

# Commerce & Orders

Complete control of your online orders,  
fulfilment and customer service



# Commerce & Orders

Complete control of your online orders, fulfilment and customer service



In this highly competitive ecommerce environment, merchants may only get one chance to impress a customer with on-time delivery of their products, great customer service and accurate billing. tradeit's commerce and order tools help merchants to ensure the smoothest operations, increase sales & customer retention, and deliver great customer service through the innovative suite of tools.

They allow merchants to take full control of their order processes from beginning to end, and encompass Checkout, Order Management, My Account, and MOTO/Call Centre functionality to maintain a single view of customer activity and provide the highest levels of customer support across any channel. As both retail and B2B businesses move towards an omni-channel approach, the distinction between channels narrows and customers expect the same experience regardless of touchpoint—tradeit's set of commerce and order management tools help you meet those expectations.



## Ecommerce Checkout

Keep customers engaged during the order process.



## My Account

Empower users to take control of their accounts and orders .



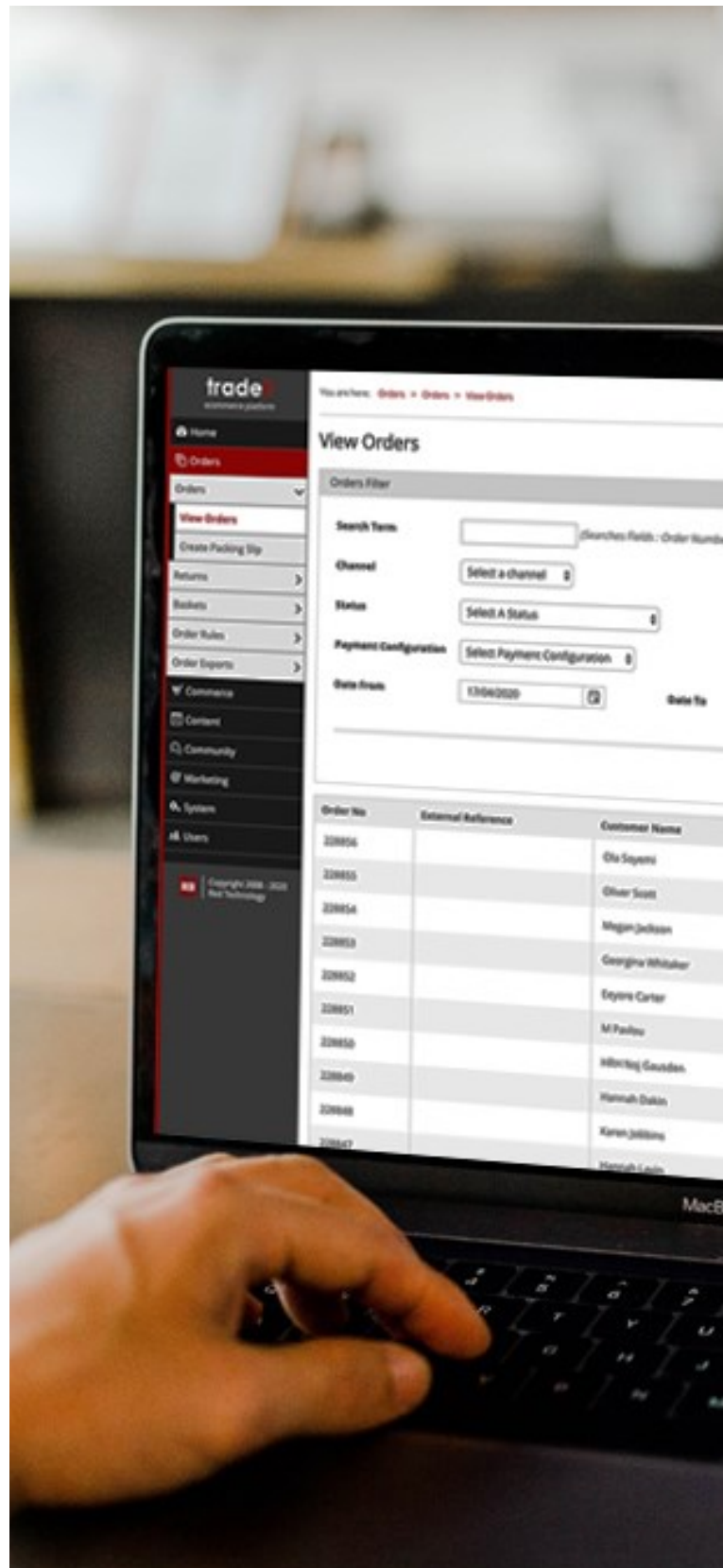
## Call Centre & MOTO

Process orders across all channels and improve customer relations.



