

## Standard operating procedure

### Client Onboarding Process

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#### Introduction:

The purpose of this Standard Operating Procedure (SOP) is to describe the complete and correct process for onboarding new clients into the Fulfill sales processes. It serves as a step-by-step guide for Account Managers to follow, ensuring consistency, clarity, and operational efficiency across all client accounts.

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#### Purpose:

To ensure a standardized and efficient onboarding process for new clients.

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#### Scope:

Applicable to all Account Managers onboarding new Shopify clients through Fulfill.

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#### Responsibilities:

List of roles and responsibilities:

Role	Responsibilities
Account Manager	- Serve as the main point of contact between the client and internal teams
	- Oversee and coordinate the onboarding process from start to finish
	- Create client group chats and facilitate introductions
	- Update the Order Information Sheet and Order Issues Sheet
	- Communicate time zone working hours and weekly call schedules
	- Ensure smooth internal communication between departments
Fulfill Admins	- Connect the client's Shopify store to Dianxiaomi
	- Assist with any technical or backend integration
	- Coordinate product purchasing and tracking with the China warehouse

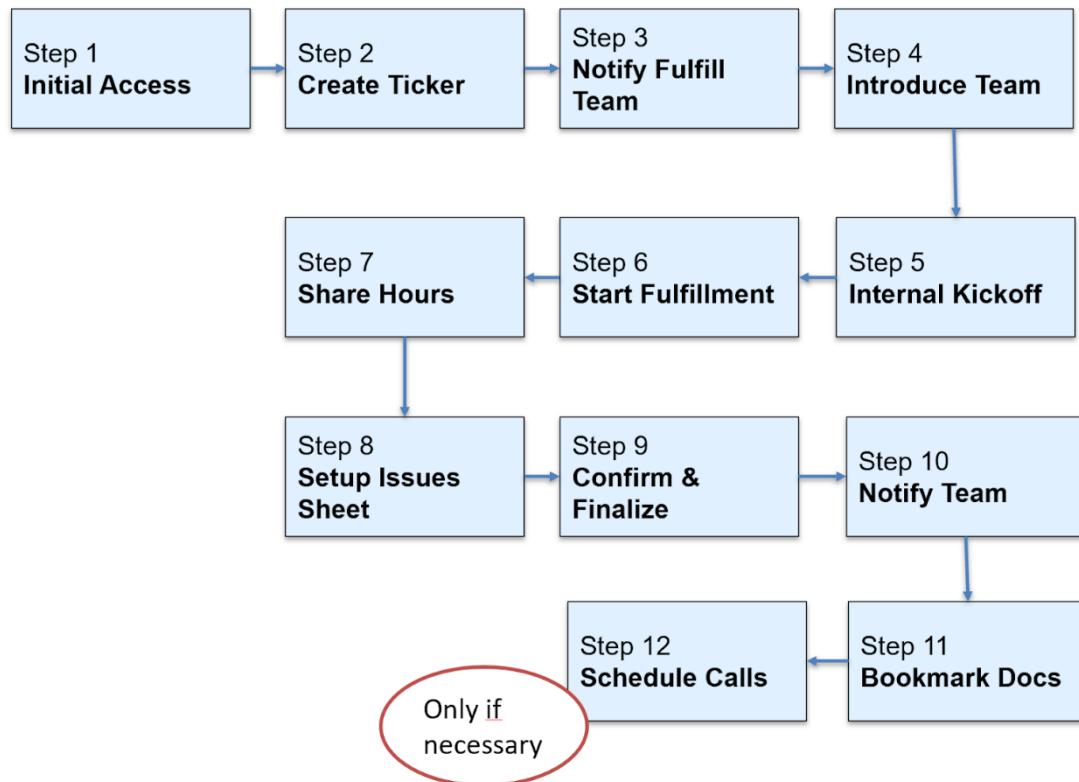


	<ul style="list-style-type: none"> <li>- Support the AM with fulfillment-related updates</li> </ul>
Client	<ul style="list-style-type: none"> <li>- Provide collaborator or staff access to their Shopify store</li> </ul>
	<ul style="list-style-type: none"> <li>- Confirm order start numbers and product list</li> </ul>
	<ul style="list-style-type: none"> <li>- Review and communicate through the provided sheets and WhatsApp group</li> </ul>
	<ul style="list-style-type: none"> <li>- Align with the Account Manager on expectations, timelines, and weekly check-ins</li> </ul>

Table 1. Roles and responsibilities.

