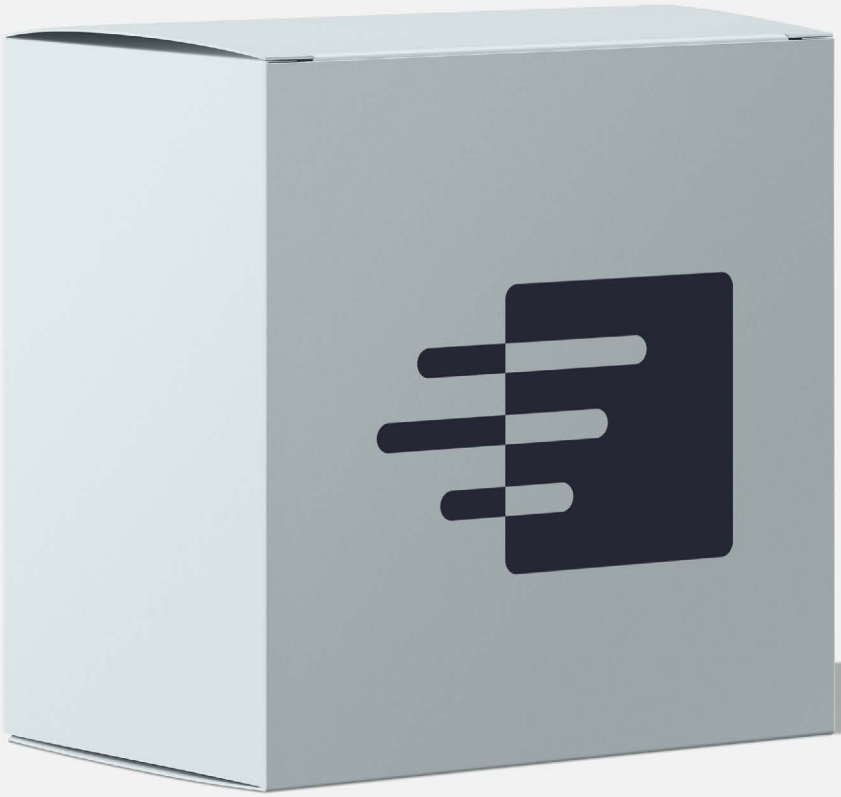
Shipfusion

CREATING A **PROJECT**



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

CREATING A **PROJECT**

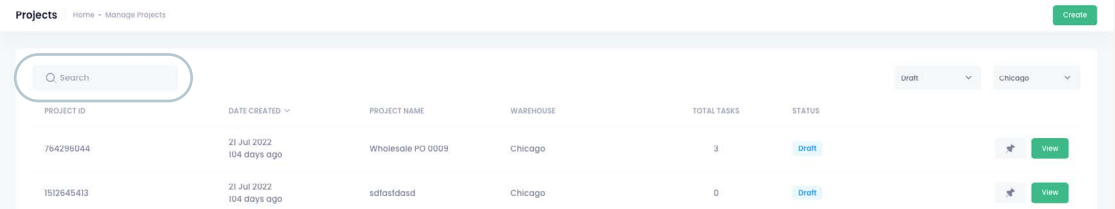
Projects are useful in many different ways - from **kitting** your products, to adding **additional paperwork**, or simply gathering some **new photos** of your products, Projects are used when the normal pick and pack solution doesn't fit your needs.

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

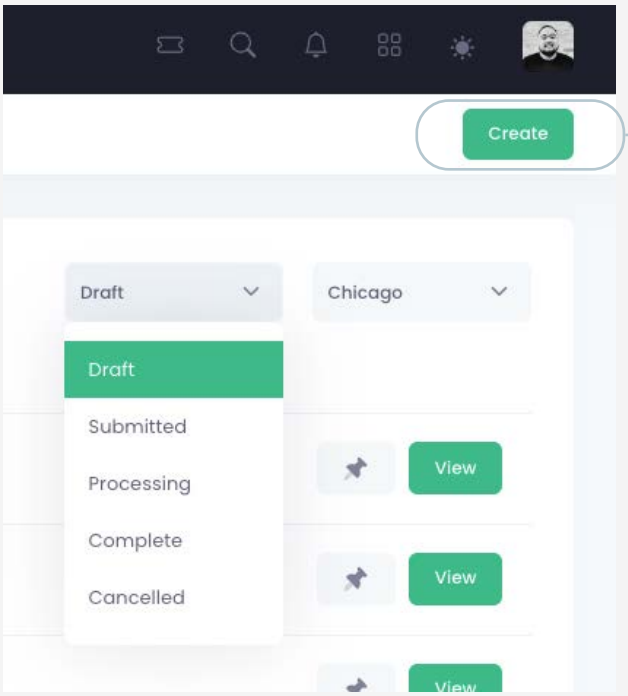
HERE'S A FEW SITUATIONS WHERE A PROJECT SHOULD BE CREATED:

- 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:

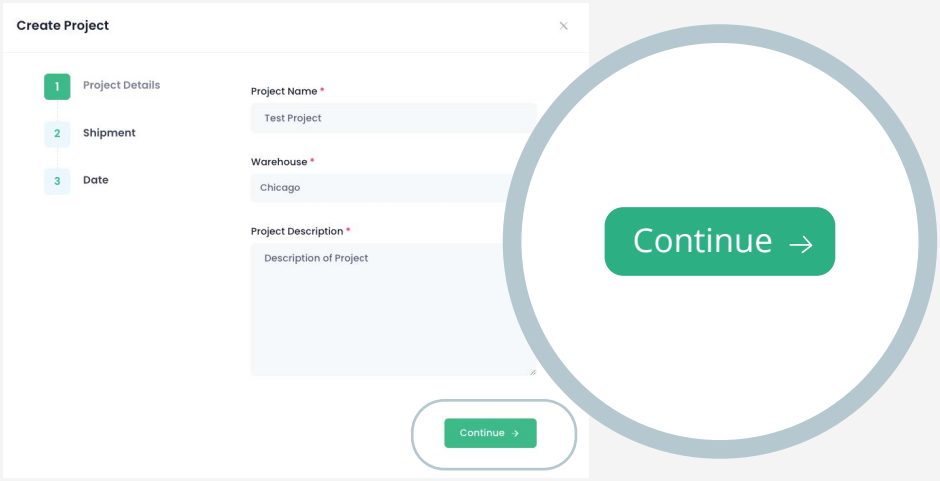


METHOD 1:
CREATING A PROJECT FIRST



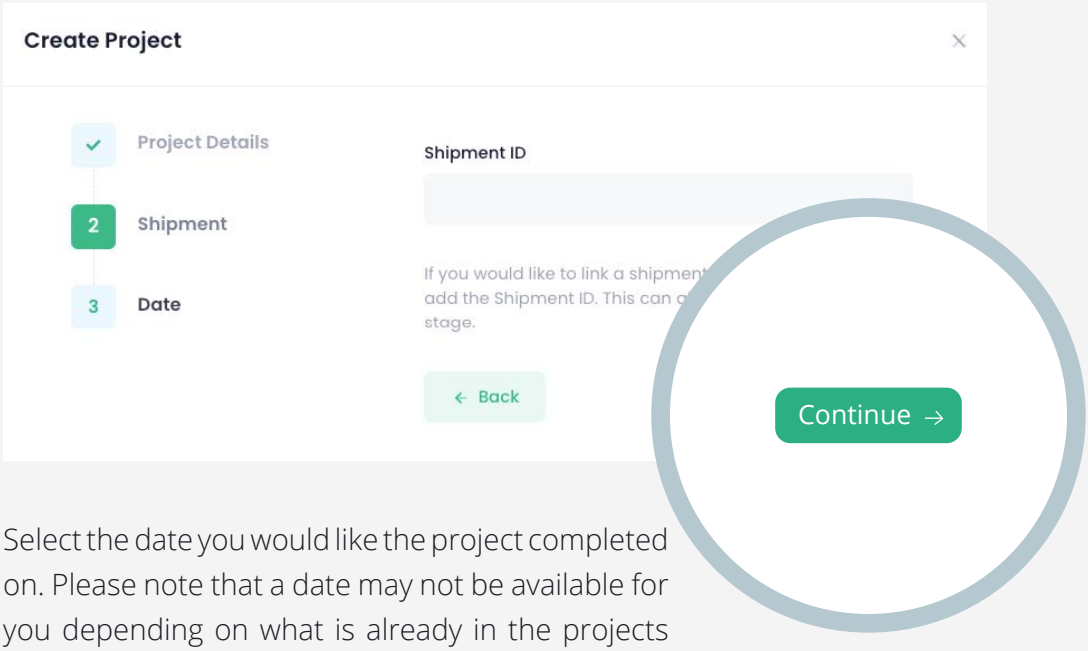
To create a project, choose the **Create** button in the top right:

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:

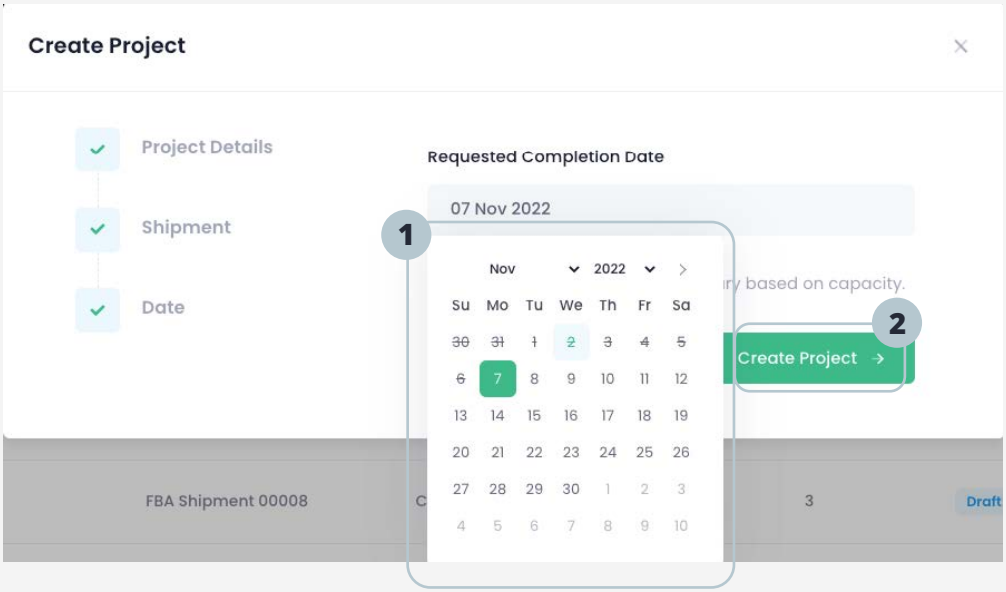


If applicable, enter your (already created) shipment ID to be linked to the project. A reminder that if you are kitting SKUs (ex. SKU A + B = SKU C) or shipping product, you must have a shipment added to your project. If you need to add this at a later date, you can come back to the project and link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

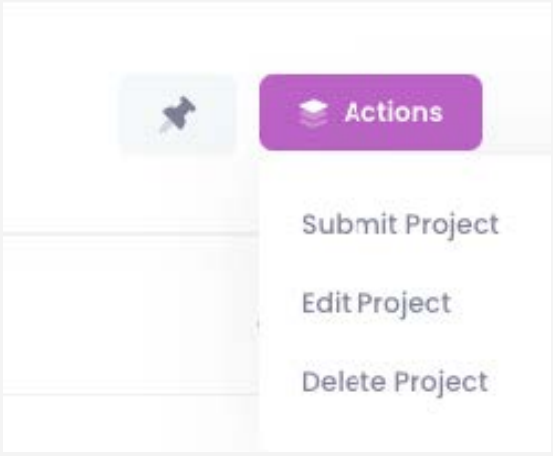
Once you have entered your shipment ID, select the Continue button:



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.



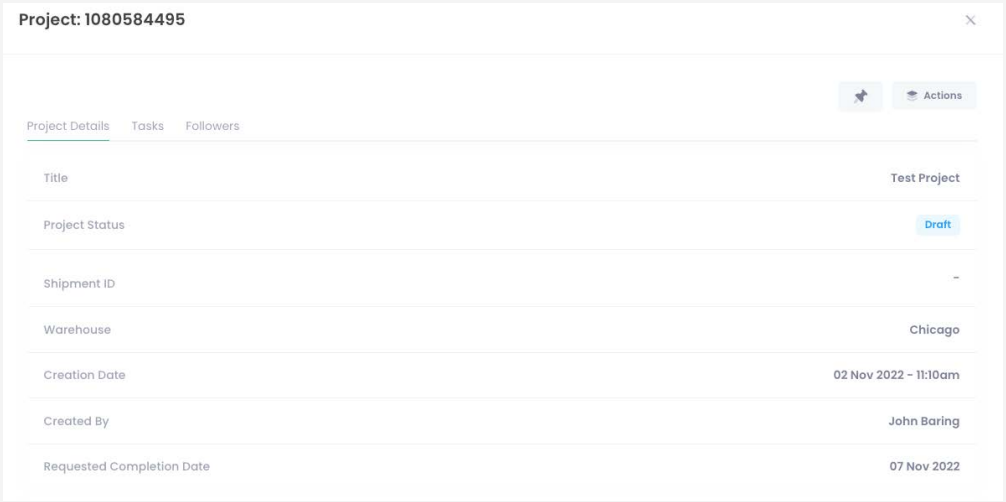
Once you have selected a date, you can select **Create Project**. A new popup window will appear to go over your project details. At this point, your project is in Draft status, which means that it has not been submitted to the team for review, and changes can be made on your end to any details of the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