## Order Management

Save time, reduce errors and increase customer satisfaction.



# Commerce & Orders

Complete control of your online orders, fulfilment and customer service



Key to delivering efficient ecommerce operations and ensuring customer satisfaction is complete control of your orders, and order processes. In **tradeit** it couldn't be easier to manage your orders, meaning your customer service teams are completely on top of things and able to provide the highest levels of service, fulfilment and returns/exchange management.

## Managing Orders

Merchants can use the advanced order search feature to quickly find and filter the orders that they want to view or export (main filters include: channel, order status, payment method, and date, as well as a free text search covering search options such as order number, billing first name, billing last name, billing order and transaction ID). Once they have located the order they want, they can view comprehensive details of it including customer information, billing and recipient details, as well as seeing the type, description and quantity of each individual line item on that order.

You are here: [Orders](#) > [Orders](#) > [View Orders](#) View A Live Channel ▾ [Log Out](#)

### View Orders

Orders Filter

**Search Term**  (Searches Fields : Order Number, Billing First Name, Billing Last Name, Billing Postcode, Transaction Reference, Authorisation Solution Reference and Settlement Solution Reference)

**Channel**

**Status**

**Payment Configuration**

**Date From**   **Date To**

Order No	External Reference	Customer Name	Date Placed	Status	Channel Name	Total Value	
Order 10		Customer J	24/04/2020 16:54:56	Order Ready For Export	www.scribbler.com	£0.00 ex Tax £0.00 inc Tax	
Order 9		Customer I	24/04/2020 16:54:55	Order Ready For Export	www.scribbler.com	£3.46 ex Tax £4.16 inc Tax	
Order 8		Customer H	24/04/2020 16:53:38	Order Ready For Export	www.scribbler.com	£0.00 ex Tax £0.00 inc Tax	
Order 7		Customer G	24/04/2020 16:51:49	Order Ready For Export	www.scribbler.com	£3.29 ex Tax £3.95 inc Tax	
Order 6		Customer F	24/04/2020 16:51:42	Order Ready For Export	www.scribbler.com	£0.00 ex Tax £0.00 inc Tax	
Order 5		Customer E	24/04/2020 16:49:27	Order Exported	www.scribbler.com	£3.29 ex Tax £3.95 inc Tax	
Order 4		Customer D	24/04/2020 16:49:08	Order Exported	www.scribbler.com	£3.29 ex Tax £3.95 inc Tax	
Order 3		Customer C	24/04/2020 16:48:22	Order Exported	www.scribbler.com	£3.29 ex Tax £3.95 inc Tax	
Order 2		Customer B	24/04/2020 16:48:06	Order Exported	www.scribbler.com	£3.29 ex Tax £3.95 inc Tax	
Order 1		Customer A	24/04/2020 16:46:33	Order Exported	www.scribbler.com	£0.00 ex Tax £0.00 inc Tax	



### Order attributes

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



### Multi-address delivery

If a customer opts to split an order for delivery to multiple addresses, each delivery location and the unique details of that are shown separately.



### Printing orders, invoices and packing slips

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

# Ecommerce Checkout

Keep customers engaged during the order process



Designed and engineered to keep customers engaged during the order process, tradeit's customisable ecommerce basket and checkout helps reduce abandonment whilst simultaneously providing merchants with opportunities to increase basket size, order value and conversions with relevant cross-sells, up-sells and promotions.



## Merchandising & personalisation

The basket is customisable and flexible enough to automatically offer personalised customer content. By linking it to customer accounts you can tailor not just the information shown to individual account holders, but also personalise offers, prices, vouchers, promotions and layout to ensure maximum conversion rates and automatically incorporate upgrade, accessory and up-sell features.



## Split orders/deliveries

A single basket can be split between multiple international delivery addresses including those items that require collection from stores/collection points/trade counters or those items on back order and scheduled delivery dates. tradeit allows each item or group of items to use a different fulfilment method, different taxation rules, different promotions, different messaging, different gifting options, but output as a single order to an ERP system.



