CartonCloud

The Smooth Operator's Playbook

How to Nail B2B and E-commerce Fulfillment Without Losing Your Mind

The Smooth Operator's Playbook

Chapter 1
Unlocking Your Smooth Operator Mindset

E-commerce is quickly becoming the fastest way for people and businesses to buy, sell, and ship products with just a few clicks. From global brands to small startups, companies everywhere are leaning into e-commerce to reach new customers and grow faster than ever before.

Whether you're managing your own inventory (1PL) or providing fulfillment for others (3PL), this shift is packed with opportunity. E-commerce means more frequent orders, more variety, and more demand for flexible, reliable fulfillment partners. And the best part? The market keeps growing, with new doors opening every day for warehouses ready to say yes.

In this section, we'll dive into why e-commerce is booming, what real success looks like, and how you can easily add it as a service in your warehouse — so you can unlock new opportunities and grow your business!

Launching into E-commerce: You're Closer Than You Think

One of the best parts about e-commerce for 3PLs is just how easy it is to introduce into your day-to-day operations! That's right—with only a few simple tweaks to your existing warehouse space and leveraging the tech and team you already have, you can step into this fast-growing market and generate fast ROI.

EXPERT CORNER

**Olivia Trankina,
North American Operations
Manager**

"We've seen so many 3PLs easily transform unused space in their warehouse into a mini e-commerce hub.

All you need is some totes, a trolley, and you're set. It doesn't have to be complicated or expensive—start with a small, dedicated area and let the orders guide your growth. Before long, that corner of your warehouse can become one of your most profitable spaces!"

That's the beauty of e-commerce—it's a natural extension of what you're already doing in your B2B operations! Success means having a fulfillment operation that's fast, flexible, and ready to deliver what customers want—whether that's same-day shipping, smooth onboarding for new brands, or real-time order updates. By building on your existing strengths, you can roll out e-commerce services in days, see ROI from your very first client, and position your warehouse as the go-to fulfillment partner for growing online brands.

Here's how your existing WMS setup already gives you the tools you need to launch into e-commerce:

1. Simplicity – Onboarding new clients? Easy. Using CartonCloud's easy **integrations**, you can get your clients up and running in minutes, not months. Once their online storefront is linked to your WMS, orders flow in instantly—allowing you to start fulfilling orders from day one of onboarding.

2. Automation – E-commerce might bring higher order volumes and smaller picks—but with CartonCloud, you're ready to smash it all from the beginning. Smart features like Replenishment keep fast-moving stock in easy-to-reach pick locations—while **automated invoicing** quietly handles the rest—with **rate cards** applied and invoices generated instantly without having to lift a finger.

3. Seamless Operations – Manage your B2B and e-commerce fulfillment side-by-side without switching systems! CartonCloud's real-time inventory tracking, automated charging, and integrated invoicing means everything flows through one connected platform — giving you complete oversight and a single source of truth for your entire operation.

4. Full Visibility - Deliver exceptional customer service with ease by giving your customers complete, real-time insight into their orders. CartonCloud's **customer portal** ensures full transparency, allowing them to track their orders and status live — directly from their own dashboard.

Now, let's take a closer look at the massive opportunity waiting for you in this market. From the soaring value of online sales to the latest industry trends, understanding what's driving the e-commerce boom will help you spot where your business can grow next.
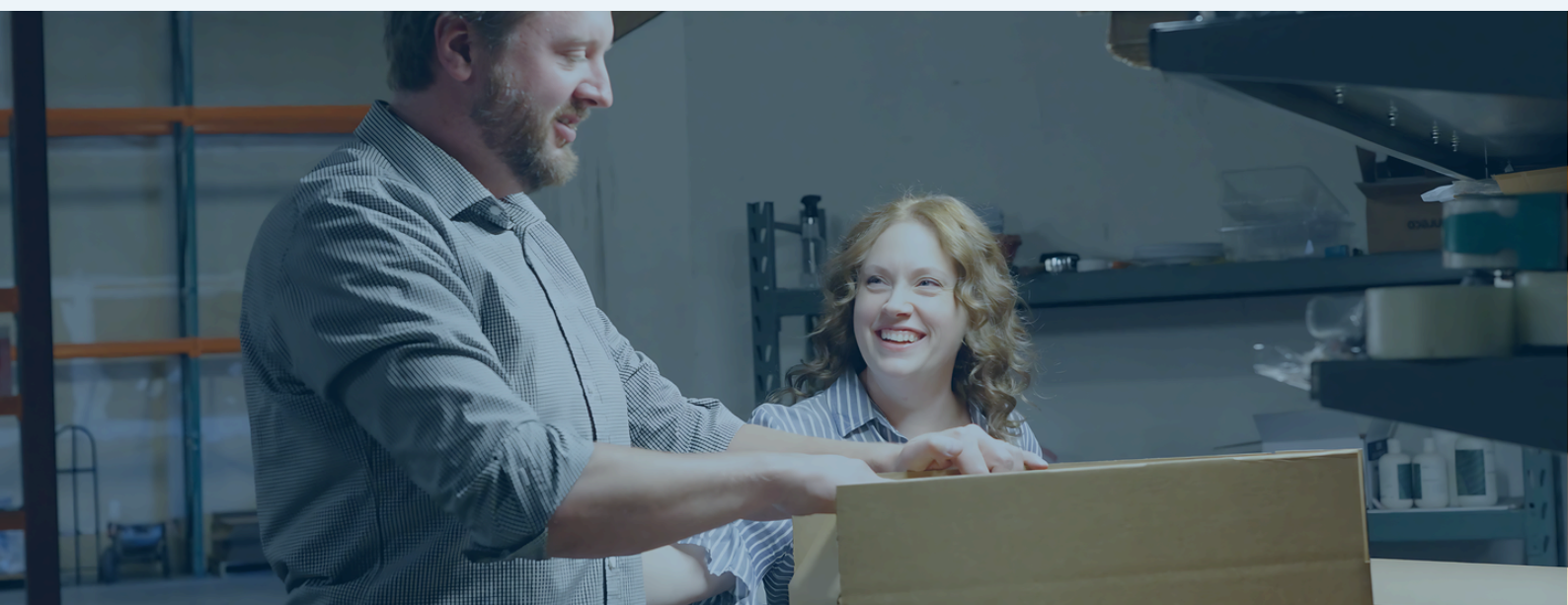
Discovering the E-commerce Opportunity: Why Now?

