MERCHANT AND WAREHOUSE GUIDE

Order-to-Delivery Operations Guide

A faster fulfillment process is not a race to click Book. It is a controlled handoff: freeze the order facts, give the warehouse one useful packet, verify what was actually packed, tender the correct shipment once, follow it through delivery, and reconcile the carrier's final bill. This guide explains the complete operating loop and identifies which actions require a configured connector.

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BEST FOR: Ecommerce, warehouse, 3PL, freight, finance, and customer-care teams shipping large or hard-to-ship orders

WEB GUIDE: https://shipsafeoffers.com/guides/order-to-delivery-operations-guide

> **Current availability**
>
> The operating method can be used with manual or connected systems. Margin Safe Discounts includes source contracts for warehouse packets and fulfillment records, but carrier booking, labels, storage, tracking, final bills, customer messages, and other external actions are available only when the approved connector is configured and exercised for the named merchant. The written pilot or order form controls the supported scope.

IN THIS GUIDE

Use one owned flow from order to closure

1 **Create the shipment work item**
Link the authoritative order, selected shipping decision, expected service context, owner, priority, and due time. Hold rather than guess when the order, address, inventory, payment, cancellation, or fraud state is unresolved.

2 **Build the shipping packet**
Give the warehouse the minimum useful order, ship-from, ship-to, item, planned handling-unit, accessorial, document, and instruction record with a version or hash. Avoid uncontrolled spreadsheets and duplicate tickets.

3 **Pick, protect, pack, measure, and verify**
The warehouse confirms the right items and quantities, selects approved materials, records actual handling units, dimensions, scale weight, condition, photos, and exceptions, then signs the checklist.

4 **Rate and tender the actual shipment**
Re-rate when the verified package or service requirement differs. An authorized operator chooses service, tenders once under an idempotent reference, produces the required label or bill of lading, and records pickup details.

5 **Track exceptions through delivery**
Keep carrier identifiers, status events, expected delivery, appointment, exception owner, proof of delivery, and recipient condition feedback together. Late or duplicate events do not erase a later authoritative state.

6 **Reconcile and close**
Attach the final bill, compare quoted and actual freight/accessorials, open a dispute or claim when supported, update learning only from reviewed evidence, and close the record with an owner and retention state.

A screen is not a connection

A field or button can describe the workflow without having authority to call a carrier, warehouse, storage provider, messaging system, or claims service. The interface should say Not configured until the approved connector has been exercised end to end.

Build the shipping package once

Minimum shipping-packet sections

Section	Useful contents	Warehouse check
Identity	Merchant/store, order, channel, created time, packet version/hash, owner, priority	Correct order and latest approved version
Ship from / ship to	Tendering party, address, contact, destination, delivery flags	Address and contact are complete; sensitive detail is visible only to authorized users
Items	SKU, name, quantity and variant/product reference	Right items and quantities are physically present
Planned shipment	Expected boxes/pallets, dimensions, weight, freight mode, class where applicable, accessorials	Treat as a guide; actual packed shipment remains authoritative
Instructions	Protection, orientation, assembly, hazmat or special handling only when approved	Instructions are current, legible, and feasible

Section	Useful contents	Warehouse check
Documents	Packing slip and, when configured, labels, BOL, commercial or pickup documents	Every handling unit has the correct document and old labels are removed
Evidence	Actual units, scale weight, dimensions, photos, checklist, operator, timestamps, discrepancy	Evidence matches what is handed to the carrier
Carrier handoff	Carrier/service, booking/PRO/tracking, pickup window, dock/contact, tender result	Driver, unit count, document and reference agree

Freeze the packet for every billable or irreversible action. If the address, quantity, ship-from, package, accessorial, or service changes, create a new reviewed revision. Do not let a late response from an older packet overwrite newer truth.

Organize the floor for speed without losing proof

1. **One queue and owner**
   Use the exact app states order_received, assembling, packed, ready_for_pickup, shipped, delivered, billing_review, closed, and exception. Assigned, picking, held, verified, and booked may be merchant-local checkpoints, but they never replace the exact source state. A person owns the next action.
1. **Work by cutoff and constraint**
   Prioritize carrier cutoff, appointment, inventory completeness, equipment, special handling, and promised date—not whichever ticket is easiest to reach.
1. **Stage by shipment**
   Keep products, materials, documents, and completed units physically separated and labeled so two orders cannot merge.
1. **Measure at the end**
   Record dimensions and scale weight after protection, boxing, banding, or palletization. A catalog dimension is not a final package dimension.
1. **Use two checks for high-risk work**
   A second person verifies SKU/quantity, handling-unit count, condition, labels/BOL, accessorials, and photo evidence for the scope defined by the merchant.
1. **Hold visibly**
   Damage, missing inventory, address conflict, pack mismatch, unsafe unit, rate variance, missing document, or ambiguous booking produces a named hold. It does not disappear into a note.
1. **Close the handoff**
   Record driver/carrier, pickup time, unit count, signed document or reference, tracking/PRO, and operator. A printed label alone is not proof of pickup.