## Gifting

tradeit delivers class-leading gifting capability at the basket including numerous gift wrapping types, boxes, baskets, hampers etc... as well as gift messages and scheduled arrival dates. Users can even add external messaging such as 'Do not open until...' or send items anonymously as a surprise. In conjunction with split orders, all gifting options are available on an item or group level as well as basket



## Omni-channel basket

tradeit delivers Click & Collect/Click & Reserve services directly through the platform or via integration to a third party ERP or similar system, enabling you to offer customers the ability to send their goods to stores, or trade counters, for collection. tradeit can also manage any complex movement of items between stores, or from a central warehouse, to aid fulfilment of these services as well as providing customers with the ability to check store stock levels online.



## Multiple shipping options

Ensure your site offers a good fit between your fulfilment capabilities and your customers' shipping needs with accurate and flexible delivery options. Delivery costs and type can be based on products, destination, weight, size, and fulfilment type with the ability to cater for awkward products such as bulky, heavy items or those requiring two-man delivery. There is also the ability to integrate with third party shipping and duty calculators and special fulfilment services like Shutl.



## Multiple payment options

Cater for multiple payment types including credit/debit cards, invoice, subscription, on account, pre-paid credit, gift cards/vouchers, as well as 'bill me later' services. The flexibility of the checkout also allows for payment to be split between credit/debit cards and multiple gift cards. tradeit has been integrated with many leading payment providers including CyberSource, TRU//ST Payments, Worldpay, PayPal, Datacash and Klarna to ensure secure online payments as well as providing alternative payment methods such as Apple Pay.

# Ecommerce Checkout

Keep customers engaged during the order process



**Fast & intuitive**

**tradeit** features both registered member and guest checkout designed to restrict any barriers to conversion and ensure the process is quick and hassle-free. Numerous tools such as address auto-complete, single page checkout, multiple payment options, enclosed basket, saved details from previous login (including addresses, tokenisation of card details, baskets, account details, preferences etc..), all help increase speed, avoid abandonment and significantly increase conversions.



**Global ecommerce**

**tradeit**'s checkout is designed to cater for international ecommerce and is capable of handling multiple currencies (with variable or floating options), multiple tax regions (including NEXUS in the US), multiple, international payment methods and multiple, international fulfilment types all delivered to your customers using their local language(s) including Cyrillic and symbol-based text.



**Order rules**

Set up additional rules at the basket to help improve fraud protection and check for suspicious orders before they are processed. **tradeit** allows you to define and flag unusual customer activity when orders are placed (see below).

## Order Rules

Unfortunately ecommerce sites are a common target for fraudsters and thieves. In order to help combat this practice, **tradeit** offers customisable order rules which can help merchants flag any suspicious orders in the administration system, and then manually check them, before they are processed. These could include things such as:

- New customer places their first order.
- Order value exceeds £x, \$x, €x etc...
- Number of orders placed by a customer during a certain timeframe exceeds x (merchant specified number).
- Customer billing address/shipping address are different.
- Customer delivery postcode is x.
- Customer billing postcode is x.
- Quantity of a single SKU exceeds x.
- Company is x.
- Order attribute equals x.

# My Account

Empower users to take control of their accounts and orders



Reduce the load on your business and empower your customers with **tradeit**'s advanced set of retail and B2B self-service tools, helping your customers manage their own account and orders online. The enhanced 'My Account' provided to customers is a powerful and flexible feature for both Retail and B2B ecommerce sites.



## Customer details

Customers have control of their personal details like order history, statuses and tracking, billing & shipping addresses, passwords, communication preferences, saved baskets, wish, gift or wedding lists, product reviews & ratings (plus review history), loyalty balance or spend & save target, subscriptions and a personal calendar with reminder functionality for important dates.

**tradeit**'s built in community functionality also enables them to manage their connections and uploads from their my account.



## Business to Business

**tradeit** contains a rich set of tools specifically designed for B2B users and, as such, the My Account has options to reflect these functions including quick order pads, quote requests, viewing and paying invoices online, building, editing and maintaining wish lists, and exporting previous orders. **tradeit** also features master and sub account management enabling one central location to control multiple regional sites and set credit limits, purchasing capability, payment of orders etc...