So you might be wondering—why jump into e-commerce now instead of waiting? The demand is already here, and it's only getting stronger! Brands of all sizes are actively searching for fulfillment partners who can do it all: handle viral product drops, keep up with seasonal spikes, assemble subscription boxes, and meet the rising expectation for next-day delivery. By getting established today, you can start building those relationships early, expand your client base, and strengthen your reputation—putting you ahead of the competition in this fast-growing market.

Key Industry Stats and Trends to Know

The U.S. logistics market is on an incredible growth path, expected to reach $1,998 billion in 2025 and nearly double to $3,814 billion by 2033. This surge is driven in large part by e-commerce, with the sector already posting an impressive 8% increase from 2024 to 2025. Year after year, this upward momentum is expected to continue, making logistics one of the most dynamic spaces to watch.

For 3PLs, the door is wide open. Today's e-commerce brands—whether they're boutique startups or household names—are searching for fulfillment partners who can nail accuracy, speed, and a standout brand experience from checkout to doorstep. The trend goes beyond higher volumes; it's about flexibility, adaptability, and top-notch service.

And while e-commerce spans almost every product imaginable, certain sectors are especially primed for 3PL growth. Food & beverage and health & medical are just a few examples where speed, compliance, and tailored workflows can make all the difference. (We'll dive deeper into these niches and how to win in them in Chapter 5.)

Warehouses that can pivot quickly, automate smartly, and offer e-commerce alongside their B2B services aren't just keeping pace—they're setting themselves up to lead the market.

The E-commerce Order Lifecycle: From Storefront to Doorstep

Before diving into the details, it helps to zoom out and see the full journey an e-commerce order takes—from that first purchase to the moment the package lands on a customer's doorstep. When your workflows are dialed in, every step of this process runs like clockwork, creating a seamless experience that keeps clients happy and customers coming back for more.

CartonCloud for e-commerce!

OPTIMIZE PICK & PACK

Process thousands of orders per day with accuracy and speed using Wave Pick, Pick to Tote, Replenishment, and other features on the Mobile App.

SHIP & TRACK

Print labels and share order tracking details. Integrate with a carrier and shipping platforms, or automate consignment creation with CartonCloud's TMS.

+ 100s of other carriers & shiping platforms

IMPORT ORDERS

Automatic order creation from online stores.
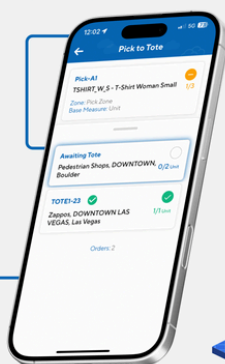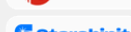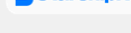
+ 100s of other applications

CartonCloud enables seamless integration with hundreds of other systems, from shopping carts such as Shopify and WooCommerce, to ERPs such as Netsuite and SAP.

AUTOMATE INVOICING

Automate complex rate card calculations within CartonCloud, and connect with your accounting software to automate invoice creation.

Here's how a typical e-commerce order flows through your warehouse:

1. Order Placed Online - The customer checks out through an online storefront (like Shopify, WooCommerce, or Amazon). Through system integrations, new orders are captured instantly in your WMS, ready for your team to pick and pack.

2. Picking & Packing - Your team picks the items needed for fulfillment, using wave-picking workflows like **Pick to Tote** and **Bulk Picking**. **Replenishment** keeps stock in easy-to-reach locations, so every order goes out faster and with fewer errors.

3. Shipping - Shipping labels are created automatically, and orders are assigned to the shipping carrier. Real-time tracking numbers are pulled directly from the carrier and are then shared with both your clients and their customers, so everyone knows exactly where the parcel is—every step of the way.

4. Automated Invoicing - Invoices are created automatically and sent straight through your accounting software, making billing quick and effortless.

Your Guide to E-commerce Success: What's Inside

Now that you've seen the full journey, this e-book will walk you through each stage, giving you the practical tools, expert insights, and checklists you need for smooth operations.

Here's what you can expect in the chapters ahead:

- **Chapter 2: The E-commerce Difference—What Sets It Apart:** Unpack what really sets e-commerce fulfillment apart, and see how close you already are to making the leap.

- **Chapter 3: Integrating Smoothly—Connecting Online Stores:** Step-by-step guides to onboarding customers, connecting storefronts, and setting up your systems for success.

- **Chapter 4: Workflow Wins—How to Pick & Pack Like a Pro:** Discover proven workflows, real warehouse tips, and the best workflow fit for every type of order.

- **Chapter 5: Tailoring Your Workflows for Your Industry Niche:** See how to tailor your workflows for food & beverage, health & medical, and more.

- **Chapter 6: Delivering Delight—Shipping & Tracking to the Customer's Doorstep:** Learn how to automate shipping, keep customers updated, and meet high delivery expectations.

- **Chapter 7: Effortless Invoicing:** Find out how to automate billing and keep your cash flow smooth—even with high volumes.

- **Chapter 8: It's All Happening Smoothly:** Get inspired by real e-commerce success stories, explore learning resources, and pick up best-practice checklists for staying on top of your game.

- **Chapter 9: Frequently Asked Questions (FAQ):** Your top smooth operator questions—answered by our experts!

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Chapter 2

The E-commerce Difference— What Sets It Apart

E-commerce fulfillment is simply a different way of using the skills, space, and systems you already have!

Instead of shipping large, bulk orders to retailers or distribution centers like in B2B, you'll be dealing with smaller, fast-turning orders—often a mix of different products—directly to customers' doorsteps.