Book, label, and tender the verified shipment

1 **Confirm authority**
Only the named role can create a billable booking. Confirm the connector identity, credential scope, account, merchant, and current shipment revision.

2 **Compare appropriate services**
Use the verified origin, destination, handling units, mode, class where applicable, declared value, accessorials, timing, and merchant service rules. Do not select on rate alone.

3 **Tender exactly once**
Use one durable action record and idempotency key. A timeout or ambiguous response is reconciled against the same provider before any retry or alternate booking.

4 **Verify the result**
Read back carrier, service, booking/PRO/tracking, pickup, price where returned, and document references. A success screen without a durable receipt is not enough.

5 **Print and inspect**
Print the packing slip and any connector-generated labels. Obtain the BOL through the approved carrier/TMS workflow unless a named, tested BOL connector has been accepted; record its reference in the private operations system. Inspect legibility, barcode, unit sequence, address, service and old-label removal; record reprints and voids.

6 **Complete pickup**
Confirm dock readiness, equipment, appointment/window, carrier arrival, handling-unit count, signed handoff, and tracking activation.

If the result is ambiguous, stop

Do not create a second booking because the first call timed out. Check the durable action record and carrier under the same reference. Escalate if the external effect cannot be proved.

Track the promise, not just the scan

1 **Expected delivery**
Store the date or window as an estimate with its source and last update. Do not present an estimate as a guarantee.

1 **Milestones**
Booked, picked up, in transit, appointment needed, out for delivery, delivered, exception, refused, damaged, returned, or unknown should each have occurred and received times.

1 **Exception ownership**
Assign appointment, delay, address, damage, shortage, loss, refusal, carrier, or recipient-action exceptions with the next update time.

1 **Customer communication**
When a connector is configured, send useful event-driven updates with preferences, frequency caps, failure receipts, and suppression. Do not send a stream of raw scans.

1 **Proof of delivery**
Retain only the approved delivery reference or evidence needed for service and claims; restrict signatures/photos and apply retention/deletion rules.

1 **Final bill**
Match carrier invoice to the booked shipment, explain accessorial or weight/class changes, and keep unresolved differences provisional.

Know which path is active

Capability states for a merchant implementation	
State	**Operator meaning**
Manual supported	The documented team performs the step in the carrier/WMS system and records the result in the merchant operating record.
Connector configured	The approved integration has identity, credentials, permissions, idempotency, retry, reconciliation, monitoring, and a successful end-to-end receipt.
Controlled pilot	The function is limited to the signed merchant, action, users, environment, exposure, and support window.
Private beta	Distribution and support are limited and explicitly accepted; this is not general availability.
Not configured	The product may display or store the related information but cannot perform the external action.
Unavailable / held	A prerequisite, authority, connector, or reconciliation is missing; the operator must not improvise around the block.

Run the daily fulfillment huddle

1 **New and due**
Review new orders, carrier cutoffs, promised/expected dates, appointments, priorities, and assignments.

2 **Held and aging**
Name owner, issue, next action, deadline, customer impact, and escalation for every hold.

3 **Packing and tender**
Review inventory, materials, equipment, verified units, documents, booking ambiguity, pickups, and tracking activation.

4 **In transit and delivery**
Review exceptions, appointments, overdue scans, expected-delivery changes, condition feedback, and damage/claim urgency.

5 **Finance and evidence**
Review final bills, disputes, claims, missing photos/POD, quote-to-bill variance, and records safe to close.

6 **Improve**
Select one repeated source of touch time or error, change one controlled step, and measure the result without weakening verification.

Stop and escalate when the external effect is unclear

Pause the affected shipment or action when a packet revision, tenant/account, address, handling unit, label, BOL, booking, tracking reference, customer message, evidence object, or final bill is ambiguous. Preserve the record and contact the named merchant support owner. Do not send credentials, customer labels, private rates, or unrestricted evidence through the public form or ordinary email.

Continue with the operating and trust guides:

- Delivery, damage and claims guide
https://shipsafeoffers.com/guides/delivery-damage-and-claims-guide

- Margin Safe Packer workflow
https://shipsafeoffers.com/packer

- Support Policy
https://shipsafeoffers.com/policies/support

- Security and Trust Statement
https://shipsafeoffers.com/policies/security

RELATED RESOURCES

Read the delivery, damage and claims guide
Prepare delivery follow-up, photo evidence, claim records, fair review invitations, and re-engagement.
https://shipsafeoffers.com/guides/delivery-damage-and-claims-guide

See the Margin Safe Packer workflow
Review the warehouse-floor evidence product and current availability.
https://shipsafeoffers.com/packer

Use the Margin Safe Discounts user guide
Understand merchant controls, evidence, eligibility, and safe no-offer behavior.
https://shipsafeoffers.com/guides/margin-safe-discounts-user-guide

SUPPORT: help@shipsafeoffers.com

Do not send passwords, API keys, carrier credentials, negotiated rates, customer labels, or sensitive exports through ordinary email.