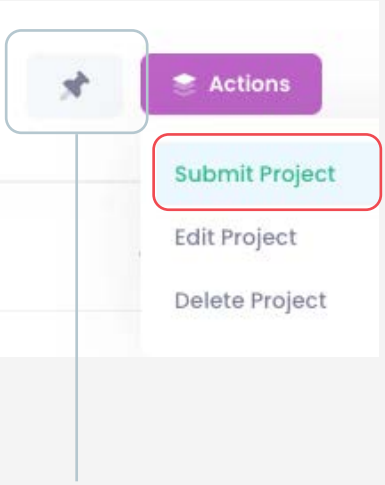
You can see all of the general details of the project under the **Details tab**, such as the status, shipment ID, warehouse location, and creation date.

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.

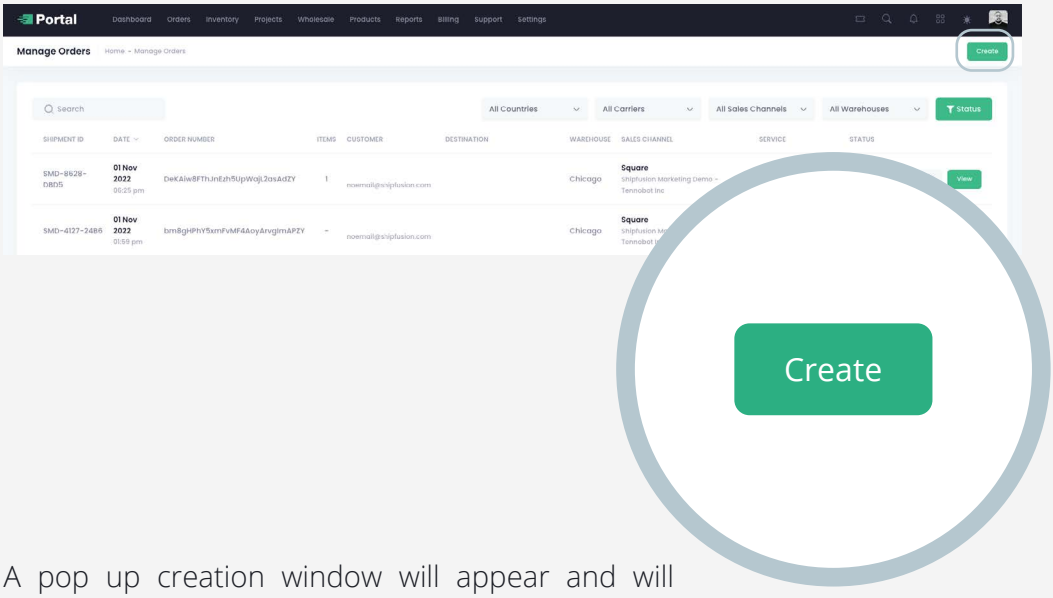
A reminder that you must make sure your project is submitted, or it will not be worked on or seen by the projects team.



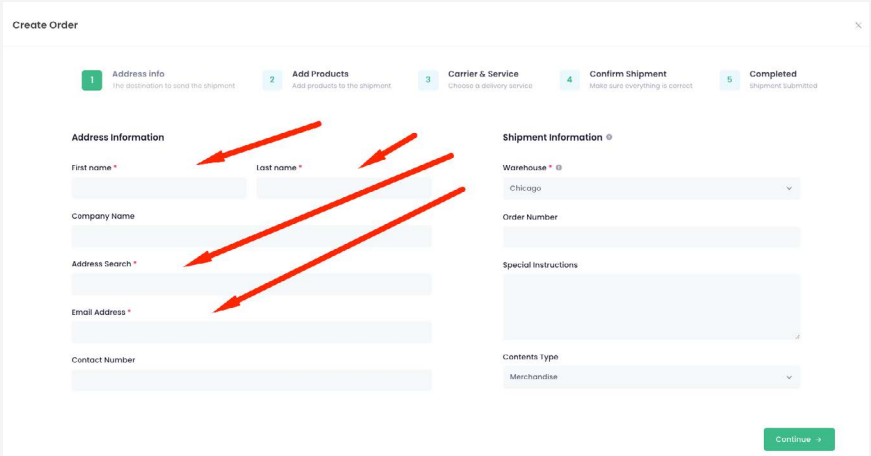
If you would like to pin your project to your Pins widget on your dashboard, you can click on the Pin icon beside the Actions button.