The core principles stay the same: receive, store, pick, pack, and ship. The difference lies in the speed, variety, and volume—areas where your existing expertise already shines.
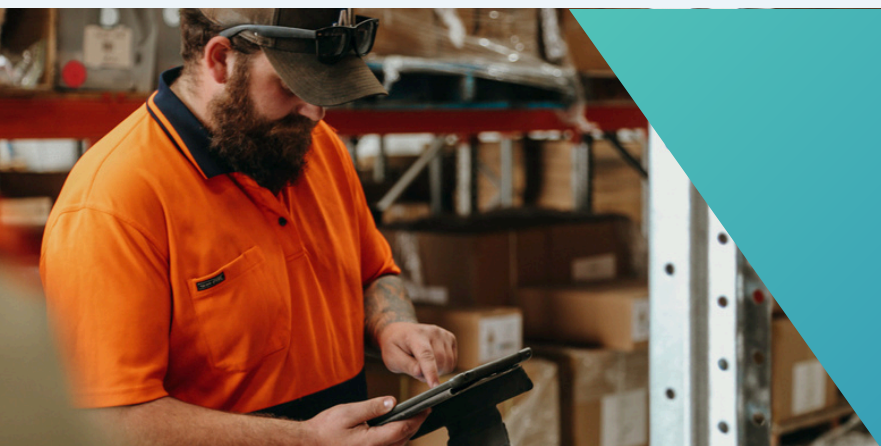
Traditional 3PL vs. E-commerce: What's Really Different?

High-Volume, High-Variety Orders:
E-commerce means handling hundreds or thousands of small, varied orders daily—often a mix of SKUs—rather than fulfilling the same bulk shipments.

Direct-to-Consumer Shipping:
Orders go straight to customers' homes via couriers like USPS, FedEx, AusPost, or Canada Post, instead of bulk freight to retail or distribution centers.

Smaller Margins, Higher Efficiency:
For e-commerce, there are lower margins per order, so the key to making it profitable is all about speed and precision, and fulfilling large volumes of orders quickly and accurately.

Customer Expectations:
Shoppers expect same-day or next-day shipping, plus real-time tracking from checkout to delivery.

At first glance, e-commerce might seem quite different—smaller orders, direct-to-customer shipping, and faster turnaround times—but the truth is, you already have a strong foundation to handle it with ease. Your existing B2B toolkit—technology, warehouse setup, and invoicing processes—can be adapted with just a few simple tweaks to meet these demands.

Here's a quick snapshot of how your current strengths can translate seamlessly into e-commerce success (with each area explored in more detail in the chapters ahead!).

Leveraging Your Tech for E-commerce
Your WMS can integrate to client's online storefronts so you can onboard new clients and start fulfilling e-commerce orders right away, while the same barcode scanners you use for bulk pick and pack can power fast, accurate e-commerce picking with real-time updates.

Adapting Your Warehouse Space for Speed and Flexibility
Simple changes like adding dedicated pick faces, automating replenishment, and using tote trolleys (a picking cart designed to hold multiple totes) make it easy to handle more orders quickly without a full warehouse redesign.

Automated Invoicing All In One Place
Whether it's a pallet or a parcel, automated rate card calculations let you generate and send invoices for both bulk and e-commerce operations from one WMS platform.

Common E-commerce Order Scenarios and How They Impact Operations

One of the biggest shifts you'll notice in e-commerce is the variety of orders your 3PL will be handling. Let's take a look at some of the most common order scenarios you're likely to see in e-commerce fulfillment.

1. Large Volumes of Identical Single-Item Orders
This type of scenario is common after a big promotional sale, product launch, or when an item goes viral—and can generate hundreds or even thousands of orders all for the exact same product.

2. High Volumes of Single-Item Orders for Different Products
This scenario involves processing many single-item orders, each with a different SKU, style, or color. For example, it could be multiple orders for water bottles, each in a different size or shade.

3. Multi-Item or Bundled Orders
This scenario involves orders containing multiple SKUs or curated sets—like subscription boxes, fitness kits, or custom gift packs. These require careful picking and assembly to keep each order organized and ready for packing and shipping.

Quick Order Scenario Comparison

Order Scenario	What It Looks Like	Key Things to Watch Out For
Large Volumes of Identical Single-Item Orders	Hundreds or thousands of orders for the same product—often after a promo, viral trend, or product launch.	Staying accurate when working at speed.
High Volumes of Single-Item, Many-SKU Orders	Lots of single-item orders, but each is a different SKU, color, or size—like water bottles in every shade.	Preventing picking errors and keeping SKUs well-organized.
Multi-Item or Bundled Orders	Orders with multiple SKUs or curated bundles, like gift sets or subscription boxes.	Avoiding mix-ups and making sure every bundle has the right items.

↘ CHECKLIST

Order Integrations: Are your online storefronts fully integrated with your WMS, so new orders can appear instantly?

Barcode Scanning: Does your team have scanning devices to enable fast, accurate picking and real-time system updates?

Pick Face & Replenishment Setup: Have you set up dedicated pick faces for fast moving stock, and is replenishment automated to keep bins stocked at all times?

Tote Trolleys: Do you have totes and trolleys available to streamline multi-order picking?

TIP!
We recommend having a trolley equipped with **at least 30 totes** so you can take on high-order volumes all in one trip!

*For more best practice tips, check out our **quick guide** on how to prep your warehouse using a tote trolley and CartonCloud's Pick to Tote feature.*

Chapter 3

Integrating Smoothly—Connecting Online Stores & Shipping Carriers

E-commerce success comes down to giving customers the smooth, transparent experience they expect—live stock updates, instant order confirmations, and real-time shipping details they can trust.

They want to know that what's online is actually in stock and on its way fast. The easiest way to deliver this? Connect your warehouse directly to their online storefronts, so every step from order to delivery is accurate, instant, and effortless.

Let's explore how you can integrate with these storefronts using CartonCloud.

Top Online Platforms & Why Integration Matters

These days, brands aren't sticking to just one store—they're popping up across multiple platforms to reach as many customers as possible. The big players—like **Shopify**, **WooCommerce**, and Amazon—are some of the top choices for brands to sell their products. That's why it's essential to integrate your WMS with these platforms, that way you can have new orders drop straight into your system the moment they're placed—and offer same-day fulfillment, live order tracking, and the speed and accuracy today's customers expect.

