



## Order Management System

Complete control of your order processes



**tradeit**  
ecommerce platform

# Order Management System

Integrated order processing, returns and replacements



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ecommerce platform

## Take total control of your orders

No matter whether you take orders through ecommerce websites or through call centres for direct mail and catalogues, the tradeit platform's order management system provides a unified view of all order activity across multiple ecommerce sites (multiple brands, domestic and international) and other channels (MOTO/ call centre, marketplaces and more).

Through the order management system merchants can control individual orders as well as maintaining their order processes, ensuring the best possible customer experience and smooth running of your overall ecommerce operations.

## Seamlessly integrated

The platform's integration hub provides multiple ways for punching out and feeding in data to, and from, other supporting business systems. Seamless integrations with WMS, ERP, PSP & CRM systems streamlines the order process ensuring the highest levels of service for customers and highest profitability for the merchant. We work with a number of leading fulfilment & ERP systems and service providers to deliver robust integrations.

## The benefits

- Greater customer satisfaction and smoother ecommerce operations.
- Centralised management of orders.
- Multiple integration methods for seamless communication with WMS, ERP & CRM systems.
- A unified view of order activity and statuses across multiple channels.
- Robust and scalable order processing, providing the perfect foundation to support growth.

### Mail Order, Telephone Ordering & Call Centre

Process mail and telephone orders, raise quotes, answer customer queries & tackle customer service issues through the storefront interface.

### Order Workflows

Order workflows designed around your business and manageable by merchants.

### Refunds & Replacements

Initiate and process returned items, refund customers or exchange goods.

### Integrated Fulfilment

A highly flexible and robust platform which is pre-integrated with leading fulfilment solutions and services.

# Managing Orders

Searching, filtering and sorting of orders

Orders can be searched for using a number of different criteria including: Order number, billing first name, billing last name, billing postcode and transactionID. There are also a number of filters that can be applied to narrow down your results including channel, order status and from / to dates.

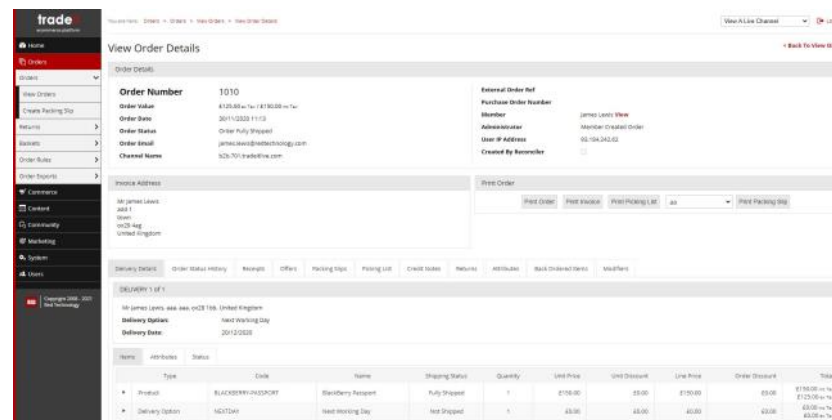
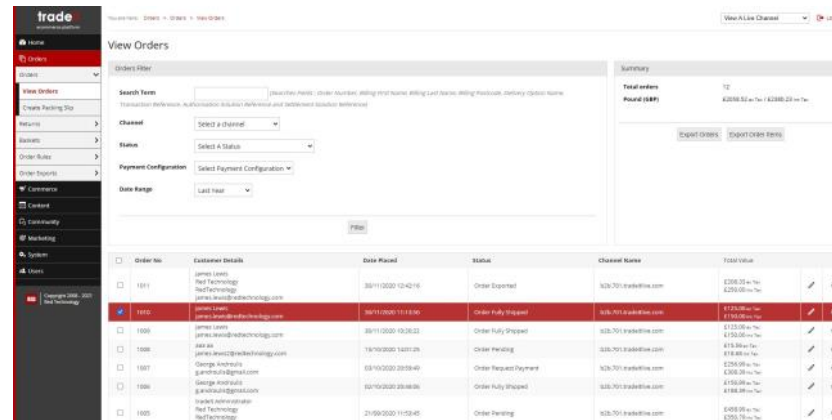


## Viewing Orders, Current Statuses & Status History

Viewing customer orders couldn't be easier. Merchants can use the advanced order search feature to quickly find and filter the orders that they want to view through the order management system.