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## Procedure:



Graph 1. Process flowchart

### Step 1. Initial Access Setup

**1.1.** After the client accepts the quote, request Staff or Collaborator Access to their Shopify Store using the company email:

[sourcemyproduct@gmail.com](mailto:sourcemyproduct@gmail.com)

Suggested message to request access (to send to the client):

*"Please add sourcemyproduct@gmail.com as a staff or collaborator to your Shopify store so our team can begin the technical setup."*

**1.2.** Notify one of the following team members (Jack, Lili, or John) to connect Dianxiaomi to the client's Shopify store.

 If the previous supplier is connected, they may need to log out first to enable access.

**Note (internal only):** Full access is preferred. If the client is hesitant, request access to Orders and Apps, and ask them to install Dianxiaomi so our team can log in.

### **Step 2. Create Client Store Ticker**

**2.1.** Generate a short 3–5 character ticker for internal use.

Example: **brilliance.com → BRIL**

### **Step 3. Notify Fulfill Team**

**3.1.** Send a message in the internal WeChat team group, tagging two office administrators.  
Include:

A. Ticker Assignment

Example: "New store onboarded: BRIL = brilliance.com"

B. Add all quote/order data to the [Order Information Sheet](#)

**3.2.** Create a new WhatsApp group with the client and the internal team, please consider:

Group name format: "STORE NAME | Fulfill"

Upload a suitable profile photo. Example:





DERM | Fulfill

Filipo, Fratello ⚡ ⚡ , J2, Lili - Fulfill, ~Alessia, ~Rafael S., You



#### Step 4. Introduce Team to Client

Within the new WhatsApp group you've created:

**4.1.** Introduce all Fulfill team members in the WhatsApp group.

**4.2.** Tag everyone using full names (not just surnames) to ensure clarity.

Example:

@Alex meet Lili @Lili - Fulfill , & Alleo @J2 11:12 AM ✓



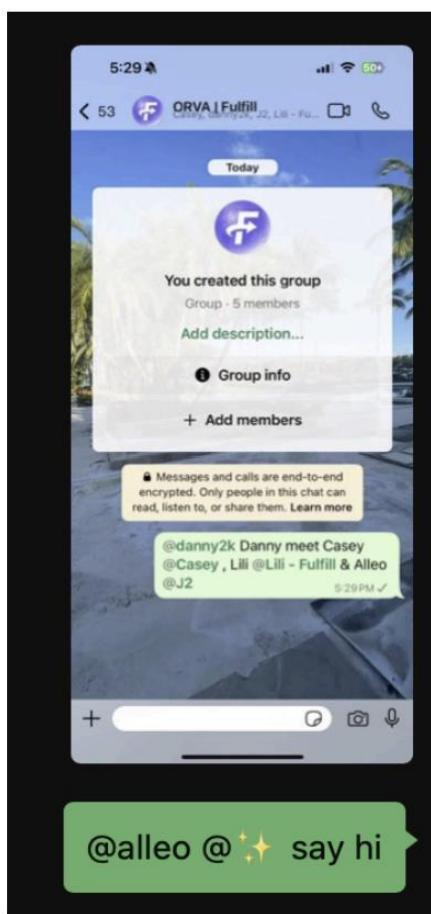
## Step 5. Internal Kickoff

### 5.1. In the WeChat group:

Tag the two assigned team members.  
Greet them and inform them of the new client.

### 5.2. Also, send a screenshot of the WhatsApp group in the WeChat group to make sure everyone is aligned.

Example:



## Step 6. Start Fulfillment

### 6.1. Request the first Shopify Order Number from the client.

### 6.2. Instruct the team to:

Begin product purchasing.

Communicate the estimated arrival time of goods at the warehouse to the client.

### Step 7. Share Operating Hours

**7.1.** Use a timezone converter (or AI tools) to find the client's local time relative to China.

**7.2.** Share China office hours with the client:

#### China Team Operating Hours

**China Standard Time (CST)**

**Monday – Saturday: 10:00 AM – 7:00 PM**

**Closed on Sundays**

**Note:** Some admins may continue working remotely after regular hours.

 You may wait until Day 2 to send this.