E-commerce Client Onboarding: The Essentials

Bringing on your new e-commerce client isn't just about getting their products on your shelves—it's about making sure their entire operation flows smoothly from the moment an order is placed online. That means taking a few key steps to set them (and you) up for success.

Setting Up Storefront Connections

First things first, you want to connect your client's online storefront directly to your CartonCloud WMS! Not only does this ensure orders are ready to be picked in real-time, but your warehouse stock levels are synced with the online platform, so customers can always see what's available, and you can prevent any stock-out scenarios.

Inventory Onboarding & SKU Accuracy

When you take on your client's products, it's essential that the SKUs in your WMS match exactly with the product data on their storefront. This accuracy keeps orders flowing without errors, ensures your picking and packing team can move fast without second-guessing product details. It also helps maintain clean reporting, smooth inventory counts, and accurate backorder management—so every part of the process, from stock control to customer updates, runs like clockwork.

Backorder Management

Out-of-stock moments are almost inevitable in e-commerce—especially after a big sale or viral product launch. That's where CartonCloud's **Backorder Management** comes in, giving you a simple, efficient way to handle these orders. By automatically flagging them with the *'Awaiting Stock'* status, you can track and manage each one through to fulfilment, keeping customers happy and operations running smoothly.

Using Backorder Management, you can:

- See all out-of-stock orders in Awaiting Stock status, giving your team instant visibility on what's pending.

- Choose to ship available items right away or hold the whole order until everything's ready.

- Split shipments so customers receive what's ready now, instead of waiting for one item to restock.

Plug-and-Play: Integrating Storefronts

Now let's dig a little deeper with setting up your integrations! Using CartonCloud's self-managed Shopify integration, connecting your WMS to Shopify only takes a few clicks *(and you can do it all yourself!)*. Once set up, your system can instantly generate sale orders, update stock, and push tracking info back to the online store, keeping everyone up-to-date.

Step-by-Step: Setting Up Your Shopify Integration

Connecting Shopify has never been easier! In just 5 simple steps, you can link your client's Shopify store using **CartonCloud's self-managed integration**. Plus, your customers can set up their own Shopify accounts if they prefer—making the authentication process easy, and secure!

1. Set It Up – Name your integration (include your customer's name so it's easy to spot later) and start the configuration.

2. Connect to Shopify – Link CartonCloud to your customer's Shopify account with their store domain and login. A green status dot means you're good to go!

3. Configure Orders – Map Shopify locations to your warehouses, match custom fields, and decide if only orders that are already paid should flow into CartonCloud.

4. Enable Fulfillment & Tracking – Choose to send fulfillment updates back to Shopify, notify customers automatically, and add carrier/tracking details for full transparency.

5. Test & Go Live – Run a test order to make sure everything flows smoothly—then you're ready to start taking on your client's orders! Easy.

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Chapter 4

Workflow Wins—How to Pick & Pack Like a Pro

When it comes to e-commerce, efficiency is everything. The faster (and more accurately) your team can work, the more orders you can smash through—without sending your overheads through the roof.

Well-tuned workflows mean you can pick, pack, and ship at lightning speed, keeping your customers happy and your bottom line healthy.

However—**not all e-commerce orders are the same**. From bulk single-item orders to multi-SKU bundles, each order type brings its own requirements. That's why having the right workflow for the right order type is key to keeping things moving smoothly.

Let's dive into the top workflows you can use for the most common e-commerce order types, so you can fly through your pick lists, stay accurate, and smash those daily targets with confidence.

Common E-commerce Order Scenarios and Their Best-Fit Workflows

Scenario 1: Large Volumes of Identical Single-Item Orders

Typical examples: Flash sales, viral product launches, or peak sales periods (like Black Friday) where hundreds or thousands of orders all contain the exact same product.

Workflow Solution: **CartonCloud's Split Pick and Pack Wave**

Using this workflow, you can grab multiple orders in one-go, helping to reduce your walking time and get orders out the door in record speed.

Here's how it works:

1. **Find & group orders fast** – Use CartonCloud to search and filter all identical orders with a quantity of one.
2. **Pick in one smooth trip** – Pick all order items you need.
3. **Bring it all to the packing bench** – From CartonCloud's **Pack Screen**, you can generate and print all your labels in bulk, connect with carriers, and trigger carrier bookings — right within the mobile app.
4. **Auto-create consignment labels** – Using Pack Screen, you can also print your consignment labels on-the-spot.

Scenario 2: High Volumes of Single-Item, Multi-SKU Orders

Typical examples: Large numbers of single-item orders, but each one is a different SKU, color, or product (think water bottles in multiple colors, phone cases in different designs, etc.).

Workflow Solution: **CartonCloud's Split Pick and Pack Wave + Pack by SKU**

When each order has a different SKU, the real challenge comes at the packing stage—figuring out which order an item belongs to without slowing things down. Using Pack by SKU, you can skip the guesswork. Just scan, pack, and ship!

Here's how it works:

1. **Pick using Split Pick and Pack Wave** – Repeat the picking workflow as detailed above, and gather all order items in one smooth trip.
2. **Bring to the packing station** – Keep all items together and ready for packing.
3. **Scan your items with Pack by SKU** – In the CartonCloud mobile app, scan the product barcode, and the system instantly pulls up the first unshipped order needing that item.
4. **Mark as 'packed' automatically** – Once scanned, the order is updated in real time, so you can keep moving without any backtracking.
5. **Generate your labels with Pack Screen -** Prep your package for dispatch by connecting with carriers and generating labels (as mentioned above).

Scenario 3: Multi-Item & Bundled Orders

Typical examples: Subscription boxes, curated gift sets, kits, or any order with multiple items or bundles.

Workflow Solution: **CartonCloud's Pick to Tote**

When each order has a different SKU, the real challenge comes at the packing stage—figuring out which order an item belongs to without slowing things down. Using Pack by SKU, you can skip the guesswork. Just scan, pack, and ship!