## Wish Lists/ Gift Lists

Customers can build and manage multiple wish lists, gift lists or wedding lists, and define each, enabling them to add, remove or edit products and share them via email. You can report against all customer wish lists for targeted marketing and merchandising purposes, as well as using them to drive metric-based recommendations.



## Loyalty / Spend & Save

Customers can check their points balance, see how much it's worth and when the points expire or if they are using a spend and save scheme, they can see their target and progress for the current time period, last time periods result and how long left they have to hit their target. They can also see any valid coupon codes they have and their expiry date.

# My Account

Empower users to take control of their accounts and orders



## B2B My Account

**tradeit** is designed to provide sophisticated ecommerce functionality for retailers, manufacturers, distributors and wholesalers selling directly to their customers. It also supports those who want to cater for both their retail and trade channels, through the platform's multi-site capabilities.

As a result, **tradeit**'s My Account is extremely flexible and malleable, with the functionality extending well beyond that of a traditional ecommerce My Account. Not just through enhanced features within the B2C/retail side (such as multiple wish lists and built-in calendar reminders) but also through functionality specifically aimed at B2B/trade users such as:



### Master & Sub Accounts

Master and sub account functionality to manage regional sites/offices/staff and control their accounts including: approving/rejecting order requests, managing credit limits, paying invoices and more.



### Invoicing

View any previous or outstanding invoices and balances, including the ability to pay for them online using a credit or debit card. Plus, see any credit limits applied to the account.



### Simple re-ordering

Base Quick order pad, saved baskets and easy re-ordering of previous products for more efficient user checkout.



### Quotation system

Submit quote requests which can then be returned by the merchant with pricing. These can then be added straight to the basket for ordering online.



### Order export

Export previous orders in .CSV format, or print them for use in other capacities.



### Taxation

**tradeit** handles complex tax calculations across different tax jurisdictions including Nexus (US) and can also be integrated with a VAT checker like VATLayer.com to ensure B2B customers are VAT registered during checkout.

# Call Centre, MOTO & Endless Aisle



Process orders across all channels and improve customer relations

**tradeit's** call centre functionality gives you a single view of all customer activity allowing you to process mail, telephone and in-store orders and handle customer enquiries from a central system, increasing sales and customer satisfaction.



## Single customer view

Process orders via mail, email, phone, fax or in-store (on a tablet device or kiosk) alongside all orders via your ecommerce channels, giving you a single view of all customer activity and streamlining your order management. Customers can then access all of their order information via their My Account.



## Secure payments

Integrate with services like PCI-PAL Agent Assist, or via PDQs in-store, meaning payment is completely secure and your sales staff never have access to sensitive customer information such as payment details or passwords, but you can still process orders from any channel.



## Promotions

Administrators can apply, or remove, any offers on qualifying orders created via any channel (online, mail, telephone, or in-store) including selecting multiple free products and their variations (size, colour, flavour of products for example). Administrators can also debit or credit loyalty points on a user's account.



## Returns, refunds & replacements

In conjunction with an integrated ERP or warehouse management system, **tradeit** can process any returns, refunds or replacements. Once an item is returned and the system is notified, administrators can login to approve or reject the return, as well as actioning any refund or replacement.



**tradeit** offers complete omni-channel functionality, helping merchants unite their online and offline channels. Providing the capability to take secure customer payments over the phone is crucial to meeting PCI compliance and providing customers with a comprehensive service.

By integrating **tradeit** with PCI-PAL Agent Assist, your call centre operatives can handle sensitive payment card information over the phone whilst ensuring they meet the requirements of PCI DSS.

Customers use their telephone keypad to enter card information so that it is never shared directly with the agent, but they remain on the phone in order to provide any assistance and process the payment once all the card details have been entered by the customer.