The view order details screen contains comprehensive information for the individual order that you are viewing, including order details, shipping details (all addresses separately if delivery is split) and multiple payment details.

There are various tabs where merchants can break down the order line items, review the order status history and update order status, view receipts, view packing slips, view credit notes, view returns and view any special attributes associated with that order.



## Order Attributes

Custom attributes can be setup to capture additional information pertaining to a particular order. Examples include delivery instructions, delivery date, etc.

## Split Deliveries

If a customer chooses to split a delivery to multiple addresses, each delivery location and the unique details of that order is shown separately.

## Printing Orders, Invoices & Packing Slips

Once viewing an order, merchants can then print and view the order, invoice & packing slip.

# Managing Returns

Searching, filtering and sorting of returns

Much like orders, returns can be searched for using a number of different criteria including: Order number, billing first name, billing last name, billing postcode and transactionID. There are also a number of filters that can be applied to narrow down your results including channel, order status and from / to dates.

## Viewing Returns, Return Statuses & History

Viewing customer returns couldn't be easier. Merchants can use the advanced search feature to quickly find and filter the returns that they want to view through the order management system.

The return details screen contains comprehensive information for the filtering of returns based on their status and date.

Each return can then be drilled down into further to show additional information such as order date, order number, return date, return value, customer name, product name, unit price, total price, quantity and refund amount.

Order Number	Return Number	User Name	Date Created	Status	Channel Name
1861	1076	Julian Penning	31/03/2021 16:21:09	Return Complete	www.tradeit.com.au@tradeit.com
1362	1075	Julian Penning	31/03/2021 16:21:15	Return Failure	www.tradeit.com.au@tradeit.com
1899	1074	Julian Penning	29/03/2021 17:03:19	Return Complete	www.tradeit.com.au@tradeit.com
1819	1073	Henry Gardner	31/03/2021 17:07:47	Return Complete	www.tradeit.com.au@tradeit.com
1307	1072	Julian Penning	18/03/2021 14:07:32	Return Complete	www.tradeit.com.au@tradeit.com
1306	1071	Julian Penning	18/03/2021 13:06:40	Return Complete	www.tradeit.com.au@tradeit.com
1300	1070	Indel Admin@tr	14/03/2021 13:27:52	Return Created	www.tradeit.com.au@tradeit.com
1288	1068	Jonny Mann	14/03/2021 11:09:39	Return Created	www.tradeit.com.au@tradeit.com
1287	1068	Jonny Mann	14/03/2021 10:56:27	Return Approved	www.tradeit.com.au@tradeit.com
1286	1067	Jonny Mann	14/03/2021 10:56:09	Return Approved	www.tradeit.com.au@tradeit.com

Return Number	Return Date	Return Status	Return Reason	Requested Refund	Return Information
1076	31/03/2021 16:21:09	Return Complete	Customer Refused to Accept	400.00 - 0.00	Customer Refused to Accept
Request Reason	Request Reason	Request Reason	Request Reason	Request Reason	Request Reason
Request Reason	Request Reason	Request Reason	Request Reason	Request Reason	Request Reason
Request Reason	Request Reason	Request Reason	Request Reason	Request Reason	Request Reason
Request Reason	Request Reason	Request Reason	Request Reason	Request Reason	Request Reason
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Request Reason	Request Reason	Request Reason	Request Reason	Request Reason	Request Reason



## Return Statuses

The flexibility of tradeit means returns can be handled in numerous ways with several different statuses applied. These can run from the customer's initial request to return their goods through to processing or rejecting the return. The processes can be configured using the flexible work flows that are available in tradeit.