> *"We've recently implemented the Pick to Tote functionality in CartonCloud, and it's been a great addition to our warehouse operations. As a 3PL working with B2C e-commerce clients, this feature is a must-have—so we're very happy to now have it in place.*
>
> *Since going live, we've seen a noticeable improvement in picking accuracy, and the packing process is much faster now that items don't need to be sorted at the packing bench."*
> **— Andres Fernandez, Birch3P**

When orders include several different products—or even full bundles—it's easy for items to get mixed up. Using CartonCloud's Pick to Tote feature, you can keep each order separated from the start—ensuring there are no cross-order mixups.

For this workflow, **it's important that you have a dedicated trolley equipped with totes.** As you move through the warehouse, you can pick items for multiple orders in a single run, placing each order into its assigned tote. Once picking's done, simply grab a tote, scan its barcode, and get it packed and ready for dispatch.

Here's how it works:

1. **Set up your totes –** Adjust your Pick to Tote settings to match your trolley capacity (e.g., if your trolley holds 30 totes, set your limit to 30 orders).
2. **Pick in one smooth run –** Move through the warehouse picking items for multiple orders at once, placing each into its assigned tote.
3. **Scan and pack –** Once picking is complete, grab a tote, scan its barcode, and prep it for dispatch using Pack Screen.

Why Pick to Tote is a Game-Changer for E-commerce:

- **Pick faster, fulfill more** – Slash wasted walking time by picking dozens of orders in one smooth run (that means more orders processed per hour, and the ability to keep up with high-volume spikes like flash sales).
- **Keep every order flawless** – By having each tote representing a single order, you can ensure each order is 100% accurate, every single time.
- **Pack with zero delays** – Totes arrive at the bench pre-sorted, so your team can pack and ship right away without any extra sorting steps.
- **Win customer loyalty** – Delight customers with subscription boxes, bundles, and curated orders that arrive on time, error-free, and exactly as promised.
- **Cut down on costly mistakes** – Fewer picking errors means fewer returns, fewer complaints, and less stress for your team.

Master Your Workflow with CartonCloud Academy
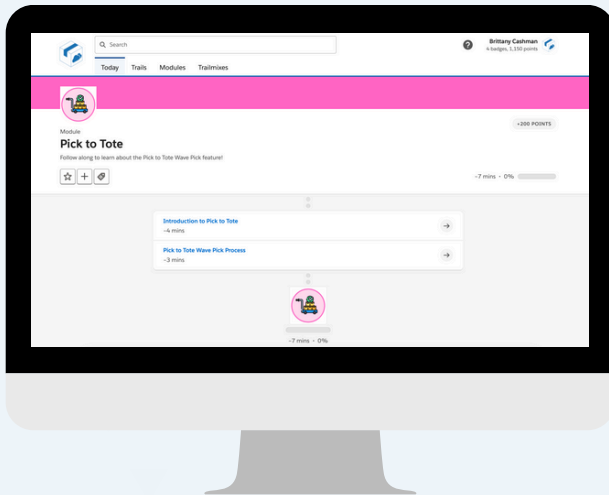
Our free **online academy** is your go-to for mastering workflows—watch each workflow in action, follow along with step-by-step videos and guides, and learn the pro tricks that can keep your team moving at top speed.

EXPERT CORNER

"When you've got a process that just clicks, your e-commerce fulfillment can flow effortlessly.

Use this checklist below to nail down the workflow that fits your needs best!"

**Javier Hernandez,
Implementations Consultant**

↘ CHECKLIST

- Do you regularly process identical product orders in bulk?
  → *Use Split Pick and Pack Wave for speed and bulk accuracy.*

- Are your orders mostly single-SKU but high in variety?
  → *Use Pack by SKU with a Split Pick and Pack Wave for fast, error-free packing.*

- Are multi-item or bundled orders common in your operations?
  → *Pick to Tote keeps orders organized and streamlined.*

- Is your team spending too much time searching/sorting at packing?
  → *Leverage barcode scanning to quickly pull up your orders.*

- Do you need to connect with your shipping carriers to generate labels?
  → *Use Pack Screen to do this right at the packing bench.*

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Chapter 5

Tailoring Your Workflows for Your Industry Niche

Every product category comes with its own set of requirements, especially when it comes to food, beverages, and health or medical goods.

Flexible WMS workflows help you stay compliant, protect inventory integrity, and keep operations running smoothly—no matter what's in your racks. Let's explore some of the CartonCloud workflows you can use for these top industry niches.

Food & Beverage: Keeping It Cool, Compliant, and Quick

Managing e-commerce fulfillment for food and beverage clients means keeping a close eye on storage conditions, safety standards, and turnaround times. For these clients, having a warehouse space that's equipped with both cold and ambient storage is essential to ensure every product is stored and handled properly.

Here are some top CartonCloud workflows that make handling these requirements easy:

- **Temperature Zone Management:** Easily create dedicated warehouse areas for frozen, chilled, or ambient goods all within your WMS, and set specific rules so every item is always stored in the right location.

- **Automated Charging:** Track and charge for storage by zone, making billing easy and transparent for clients with varied storage needs.

> **"**
> *"We have many different areas in our warehouse that have ambient temperature but also temperature controlled. [CartonCloud] allows us to see what type of space we have available for that customer and directs us exactly where to place [the stock] in the warehouse."*
> **— Cass Strunk, Founder, Core Logistic Services**

Health & Medical: Accuracy, Batch Tracking & Compliance

The health and medical sector brings a need for meticulous accuracy—whether you're managing supplements, pharmaceuticals, or medical supplies with expiry dates, serials, or batch numbers.

- **Batch & Serial Tracking:** Use CartonCloud to track expiry dates and serial numbers for each SKU. Features like FIFO (First In, First Out) or FEFO (First Expired, First Out) ensure you always dispatch the right products at the right time—reducing waste and meeting regulatory requirements. (Hint: you can also use **temperature zones** as mentioned above for this scenario depending on your product requirements.)