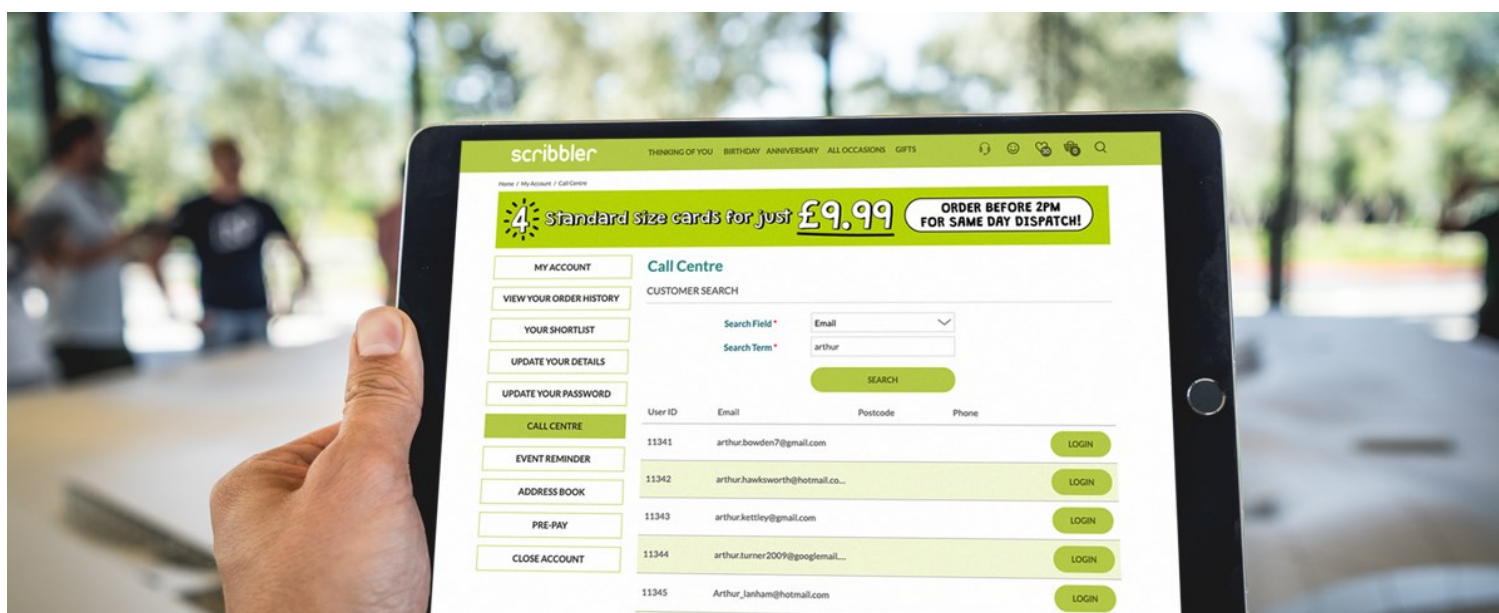


# Call Centre, MOTO & Endless Aisle

Process orders across all channels and improve customer relations



The call centre system uses the same storefront as your ecommerce site meaning your authorised sales staff can login as customers and see exactly what they see, or proceed anonymously if they don't have an account. There are also options to search for existing customers using any details they may have in order to retrieve their details, or restrict administrators to view and amend only their customers.



This enables them to carry out actions on their behalf (create accounts, change details, view order history or statuses, wish lists and even place orders for them) as well as resolving any problems they have, helping you to deliver a first class service across all channels. It also enables them to override product prices or add restricted products at the basket and order on the customer's behalf. They can also add or modify shipping costs or delete line items after the order has been placed, and send a new payment request or refund to the user following any change.

For those retailers with stores, Endless Aisle also runs using the call centre tools meaning it's very simple, cost-effective and intuitive for staff to use. The system enables store staff to proactively arm themselves with tablets, ready to give customers instant, accurate, and up-to-date product information and availability on the shop floor. They can find stock on a customer's behalf, both in stores and from online inventory and if an item they want is out of stock in store, then staff can instantly place an online order for it and have it delivered directly to any address, or to any store for collection. In order to comply with PCI-DSS regulations, payment is taken via in-store PDQs so staff never have access to customer card details or passwords.

# Order Management

Save time, reduce errors and increase customer satisfaction



Delivering class-leading order management and fulfilment is crucial to saving time, reducing errors and increasing customer satisfaction. Ensure your customers receive exactly what they expect, when and where they expect it, by controlling all aspects of your order and fulfilment processes.



## Orders, invoices and packing slips

Easily filter orders by date, channel, payment method etc... and view full order information including product details, billing and shipping addresses, status, receipts, packing slips, credit notes, payment method and returns. You can also print orders, invoices and packing slips from the same screen.