## Printing Orders, Invoices & Packing Slips

Once viewing an order, merchants can then print and view the order, invoice & packing slip.

# Workflows & Order Statuses

The end-to-end order journey

The tradeit ecommerce platform has been architected in such a way that it is incredibly flexible and scalable. The configurable workflows are an excellent example of this flexibility. Multiple custom workflows can be applied based on how your business works. Each workflow has a number of statuses that can be customised, increased and decreased to best suit business needs. A typical ecommerce site would use the following workflows:



ID	Name	SortOrder	EDIT	Go
20	Basket Abandoned	1	EDIT	Go
21	Basket Current	2	EDIT	Go
22	Basket Delivered	3	EDIT	Go

**Basket workflow**



ID	Name	SortOrder	EDIT	Go
2	Order Created	1	EDIT	Go
3	Order Accepted	2	EDIT	Go
4	Order Pending	3	EDIT	Go
5	Order Cancelled	4	EDIT	Go
6	Order Expired	5	EDIT	Go

**Order workflow**



ID	Name	SortOrder	EDIT	Go
28	Return Created	1	EDIT	Go
41	Return Approved	2	EDIT	Go
42	Return Approved - Awaiting Goods	3	EDIT	Go
43	Return Approved - Goods Not Required	4	EDIT	Go
44	Goods Received	5	EDIT	Go

**Returns workflow**

## Triggered Actions

As an order progresses through a workflow a number of actions can be triggered to help automate parts of the process. Whether that is keeping customers informed about their order or ensuring stock is handled correctly, the triggered actions help ensure your systems and operations run smoothly and in sync.

- Send email
- Increment status
- Trigger authorisation to be settled
- Trigger authorisation to be cancelled
- Re-allocate stock
- Process return and create corresponding replacement order or issue corresponding refund



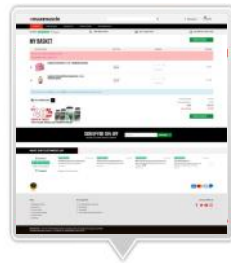
# Basket Workflow

There are a number of different scenarios where specific basket workflows can be of use to better handle events such as when a customer abandons their basket.



## Basket created (current)

Customer adds items to their 'current' basket.



Proceeds to complete the checkout process

Customer continues through the checkout order funnel.



To Order Workflow.

Save basket

Customer chooses to save their basket so as to add more to their order or checkout later.

Abandoned & persistent basket

Customer doesn't proceed to checkout and instead decides to leave the site without completing their purchase, abandoning their basket. When a basket is abandoned a customer can return to the site later and their basket is remembered (persistent basket).