- **Barcode Scanning for Precision:** Implement **barcode scanning** and mandatory verification checkpoints, so pickers must confirm serial or batch numbers before items are picked. If something doesn't match, CartonCloud will flag it immediately, helping your team correct mistakes before they happen.

Chapter 6

Delivering Delight—Shipping & Tracking to the Customer's Doorstep

In e-commerce, fast shipping is only half the story—customers also want to see exactly where their order is, every step of the way! They expect to have real-time tracking, proactive notifications, and updates all the way from the warehouse to their doorstep.

For your e-commerce partnerships to thrive, your warehouse needs automated tracking, seamless shipping integrations, and proactive communication at every stage.

Let's walk through how to set up your shipping integrations with the CartonCloud integrations team, so you can streamline your shipping and give customers the visibility they need.

Step by Step: Your Roadmap to Shipping Automation

There are several major carriers and shipping aggregators that CartonCloud directly integrates with, like **Shippit**, **StarShipit**, Sendle, **MachShip**, **ShipStation**, and TechShip. When you integrate with these platforms, your shipping jobs are created automatically and all relevant shipping details tracking details are instantly pushed to the carrier, so you can keep things moving without delay!

Take MachShip for example: as soon as a sales order is ready in CartonCloud, the delivery address and item weights are sent to MachShip instantly, a tracking number is generated, and it's synced right back into your CartonCloud order—ready to share with customers via Shopify or any connected store.

EXPERT CORNER

"Setting up your integration to MachShip is straightforward.

Here's a look at how the process works with our integrations team."

**Mario Aguilar,
Integrations Manager**

Step 1 – We get to know your workflow
Our team begins by learning how you want the integration to work for your operations. We'll confirm everything is aligned between CartonCloud and MachShip—such as mapping your product codes correctly and setting the right trigger for when orders should be sent across (for example, once a Sale Order reaches *Packed* or *Dispatched* status).

Step 2 – We handle the tech talk
You give us your MachShip account details and any special requirements (such as if you need labels or consignment notes printed from CartonCloud, etc.). We take care of connecting CartonCloud to MachShip so they work together seamlessly.

Step 3 – Orders start flowing

From here, every sales order in CartonCloud automatically creates a shipment in MachShip with the address, item details, weights, and volumes already loaded.

Step 4 – Labels print where you work

We set up label printing to happen right in CartonCloud, so you don't have to jump between systems. This means you can keep packing without losing momentum.

Step 5 – Tracking goes straight to your customers

As soon as MachShip generates a tracking number, it's sent back into CartonCloud and pushed to Shopify (or other connected storefronts) so customers can follow their order in real time. Plus, your clients can see it all in CartonCloud's Customer Dashboard!

Find out more about how integrating CartonCloud's WMS with MachShip can automate your workflows in this **free webinar**.

How to Share Real-Time Tracking with Clients & Customers

Here are some top ways you can keep your clients and their end-customers always in the loop!

1. Customer Dashboards: You can give your customers direct access into CartonCloud so they can log in and view all order statuses and tracking numbers, 24/7.

2. Sync with Online Storefronts: Once your integrations are connected to your customer's online storefronts—like Shopify or WooCommerce—all tracking details will flow straight through automatically. This means customers can simply log in to their account and see real-time updates on their orders, without needing to reach out for status checks.
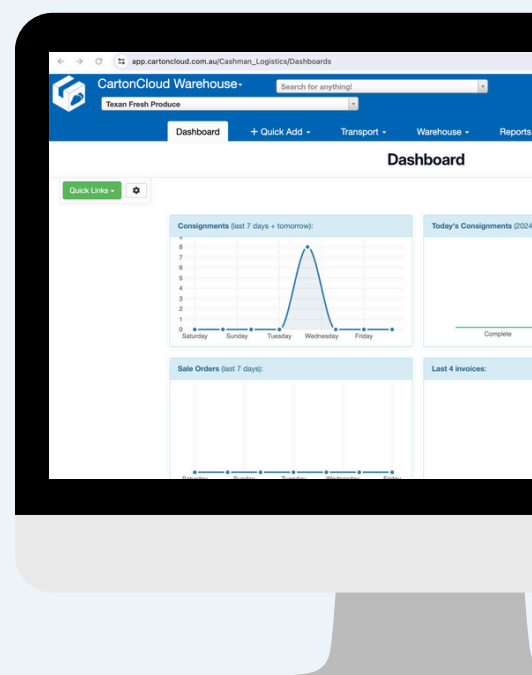
Chapter 7
Effortless Invoicing

Healthy margins are the backbone of e-commerce success—especially when each order comes with tighter margins than traditional B2B. The less time your team spends buried in admin, the more they can focus on moving orders out the door and growing your business.

That's why automating your invoicing is essential. Through easy integrations, you can set this up to all take care of itself: charges are captured as they happen, rate cards are applied automatically, and invoices are sent without a second thought. You save time, get paid faster, and never have to worry about missing a charge.

In this chapter, we will walk through how you can set this up so your invoicing runs smoothly in the background.

How Seamless Invoicing Works with Automated Billing

One of the key elements in e-commerce is capturing ad-hoc charges—especially for premium services like gift wrapping, custom packaging, or special handling. Now, the helpful thing about using your WMS is that you can automatically capture all of these charges (for both your bulk and e-commerce operations) directly in your system as your team picks and packs—so when it comes time to invoice your clients, you can have peace of mind that nothing gets missed.

From there, CartonCloud takes care of the rest—automatically generating invoices and sending them straight to your preferred accounting platform, like **QuickBooks**, **Xero**, or **MYOB** (meaning you don't even have to lift a finger or make any changes to your accounting process). Every order, service, and fee is logged automatically for complete accuracy, so your clients get clear, detailed breakdowns of all charges (and you get paid faster!).

Now that you know how automated invoicing can transform your e-commerce operations, let's set it up! Here's how you can easily integrate your WMS with your accounting system like QuickBooks.

## Step-by-Step: Connecting Your WMS to Your Accounting System

1. Connect Your Accounts - Head to your **Organization Settings** in CartonCloud, select the **Invoice** tab, and click **Connect to QuickBooks**. Sign in and approve the connection—this creates the bridge for all invoices to flow automatically.