METHOD 2:
CREATING A SHIPMENT FIRST PROJECT

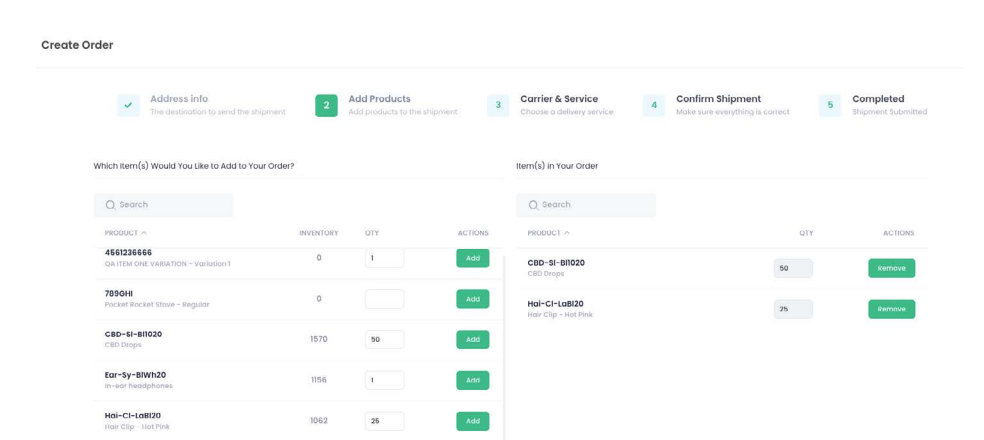
Go to Orders > Manage Orders then click the "Create" button on the right side of the page.



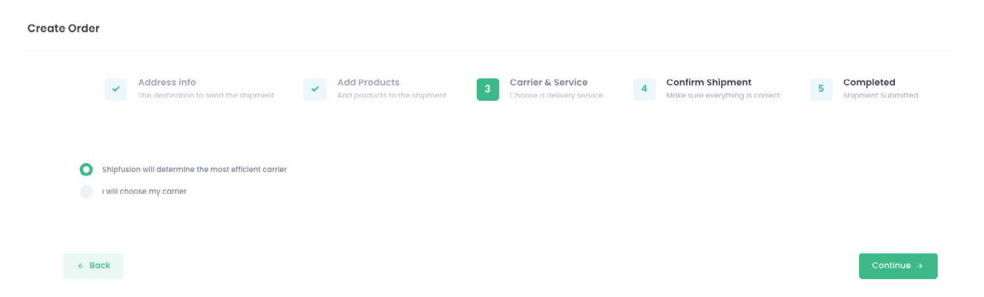
A pop up creation window will appear and will prompt you to fill out the shipment details step-by-step. If the intended project is not to be shipped anywhere and instead be used solely for the purpose of allocating units for the project tasks, then **fill out the required address fields** with placeholder 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