## Pre basket abandonment re-engagement

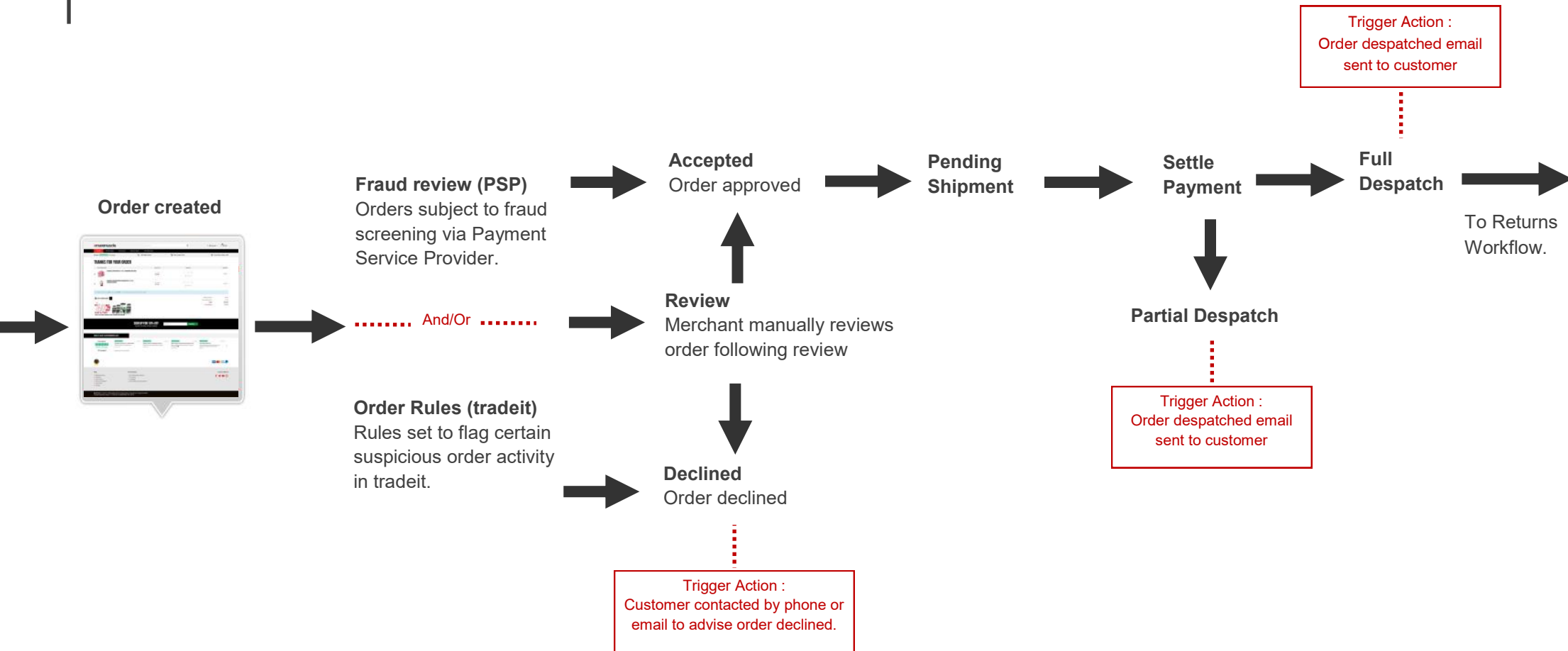
Once a customer has abandoned their basket the platform can automatically send a triggered email which is personalised with the details of their basket after x hours/days. It can be further merchandised to include promotions and present cross / upsell products, or include a unique, time-lapsed coupon to incentivise the user to complete their order.



Trigger Action:  
Abandoned basket  
email sent.

# Order workflow

Below is a typical payment workflow showing automatically triggered customer communications, integration of multiple payment methods and optional fraud screening step.