2. Link Your Customers - Match each customer in CartonCloud to their corresponding record in QuickBooks. This ensures every invoice goes to the right place without you needing to double-handle it.

3. Sync Your Products & Services - Map your CartonCloud invoice classes to QuickBooks, so every charge lands correctly in your accounts.

4. Push Your Invoices (or Set It to Auto) - You can manually upload invoices from CartonCloud to QuickBooks at first, or take it to the next level by turning on **Automatic Upload** so the system pushes approved invoices for you—every time.

5. Automate the Entire Process - Enable automated emailing so invoices are sent to your clients instantly after they're pushed to QuickBooks. This means charges are captured as they happen, invoices are generated and sent without lifting a finger, and you get paid faster.

↘ CHECKLIST: BULLETPROOF BILLING FOR HIGH-VOLUME ORDERS

- **Integrate Your Systems** – Link your WMS with your accounting software (QuickBooks, Xero, MYOB) so invoicing runs in the background without extra admin.

- **Map Clients & Rate Cards** – Ensure every e-commerce client is linked in both systems, with rate cards covering all order types, services, and ad-hoc charges.

- **Capture Charges Automatically** – Log every fee, from pick & pack to premium extras, directly in your WMS as orders are fulfilled.

- **Automate Invoice Creation** – Set invoices to generate and push to accounting automatically, ensuring faster payment cycles.

- **Keep Invoices Clear & Current** – Provide clients with transparent, detailed invoices and review pricing regularly to protect margins.
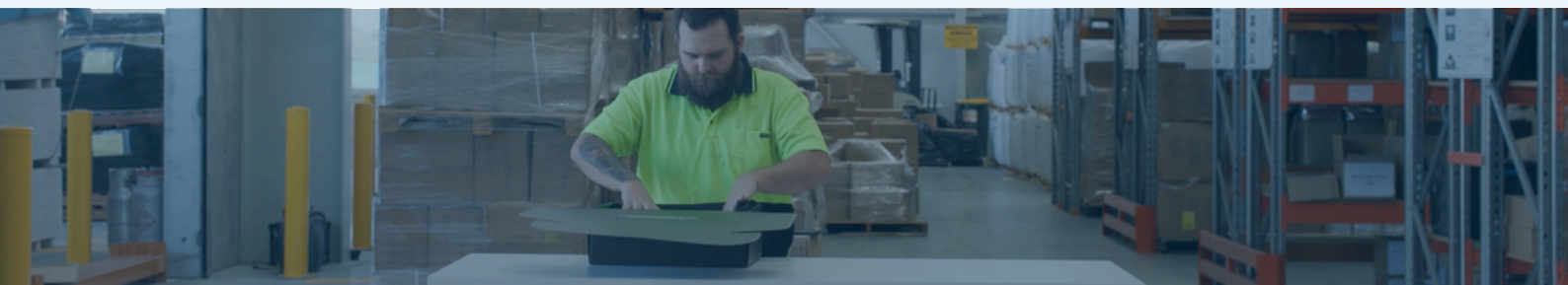
Chapter 8
It's All Happening Smoothly

You've now got everything you need—the know-how, the workflows, and the tech—to say "yes" to any e-commerce opportunity that comes your way.

Whether it's onboarding a new client in days, flying through a viral product drop, or tackling peak season like a pro, you're ready.

Take On Any Challenge With Confidence

Start saying yes to e-commerce! With CartonCloud in your corner, you can:

- **Move at lightning speed** – Get clients set up and shipping from day one.
- **See the payoff fast** – Save hours of admin, reduce overheads, and grow without adding complexity to your operation.
- **Keep it super simple** – Run it all from one connected platform that your whole team can master.

And the very first step? Just connect your client's online storefront to your CartonCloud WMS. From that moment, orders flow in automatically, stock stays in sync, and you can roll out the perfect workflow for every order type—keeping things fast, accurate and smooth.

E-commerce Wins: Success Stories

Nothing builds confidence quite like seeing it work in the real world! Across the industry, 3PLs and warehouses are transforming their operations by adding e-commerce alongside their bulk services—streamlining workflows, winning new clients, and growing faster than ever.

Here's a couple success stories from 3PLs who unlocked new revenue for their business by tapping into e-commerce.

CORE LOGISTIC SERVICES

Core Logistics Services, founded by husband-and-wife duo Cass Strunk and her partner, started Core with a mission to provide 3PL services for small-batch supplement and wellness products. Armed with the right workflows and a WMS built for e-commerce, Core quickly expanded their client base, tackled complex inventory challenges, and maintained top-tier accuracy—while keeping overheads low. Their story proves that with the right systems and support, even the smallest teams can punch well above their weight in the fast-paced e-commerce world!

TNS LOGISTICS

From their very first e-commerce client with over 600 SKUs to now servicing global brands, TNS Logistics has scaled their operations to handle high-volume, high-variety online orders with ease. By integrating CartonCloud directly with storefronts like Shopify, orders from anywhere in the world flow into their WMS instantly—allowing the team to pick, pack, and ship the same day. Paired with automated rate cards, accurate barcode scanning, and end-to-end tracking updates for customers, they've built a streamlined e-commerce operation that's fast, transparent, and ready to adapt for every new brand they onboard.

LEXINGTON LOGISTICS

Lexington Logistics is a white-glove 3PL based in Brisbane specializing in e-commerce and omnichannel fulfillment for emerging and boutique brands. From the very start—when they had just a handful of clients—Lexington implemented CartonCloud to integrate seamlessly with online stores like Shopify and WooCommerce, ensuring their orders flowed directly into the warehouse for same-day pick, pack, and dispatch.

This setup gave customers live visibility of stock levels, order status, and inventory reports through their own secure dashboard, while allowing Lexington to deliver a completely autonomous fulfillment process that still felt personal and brand-aligned. By putting systems in place early, they scaled smoothly to handle up to 100 orders a day, all while maintaining the premium, tailored service that makes them an integral extension to their clients' brands.

