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The World of Ecommerce – Order Managers

Last month we took a quick look at the life of an Etailer; who in order to be successful with an on-line business must juggle many different aspects of their business on a daily basis. The accounting side tends to get moved further and further to the back burner, however using an Order Manager can really help automate the process.   If you missed the articles last month, be sure to check them out at http://www.idnac.org/newsletters/April_rmb.pdf and http://www.idnac.org/newsletters/ECom_Entry.pdf you may be surprised to learn that there is more to selling on-line than many people realize.

We will continue to use Yahoo store owners/platform in our series; however it is important to realize that whatever type of site, whatever platform, whatever cart they are using - they all face similar challenges. Most **Order Managers** can be configured to work with various platforms; but it is important that you find out 'where & how' your client is selling in order to recommend the correct solution.

The Order Process…

To understand why an **Order Processor** is important, you have to understand the process. For example, many of us are quite comfortable with shopping on-line, and we love the convenience of shopping at any time of the day or night, weekdays, weekends, even holidays. What we may 'forget' from time to time, is that there is someone very similar to ourselves on the other end; and a successful eMerchant is very conscience of their processes and customers. It is very important that they can fill the orders in a timely and cost effective fashion; and it requires more work than simply picking the products off a shelf and tossing them into a box.

The basic foundation of an order management system is a list of available products that can be ordered; which you will see on the website and generally includes the SKU number, product name, description, and price. Typically, customers can search the on-line store by keyword(s), browse by product category or interest, as most of us have no idea what the SKU will be for a particular product, so they make it as easy as possible for us to order.

Let's go through the basic process of capturing, processing, and tracking a customer's order. It's imperative that the order is delivered accurately, quickly, and in good condition. On the surface it may seem quite easy:

➢ When a customer places an order, it is 'captured' via their on-line store (this is when we have completed the check-out process when shopping on-line).

➢ After the customer has placed their products in their cart, the system will capture the customers' information, possibly present shipping options, record the payment information, and send a verification e-mail/receipt to the buyer.

➢ Most systems, such as Yahoo, have some type of real-time payment verification method; which authorizes the customer's credit card or verifies checking account information if they paid via eCheck. The store owner can set up filters to assist in catching fraudulent orders.

➢ Once the order has been 'captured,' it's time to fill it and ship it out. If the company stocks inventory, they will print a pick-list, collect the products, pack the box, update the order information, generate shipping labels, seal the box, and possibly send a confirmation e-mail to the customer with tracking information.

➢ If the company drop ships their products, they will send the order information to a warehouse or fulfillment company; which will complete the order process and then send updated status information back for each order to the company. Once the company receives the updated status, they must update their internal system.

However there is really more to it than that:

- ➢ Download/Review the Order for fraud -
  - o If the order is fraudulent, cancel it and possibly track the IP address so it can be blocked
  - o If the CSV or AVS code, address, name, or other information is not complete, mark the order as Pending. Contact the customer the next day for verification or information.
- ➢ Review or process the payment batches -
  - o Issue any refunds or exchanges
  - o Revise the order if back-ordered items exist; as it is illegal in many states to charge for an order/product that hasn't shipped
- ➢ Print the Orders or Pick List -
  - o Generate PO's for drop ship orders
  - o Gather the products, verify inventory
- ➢ Assemble the boxes, confirm the products, pack correctly -
  - o Weigh the package
  - o Enter or import the Shipping information to shipping software and calculate the cost
  - o Print the shipping label
  - o Import the tracking information from the Shipping program to the Order Manager
  - o Seal and send the order
- ➢ Send Confirmation e-mail to Customer
- ➢ Update all databases and add any special notes
- ➢ Handle any Back-Orders, Exchanges, or Returns