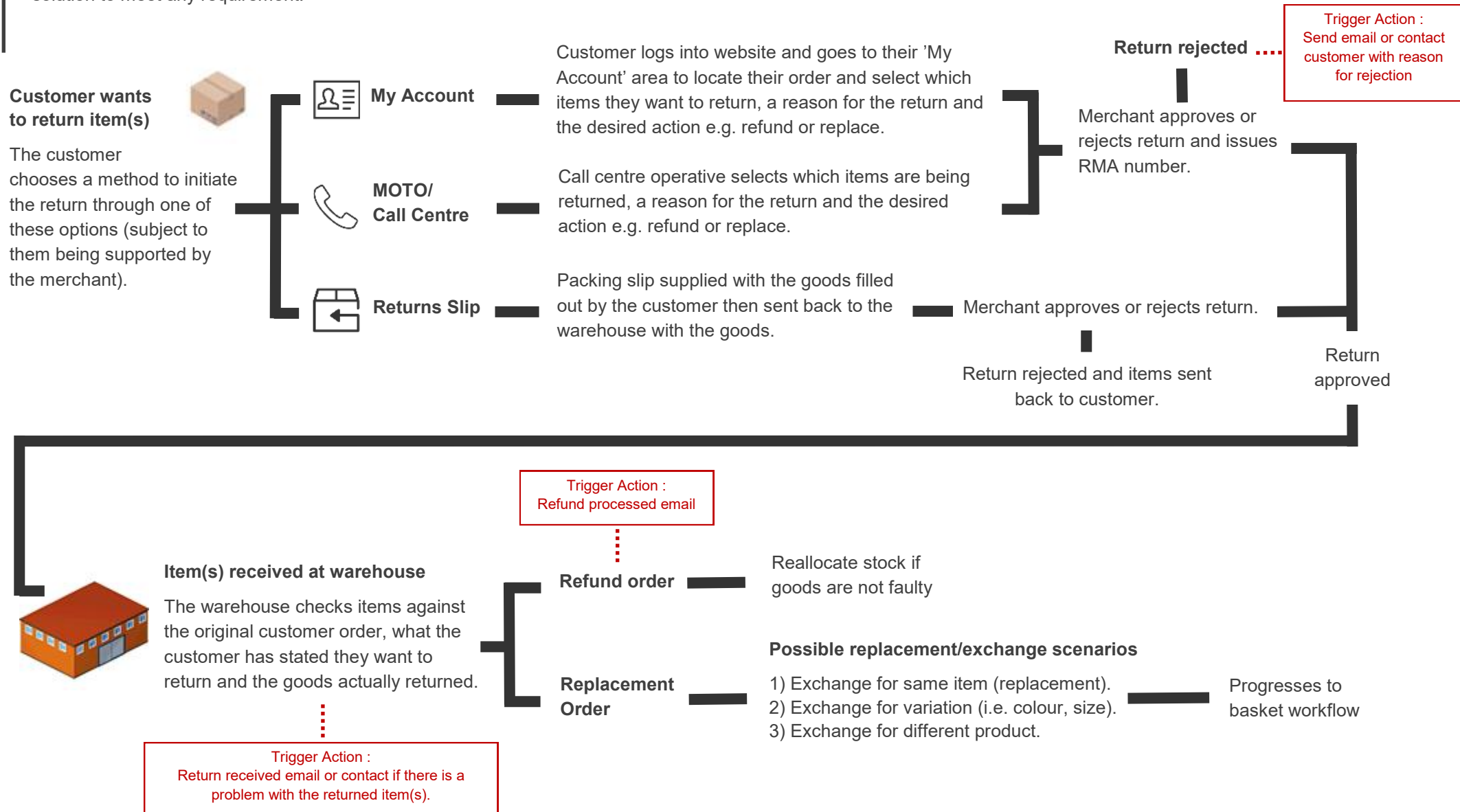
## Flexible payment options

tradeit is pre-integrated with most major Payment Gateways giving merchants greater freedom over the payment methods available to their customers.



# Returns Workflow

Below is a typical returns workflow (refund and replace). No two businesses are the same, it is for this reason that workflows within the tradeit ecommerce platform are incredibly flexible and customisable, enabling Red to tailor a solution to meet any requirement.





# Mail Order & Telephone Ordering (MOTO)

Call Centre tools & Endless Aisle capabilities



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## Gain a single customer view

Merchants can use tradeit's MOTO/call centre interface for processing telephone & mail orders and orders in store, creating customer quotes with adjusted pricing, and for handling customer queries or returns. The special call centre screens are accessible by any members of your team who have been given the necessary permissions.

Access to the call centre is available through the storefront, the same as if you were a customer logging in. Once in the call centre, administrative staff can either search for a customer to log in as or can log in anonymously to place orders and register new customers.



## Place Customer Orders

Create baskets as a customer would and checkout to place orders for customers ordering via mail, telephone or in store.

## Create Quotes

Build quotes on a customer's behalf, set pricing, add expiry date and then email to customer who can then convert to order online.

## Manage Customer Details

Change or update any customer details including address and contact details.

## View Past Orders

View all of a customer's orders here. You can also check on the status of any existing orders.

## Manage delivery addresses

The customer's stored delivery addresses can be viewed, updated and new addresses added.

## Manage Wish Lists

The customer's stored wish lists can be viewed, updated and added to. Reports can be run against all users' wish lists to show the most popular items.