Keep Learning & Get Inspired

Your journey doesn't stop here! For ongoing inspiration and the latest tips:

- **Watch Success Stories on YouTube:** See how other warehouses are winning at e-commerce! Our video library is full of helpful workflow walkthroughs, case studies, and real-world how-to guides so you can hit the ground running.
- **Read the Blog:** Dive deeper into workflow breakdowns, automation tips, and customer interviews to optimize your fulfillment even further.

CHECKLIST: STAYING SMOOTH— E-COMMERCE BEST PRACTICE TIPS

Match each order workflow to your most common order scenarios - Choosing the right workflow for each order type—whether it's bulk single-SKU orders, multi-SKU bundles—minimizes wasted movement, speeds up fulfillment, and keeps accuracy high even under pressure.

Run regular inventory audits and keep stock synced between your warehouse and storefront - Frequent stock checks and real-time syncing prevent overselling, reduce backorders, and ensure customers only see what's actually available—helping to build trust and avoid any costly delays.

Keep your packing bench organized for your current order mix - A well-laid-out packing bench reduces time spent searching for materials, makes it easier to process high volumes, and keeps your packers in a smooth rhythm throughout the day.

Review and refine rate cards and billing rules on a regular basis - Keeping your rates and billing settings up to date ensures every billable activity is captured, your margins stay strong as order volumes grow, and your clients always receive transparent, accurate invoices.

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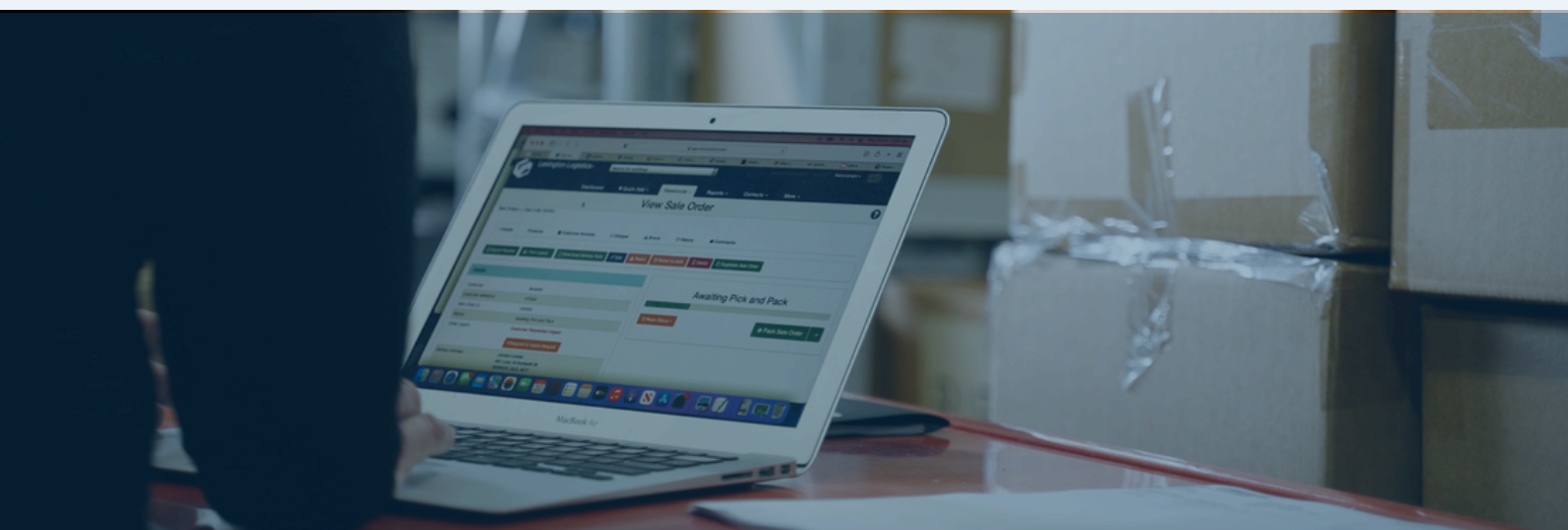
Chapter 9
Frequently Asked Questions (FAQs)

Before we wrap up, let's answer some of the top questions warehouse operators are asking about e-commerce fulfillment!

In this chapter, we break down some of the most common e-commerce fulfillment questions—and share top advice from our CartonCloud team!

Your Top Smooth Operator Questions —Answered by Our Experts!

Q1 How quickly can I get set up for e-commerce if I'm already running B2B?

A: Much faster than you think! With the right WMS and integrations, many warehouses are onboarding e-commerce clients in days—not weeks or months. Leverage your existing processes, and follow our onboarding steps to get started fast.

Q2 Can I use the same warehouse space and team for both B2B and e-commerce?

A: Absolutely. The workflows and tech you use for B2B are the perfect foundation for e-commerce fulfillment. A few smart tweaks—like adding pick faces, tote trolleys, and integrations to online storefronts—make it easy to run both operations from the same space.

Q3 How do I prevent stockouts or overselling across multiple online platforms?

A: Real-time inventory syncing is key! By connecting your WMS directly to all of your customer's online storefronts, it ensures inventory levels are updated instantly, across all platforms.

Q4 Can I automate shipping and tracking notifications for my clients' customers?

A: Yes! You can integrate your WMS with shipping carriers and storefronts to trigger real-time tracking updates and shipping notifications automatically. This keeps everyone in the loop and saves you from answering "Where is my order?" emails.

Q5 How do I keep up with e-commerce growth or sudden spikes in order volume?

A: Use the right workflow for the job! Each workflow in CartonCloud is designed with features tailored to specific e-commerce order types—because not every order is the same. Flash sales, subscription boxes, and high-SKU orders all need slightly different approaches to keep things moving smoothly. When you match the workflow to the order type, you can cut down walking time, pack faster, and keep accuracy sky-high—even when volumes spike.

Q5 What if my team is new to e-commerce workflows?

A: Training resources like CartonCloud Academy videos are designed for teams of all experience levels. Start with the basics and watch the workflow breakdowns to keep building your team's confidence and skills!

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