### Step 8. Set Up the Order Issues Sheet

**8.1.** Share the [Order Issues Sheet](#) (template – do not modify directly, create a copy).

 Adjust sheet sharing settings to “Anyone with the link can edit.”

 Video with Instructions on how to edit the Order Issues Sheet: [Video](#)

**8.2.** Send this message in the WhatsApp group:

*I've shared an 'Order Issues' Sheet to streamline order-related communication.*

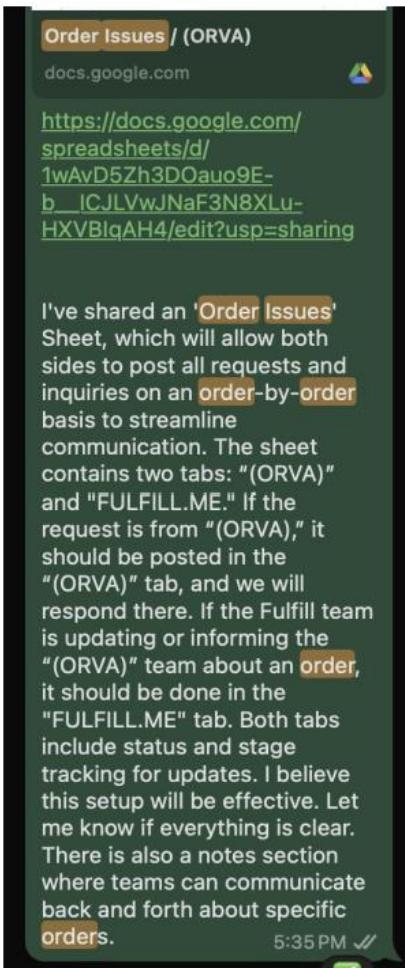
The sheet contains two tabs:

- “STORE NAME”: For client requests
  
- “FULFILL.ME”: For updates from our team  
Each entry includes order status and stage tracking. There's also a Notes section for ongoing communication.

### Step 9. Confirm and Finalize Setup

**9.1.** Send the final shared sheet link + message to the client. Example:

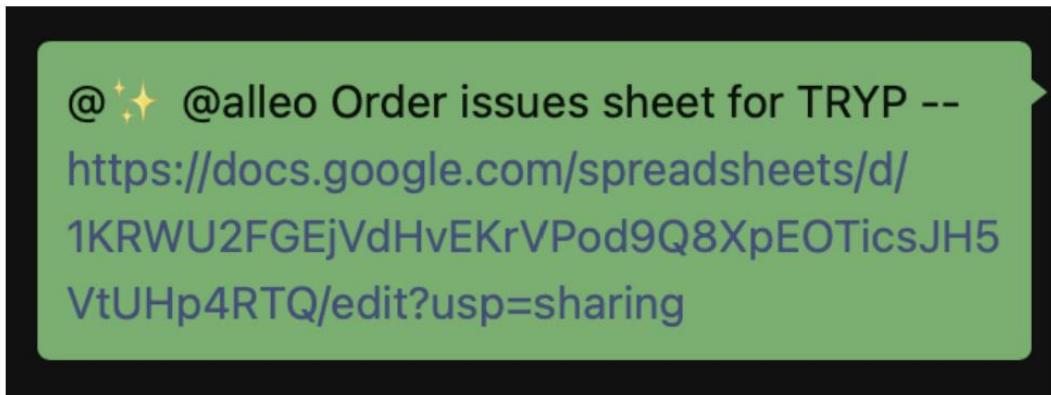




## 9.2. Confirm receipt and understanding.

### Step 10. Inform Internal Team

Use the WeChat group to notify the Fulfill team of the new Order Issues Sheet and its purpose.  
Example:



### Step 11. Bookmark Key Documents

Bookmark the client's Order Information Sheet and Order Issues Sheet on your computer for easy access.

### **Step 12. Schedule Weekly Calls (if needed)**

12.1 Depending on client size and complexity:

Ask for their time zone

Set a fixed weekly call time and day to maintain alignment.

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**References and additional information:**