

Tracing wholesale orders across separate systems

Order-workflow changes, transaction reconstruction, and practical software evaluation.

GRACE YARU Business Systems & Operations

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BUSINESS SYSTEMS & OPERATIONS MANAGER | 2024-2026

Canadian and U.S. wholesale orders moved through separate sales, inventory, shipping and accounting systems. I traced partial shipments across two U.S. Fishbowl environments, simplified Canadian internal order entry and compared approximately ten EDI providers.

THREE PRACTICAL OUTCOMES

01

SOP / Independent order entry

I wrote role-specific instructions, used a live-order walkthrough and followed up as Sales, Warehouse and Accounting used the process.

Result: a new Sales employee entered orders independently.

02

Canada / One internal order record

I clarified Fishbowl's role for internal orders, retained BigCommerce history and explained the new workflow to Sales.

Result: one place to maintain internal orders.

03

U.S. / Checked shipping and billing

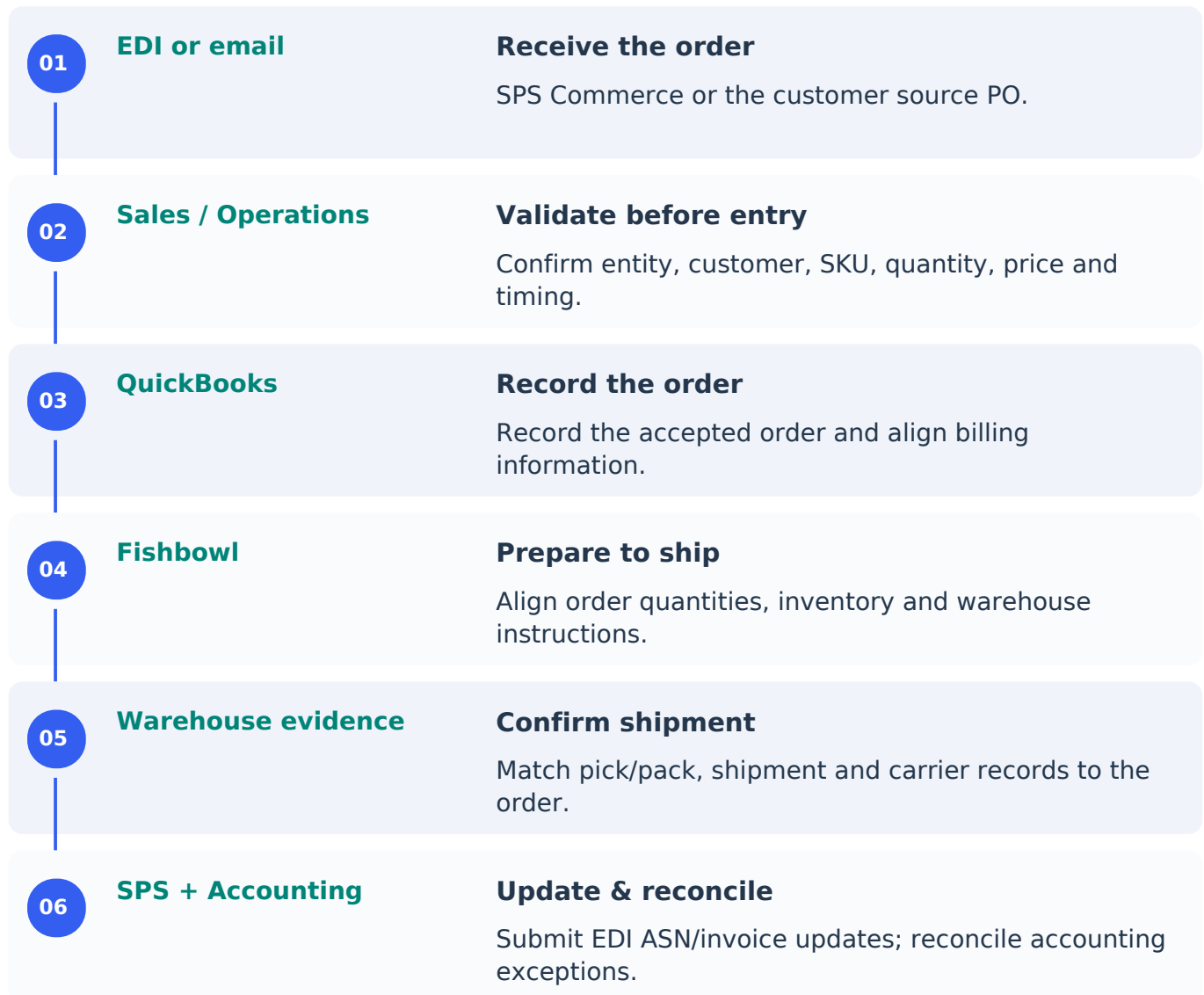
I rebuilt selected U.S. order lines using original purchase orders, both Fishbowl environments, shipments and invoices.

