



Standard Operating Procedure (SOP): Managing Orders and Purchasing Shipping Labels with Shippo and WooCommerce

Purpose:

To efficiently check orders in WooCommerce, synchronize them with Shippo, and purchase shipping labels.

Scope:

This SOP is for WooCommerce store administrators or managers who use Shippo for shipping management.

Responsibilities:

- WooCommerce Store Administrator/Manager
 - Shipping Manager

Procedure:

- Log in to WooCommerce:
 - Access your WordPress dashboard.
 - Navigate to WooCommerce and log in using your credentials.
 - Review Orders:
 - Go to the 'Orders' section in WooCommerce.
 - Check for new orders that need processing.
 - Synchronize Orders with Shippo:
 - Ensure that your Shippo account is connected to your WooCommerce store. This should be set up in the WooCommerce settings under the 'Integration' tab.
 - New orders from WooCommerce should automatically appear in your Shippo dashboard. If not, you may need to manually sync them or check your integration settings.
 - Log in to Shippo:
 - In a new browser tab, log into your Shippo account.
 - Find the Order in Shippo:

- Locate the synchronized order in Shippo. You can search by the customer's name or the order number.
 - Verify Order Details:
- Ensure that the order details (such as item weight, dimensions, and shipping address) are correct. Update if necessary.
 - Select Shipping Service:
- Choose the appropriate shipping service based on the customer's preference, cost, and delivery time frame.
 - Purchase Shipping Label:
- Once the service is selected, proceed to purchase the shipping label. The cost will be displayed.
 - Confirm the purchase, and the label will be generated.
 - Printing the Shipping Label:
 - Download the shipping label from Shippo.
 - Print the label using a standard printer or a label printer.
 - Update Order Status in WooCommerce:
 - Go back to the WooCommerce dashboard.
 - Update the order status to 'Shipped' or equivalent.
 - Input the tracking number (provided by Shippo) in the order details for customer reference.
 - Notify the Customer:
- Send a shipping confirmation email to the customer with the tracking number and expected delivery date.
 - Record Keeping:
- Maintain a record of the shipped order and the shipping details for future reference or in case of customer inquiries.

Documentation:

- Keep a digital log of all shipping labels purchased and their associated orders for accounting and customer service purposes.

Notes:

- Ensure that your WooCommerce and Shippo accounts are always synchronized for accurate data.
- Regularly check for any updates or changes in shipping rates and policies from Shippo.

Review and Update:

- This SOP should be reviewed every six months to ensure it aligns with current Shippo and WooCommerce features and policies.