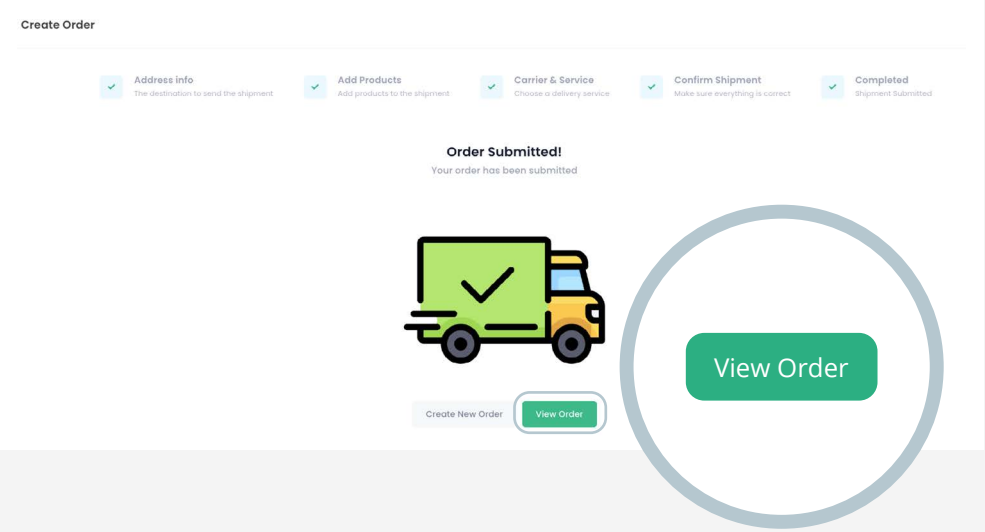


Select the Carrier/Service. If the project is not to be shipped out, then select the option “Shipfusion will determine the most efficient carrier” to allow you to continue.

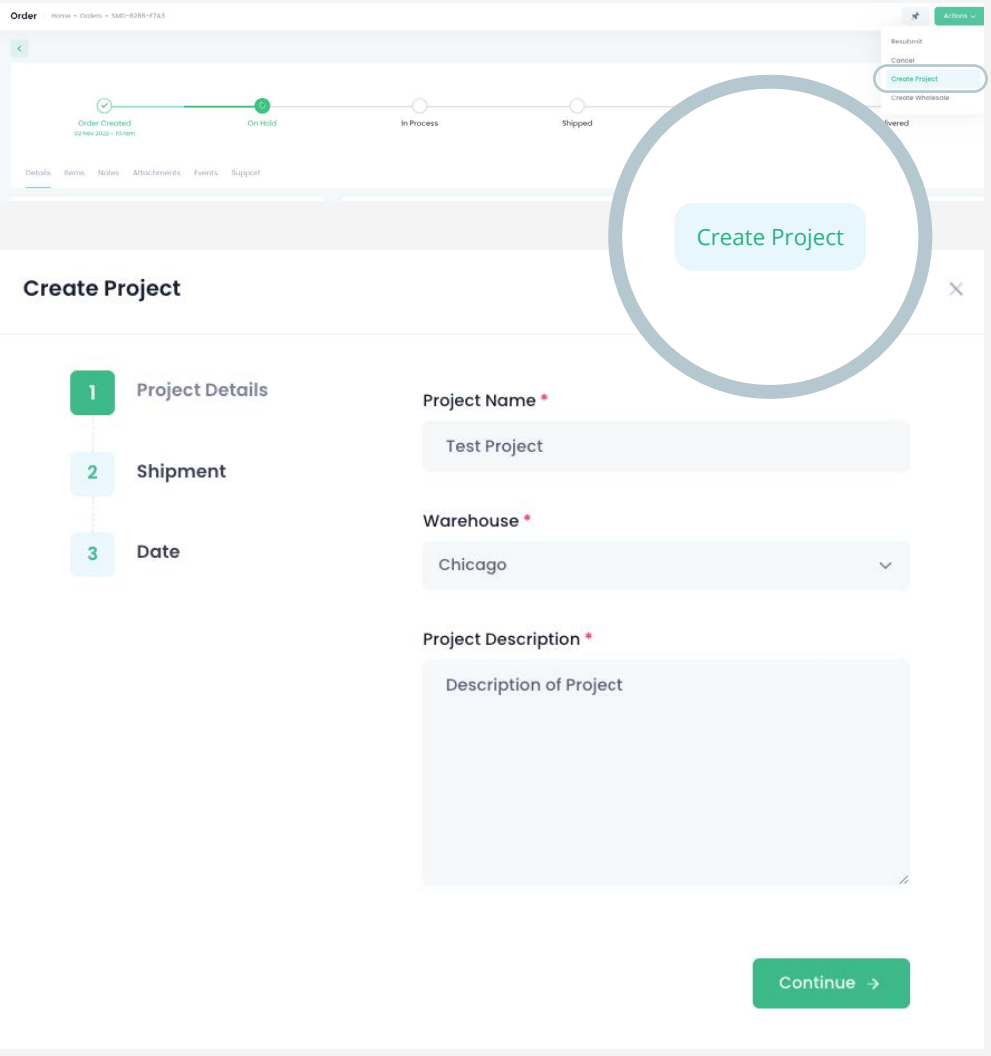


Review shipment details, then click **“Submit”** to complete creation of the shipment.

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



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



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