Result: checked shipped, billed and outstanding quantities.

Based on my own work. No confidential data is shown. Customer names, order numbers and quantities are anonymized or illustrative.

Make every handoff explicit

How I checked source records and coordinated the people at each handoff.



Two U.S. entities used separate Fishbowl environments: one for container receipts, one for customer sales. I reconciled selected orders across both, including shipment and serial records. ASN = advance shipping notice.

SEPARATE CANADIAN IMPROVEMENT

BigCommerce

Website, online sales and historical order information.

Fishbowl

One internal record for orders, inventory, fulfillment and reporting.

[See how I checked an order in the interactive example online](#)

What changed for the team

Practical outcomes from process changes, investigations and user guidance.

01

Canada / Process change

Internal orders were maintained separately in BigCommerce and Fishbowl. I mapped the handoff, checked options with platform support and clarified each system's role.

Result: Sales and Warehouse used Fishbowl as one place to maintain internal orders.

02

U.S. / Reconciliation

I reconstructed selected orders using original purchase orders, both Fishbowl environments, shipment and serial evidence, invoices and relevant emails.

Result: teams could identify what remained to ship. Accounting had a checked balance to review against billing.

03

EDI / Vendor evaluation

I compared approximately ten providers against five criteria: Data flow; Manual work; Dual-environment support; Implementation, support & cost; Failure handling.

Result: a written comparison and shortlist for management. No new integration was deployed.

USER ADOPTION / A PROCESS PEOPLE COULD REPEAT

A new Sales employee used my SOP to enter orders independently. Repeat questions decreased.

I wrote role-specific instructions, walked Sales, Warehouse and Accounting through a real order, and followed up on live work.

Turn findings into a controlled pilot

An eight-week pilot and sample acceptance tests for a future integration.

PROPOSED REQUIREMENTS AND ACCEPTANCE CRITERIA

R01	Clear system ownership	Internal orders use Fishbowl; BigCommerce web and historical records remain accessible.
R02	Reliable open quantities	100 ordered, 35 + 25 shipped: 40 open. A duplicate shipment record does not change the balance.
R03	Validation before release	A wrong entity or price is flagged and held for authorized confirmation.
R04	Shipment-to-invoice traceability	A partial-shipment notice uses actual quantity; the invoice links to the PO, shipment and agreed terms.
R05	Owned exception resolution	An unconfirmed shipment creates an owned exception; closure requires supporting evidence.

PILOT ROADMAP / OWNERS, OUTPUTS AND DECISION GATES

WK 1-2	Discover	Sales/Ops + Accounting Baseline, field map and scope Gate: Sponsor approves scope.
WK 3-4	Design	Sales/Ops + vendor Mapping, options and test cases Gate: Feasibility and funding approved.
WK 5-6	Validate	Warehouse + Accounting Sample-order UAT, exception log, SOPs Gate: Critical cases pass; users sign off.
WK 7-8	Pilot	Sales/Ops + sponsor Limited pilot and measurement review Gate: Scale, revise or stop; fallback ready.

Measure: entry time per order, mismatch rate, exception age and shipment-to-invoice lag against a pre-pilot baseline. Keep approval before quantity or billing corrections and an agreed manual fallback.