Now the Rest of the Story ☺

- ➢ What happens if a customer wants a product immediately, but its' not in stock? If the company realizes this after the item was logged, is it still a confirmed order? Can they respond to the customer is a reasonable time frame?
- ➢ What happens if the customer called instead of using the website? How will the company handle phone, snail-mail, or faxed orders?
- ➢ What happens if the order is fraudulent, or the customer didn't provide enough information for confirmation; who will call and how many times will the company try? At what point will the order be canceled?
- ➢ How will they be sure that enough inventory is available, but not to much?
- ➢ How will they track if they are profitable on their products? Is money being lost on shipping?
- ➢ Are trends being tracked correctly?
- ➢ Is it time to expand and add products? What about employees or a warehouse?
- ➢ Can lead time be reduced? What about eliminating repetitive tasks and physically handling the paperwork - how can it be accomplished?
- ➢ Databases! How many databases do we really need?
- ➢ Oh yeah, don't forget to …

Mis-management of the order process will lead to gaps in demand and fulfillment; if order commitments are not honored throughout, managing the status of an order at any given point will be impossible and it will cost the business money. An Ecommerce business must employ a system that manages orders, customer service, and inventory levels efficiently.

Your back-office should be as streamlined as your storefront; so you need to be able to process orders with **eCommerce** functionality.

- ✓ **Search:** Search for orders by various criteria; order number, name, email, etc.
- ✓ **Review Unfulfilled Orders:** Easily identify orders that have not be fulfilled
- ✓ **Review Fulfilled Orders:** Easily identify orders that have been picked, packed, shipped, and delivered

- ✓ **View Order Details:** Easily review any and all details related to a specific order(s)
- ✓ **Manage Shipments:** Print the pick list, pack the orders, weigh, print the shipping label, update with tracking information
- ✓ **Return Management:** Manage returns, exchanges, damaged or lost merchandise easily
- ✓ **Delete Orders:** Delete or cancel an order and update the system as needed
- ✓ **Update Orders:** Update orders within the system easily; such as address information, special notes, pricing, etc.
- ✓ **Accounting:** Export either detail or summary information quickly and easily to QuickBooks; accounting is not done within the Order Manager

Mid Level Order Processors….

Last month we took a close look at three Order Importers currently available for clients who are just starting to become automated, or who may not require features a full Order Manager Program offers. One program stood out in a big way; **The SuperManager Lite** (http://thesupermanager.com/smliteqb.html), which incorporates many nice features and actually fits into the Mid Level market as well as the Intro level.

This month we are going up a step; to mid-level Order Processors. Mid-Level Order Processors not only handle the product and sales information, it also automates the order process in general. Once a business starts taking more than a few orders a day, they realize how much time is being spent on double/triple entry, checking inventory levels, back-orders, picking, packing, shipping, customer service and follow-up. To be successful and grow, they must be efficient; that is where a good **Order Processor** can make an enormous difference! As with anything, each order processor that we will be looking at offer varied features and automation; decide what is most important to your clients business before you proceed. If you are not sure which product will work out best for your client, contact the developer; most are more than happy to provide a demo, discuss needs, and possibly offer customization for an additional fee.

Consolidating the orders into a single interface for submission, charging, tracking, routing, fulfillment, status queries, and follow-up will assist the company in their ability to access vital information at any given time. If the company can look at one screen and see where the order is in the process and communicate that to the customer, then everyone will have a complete picture of that order until it is finally delivered. Complete and efficient customer order history means you can view and manage pending orders by status, access order numbers by invoice, track by number or customer, view notes, manage back-orders, and anything else you can think of - easily.

Customer service and the ability to be extremely productive is key in the world of Ecommerce; especially when you consider many of these business are not working with a full staff and are probably also doing search engine optimization, ordering products, following trends, updating their site, learning HTML, dealing with suppliers, picking and packing orders, managing employees, and oh yeah … the paperwork!

Do They Still Need QuickBooks?

Yes! The **Order Managers** track products, customer information, and tracking/shipping information; *it does not, I repeat, it does NOT,* handle the accounting. In the intro to mid level markets, the client may have the choice to post customer and product information; however as they grow this becomes counter-productive. An **Order Manager** that will handle the customer and sales details, and post summary information to QuickBooks, will be needed at some point as the business grows.