## Order statuses

Ensure visitors are kept informed throughout every stage of their order with triggered email updates whenever the status of their order changes, from their initial order confirmation, picking and packing through to any partial or full-despatch notes, and even after sales satisfaction emails or feedback requests.



## Order Management System

tradeit's order management is designed to effectively handle orders from multiple channels, providing merchants with high levels of control over their ordering and fulfilment processes, delighting your customers and ensuring the smooth running of your operations.



## Warehousing

Set up and route orders through the relevant channel and warehouse, defining picking days and cut-offs times. tradeit supports single or multiple warehouses with each channel having a primary warehouse assigned and an optional secondary warehouse if stock is unavailable at the primary location. Certain products can be excluded if it's not practical or financial viable to route them from another location. Physical stores can also act as warehouses in their own right when orders for collection are fulfilled directly from store stock, or stock is moved between the stores for fulfilment. Warehouses can even be assigned on a customer level rather than by channel if required.

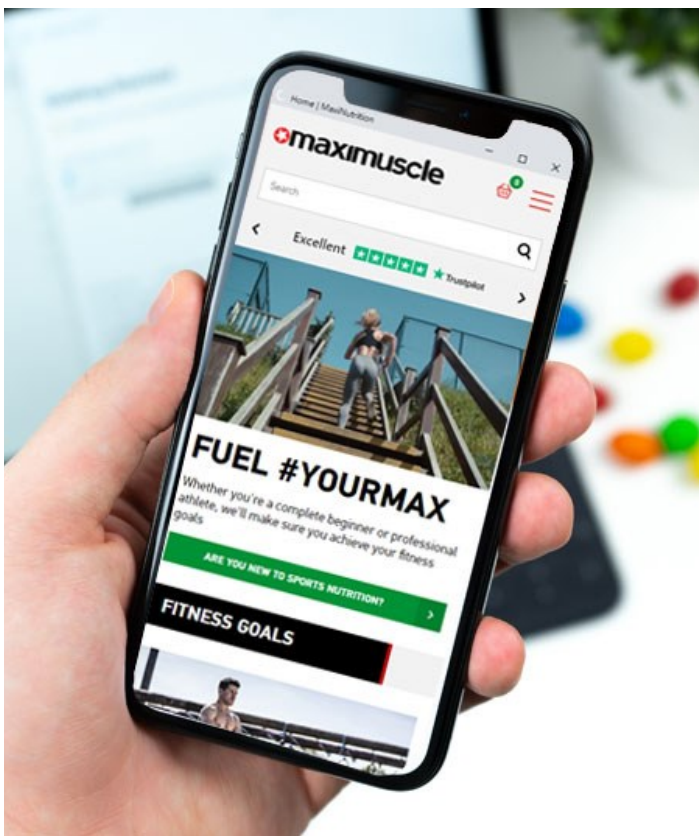


## Flexible fulfilment types

Control and manage multiple delivery and fulfilment types (such as same day, next day, scheduled, timed, store collection etc..) alongside any location information like UK mainland, Europe and RoW for example. You can determine which products are eligible for which delivery types (including which stores for any collections), their delivery cost, tax class, which days they are available on, expected delivery dates, which channels they are eligible on, as well as any special requirements or surcharges that are applicable.

# Why Red Technology?

We deliver world-class ecommerce solutions by combining the power of our award-winning ecommerce platform **tradeit** and our range of complementary ecommerce services. We forge long-term partnerships through consultation, design, development and support of your ecommerce eco-system, meaning you can focus on growth through products, marketing, merchandising and customer service.



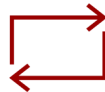
## Award-Winning Solutions

We have over 15 years' experience of delivering best-in-class ecommerce solutions for our customers that are recognised and rewarded across the industry.



## Class-Leading Platform

The **tradeit** ecommerce platform offers ultimate scalability and flexibility, coupled with strong multichannel capabilities, rich functionality and a clear roadmap for platform innovation.



## Expert Integrators

Seamlessly joining together your critical business systems for improved efficiency and ease of management. We're ecommerce integration experts.



## Comprehensive Support

We pride ourselves on providing 24/7/365 responsive support services for both your ecommerce site and your hosting environment.

**Call us**

01865 880 800

**Email us**

info@redtechnology.com

**Visit us online**

www.redtechnology.com