A Few Good Products …

Now we have established when and why an **Order Manager** is needed over an **Order Importer**, or doing things manually; what are some good programs to look at? We picked three programs again this month; all integrate with QuickBooks and Yahoo Stores, and each has been tested with the same sample data for comparison.

We've selected:

> - **Shopping Cart Assistant** also known as WriteItOnce**,** from JTA Consulting (http://www.writeitonce.com/shoppingcarts/sca2002_features.htm)
> - **T-Hub**, from Atandra (http://www.atandra.com/Prod_THub.htm)
> - **The SuperManager, Full Version**, from SuperWare (http://www.thesupermanager.com/features.html)

The first thing you may notice, *The SuperManager* makes the list again this month. In addition to their **Lite** version that we profiled last month http://www.idnac.org/newsletters/SuperManagerLite.pdf they also have a full version … and it doesn't disappoint!   The ratings take into consideration price, ease of use, flexibility, scalability, and features.

Next month we will look at high level Order Management programs, and revisit Barney Stone from Stone Edge (www.stoneedge.net)! We will also learn about merchant accounts; what is really involved and how the process works.

Rox ☺

Shopping Cart Assistant also known as WriteItOnce**,** from JTA Consulting
(http://www.writeitonce.com/shoppingcarts/sca2002_features.htm)
Requirements: QuickBooks 2002 and Higher
Cost: $297 per license
Rating: ★★★★

Pros:

- ✓ Works with many shopping carts and eCommerce systems, include custom carts
- ✓ Captures Order data from multiple formats
- ✓ Items numbers on Website do not have to match what is in QuickBooks
- ✓ Unique part numbers can be created based on options for inventory tracking
- ✓ Supports multiple shipping and payment methods
- ✓ Imports can be configured to use generic names or details
- ✓ Changes can be made to orders before importing to QuickBooks
- ✓ Supports Yahoo Tracking for shipping
- ✓ Will automatically check orders against out of stock items and automatically notify customers (Microsoft Outlook required)
- ✓ Will print shipping labels and packing slips
- ✓ Will create import files for Shipping Vendors; such as UPS Worldship, FedEx, Stamps.com, and Endicia and will update orders with tracking information
- ✓ Can create import files to bring in credit card information into credit card programs if needed
- ✓ Can create import files, or automatically import, customer information in Contact Management programs
- ✓ Will not import fraudulent orders
- ✓ The program is customizable and offers free technical support

Cons:

- ✓ Initial set-up is not very user-friendly
- ✓ Requires a time-commitment to learn the program in general
- ✓ Error messages are not easily understandable
- ✓ Will not create items as needed
- ✓ Technical support can be slow
- ✓ Does not generate drop ship PO's automatically
- ✓ Does not track inventory within the program

Overall Impression:

The program is quite robust and once it is set up and the user has been trained, it is easy to use. Initially it can be frustrating and a client who is not comfortable with the computer will need assistance. It is customizable, however you will probably need to rely on JTA Consulting to make the changes; and unfortunately the turn-around time can be a bit slow – best advice would be to plan a few weeks of lead-time. The price is good and the program is stable. The program imported all orders successfully and recognized the duplicates. It works fine on a Mirrored Raid system. The interface could be easier/cleaner. The site offers some good screenshots of the program; however there is no FAQ page, QuickStart Guide, or User Forum. They will conduct remote assistance sessions, which is always nice.

T-Hub, by Atandra http://www.atandra.com/Prod_THub.htm
Requirements: QuickBooks 2004 and Higher, Microsoft Access 2000 Runtime Engine
Cost: $200 per license
Rating: ★★★

Pros:

- ✓ Automated or On-Demand order download
- ✓ Will handle multiple sales channels and profiles
- ✓ Ability to review and edit orders before posting to QuickBooks
- ✓ Will create customers and items on the fly
- ✓ Ability to enter and process Off-Line orders easily
- ✓ Integrated Shipping, UPS WorldShip support is built-in
- ✓ FedEx, USPS, and other Carriers supported thru ShipLogic (3rd party)
- ✓ Will handle Back Orders
- ✓ Credit Card processing already enabled for QuickBooks Merchant Service and Authorize.net
- ✓ Integrates with multiple platforms
- ✓ Flexibility in how orders are posted (Sales Receipt, Invoice, etc.)
- ✓ Captures Order data from multiple formats
- ✓ Easy to set up and learn

Cons:

- ✓ Does not generate drop ship PO's automatically
- ✓ Depends to much on the QuickBooks program
- ✓ Does not track inventory within the program
- ✓ In general, it does not offer as many features overall that an eMerchant requires in an Order Manager

Overall Impression:

The program is easy to set up and learn; and is somewhat customizable by the end-user. Technical support is quick and concise; they offer remote assistance as well. The price is good and the program is stable. The program imported all orders successfully and recognized the duplicates easily, it also provides an easy to read log of events. It works fine on a Mirrored Raid system. The site offers some good screenshots of the program, has a great QuickStart Guide, and offers a very helpful flash video tour. There is no User Forum at this time.

While I like the program, and find it easy to use and quite stable, it is really a step above an Order Importer; it lacks several features at this point to be considered as an Order Manager in the mid-level arena. I believe the program will grow, and as it does, I am confident it will stay as easy to use and as stable as it is now. Be sure to read the profiled article this month, visit their site, and provide feedback to the Developers so they may continue to improve on this solid program.

The SuperManager, the Full Version – By SuperWare, Inc. http://thesupermanager.com/features.html
Requirements: QuickBooks 2002 and Higher
Cost: $499
Rating: ★★★★★

Pros:

- ✓ Automated or On-Demand order download
- ✓ Items numbers on Website do not have to match what is in QuickBooks
- ✓ Unique part numbers can be created based on options for inventory tracking
- ✓ Supports multiple shipping and payment methods
- ✓ Imports can be configured to use generic names or details
- ✓ Changes can be made to orders before importing to QuickBooks
- ✓ The program is customizable and offers free technical support
- ✓ Extremely easy to set-up, learn, and use
- ✓ Export to any Shipping software
- ✓ Will create items in QuickBooks on the fly if configured to bring in details
- ✓ Will handle multiple sales channels and profiles
- ✓ Updates to orders are bi-directional – You can update the status of an order in the program and it will update Yahoo, including shipment status
- ✓ Scalable and Customizable
- ✓ Automatically creates PO's for drop ship orders
- ✓ Shipping Scale and Bar Code integration
- ✓ Supports Merchant Batches for archiving and reconciling
- ✓ Active On-Line User Forum
- ✓ Ability to skip canceled, fraudulent, or on-hold orders automatically
- ✓ Feature Rich Overall

Cons:

- ✓ Limited integration with other carts
- ✓ Some screens are small and cannot be resized
- ✓ The export log could be enhanced; the error messages could be somewhat clearer
- ✓ Inventory Management within program is lacking

Overall Impression:

While the price of this program is higher than the other two profiled, it is a bargain! The SuperManager is quite impressive in the ease of use, stability, integration, features, and flexibility. A typical end-user will have no problems installing and customizing the program. Technical assistance is never far away if needed, they are quick to respond and also offer remote assistance. The program imported all orders successfully, recognized the duplicates, and provided a log of events. It works fine on a Mirrored Raid system. The site offers some good screenshots of the program, has a good QuickStart Guide and comprehensive user manual, and has an active and well maintained User Forum – which is an invaluable source of support and information.

Quite frankly, just as their **_SuperManager Lite_** program comes in as one of the best programs I have ever used, so does their Full Version. They are filling a void in the market place in both areas for the eCommerce merchant - between the Lite version and the ease in which a user can upgrade to the Full featured Order Manager with this version, the eMerchant can transition easily and painlessly. I look forward to seeing where they take the program in the future; as I am sure it will only get better. It was specifically designed to work with Yahoo stores, so to support other platforms will require customization. However I can see the company adding other carts in the future, as the program is stable and already has many of the features an eMerchant truly needs in a mid-level Order Manager. A truly impressive program! Be sure to read the interview included in this month's newsletter.