



# Order Management System

Take control of your order processes



Checkout



Order  
Fulfilment



My Account



Call Centre/  
MOTO



## Order Management System

**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 Order Management System (OMS) helps merchants to ensure the smoothest operations, increase sales & customer retention, and deliver great customer service through the innovative suite of tools.**

It allows merchants to take control of their order processes from beginning to end, and encompasses checkout, order fulfilment, my account and MOTO/Call Centre to maintain a single view of customer activity and provide the highest levels of customer support.

### The benefits

- ☑ Gain a unified view of all order activity/statuses across multiple channels (Web, Phone, Mail, In-store) with configurable actions when statuses change (i.e. send an email, contact customer).
- ☑ Detailed view of all order and customer details, with comprehensive search and filtering options.
- ☑ Greater customer satisfaction and smoother, more efficient, ecommerce operations.
- ☑ Support for multiple warehouses and channels, meaning orders can all be routed accordingly.
- ☑ Reduces load on businesses by empowering customers with tools to help manage their own account and orders.
- ☑ Robust, flexible and scalable with configurable order workflows designed around your business.
- ☑ Multiple integration methods for seamless communication with WMS, ERP, RMS & CRM systems.
- ☑ Roles-based access means administrators can control who can see, and action, what within the order management area of the platform.

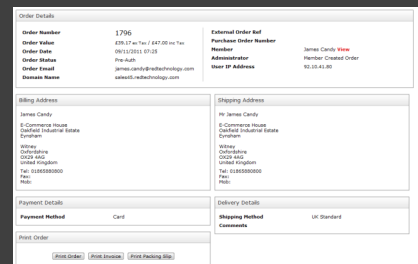
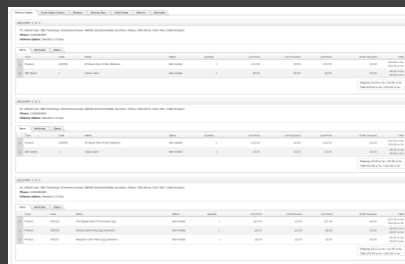
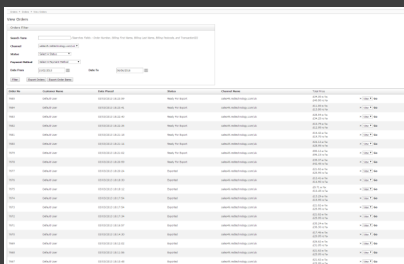
Key to delivering efficient ecommerce operations and ensuring customer satisfaction is complete control of your orders, and order processes. In **tradeit** it couldn't be easier to manage your orders, meaning your customer service teams are completely on top of things and able to provide the highest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

## Managing Orders



### Viewing orders, statuses & history

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.



### 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 Deliveries

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.

## 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.



# Checkout

**Ecommerce basket and checkout functionality can make or break an ecommerce store. It must accurately present order information in a way that actively encourages customers to complete a purchase and not act as a barrier to sales.**

**tradeit's** basket and checkout components are fully customisable and proven to be a highly effective sales tool, meeting the needs of both retail and B2B customers to dramatically improve conversion rates and boost sales.

*"The Price Alert feature is stand out for me, the power it gives to buyers and the feedback it can give suppliers is a feature most sites would benefit from."*

Head of Technology, Peto Ltd

## Features

- ☑ Pre-built integrations with leading payment providers such as CyberSource, Secure Trading, Klarna and PayPal ensures safe, secure online payments for both merchants and customers.
- ☑ Handles multiple and complex international tax and shipping requirements.
- ☑ Supports multiple payment methods including invoice, credit/debit card, direct debit, on account, subscription, gift cards and 'bill me later' services like Klarna.
- ☑ Enables multi-address delivery from a single order (see below for more details).
- ☑ Handles multiple currencies and tax zones for unlimited and complex B2B or retail pricing structures including tiered and volume-based, gross and net pricing.
- ☑ Split payment between credit/debit card and gift cards.
- ☑ Completely configurable with address auto complete and form data checking to help speed up checkout process for users.
- ☑ Persistent shopping basket based on cookie
- ☑ Caters for both member and guest checkout.
- ☑ Supports complex order rules that are merchant definable and completely administrable in **tradeit**.

## Single Order, Multi-recipient

**tradeit's** checkout is enhanced to cater for the demands of the omni-channel consumer and provides the ability for orders to be split on a line-item, or group level, within the basket.

### Delivery Addresses

This means that a single order can be sent to multiple delivery addresses throughout the world, including any physical stores or trade counters/collection points that a merchant might have.

### Fulfilment

Each of the line items or groups of items within a basket can use a different fulfilment method (including from physical stores — If the item is in stock and that particular service is offered), or taxation system.

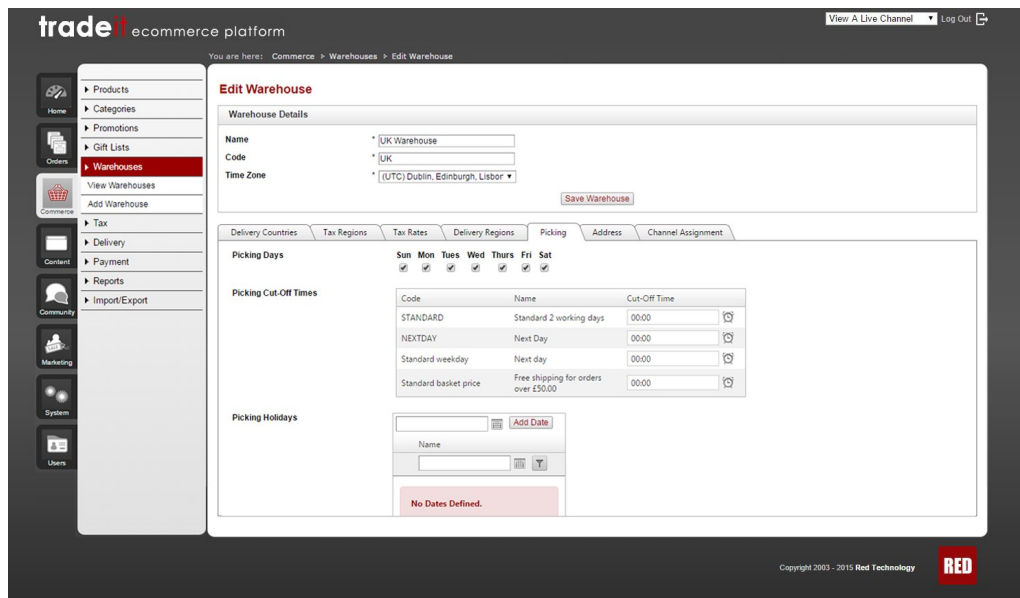
Delivery of items can also be scheduled to arrive on specified dates, anonymously (ideal for Valentine's) or on back order for when they become available.

### Gifting

Separate gift wrapping, bags and cards can also be assigned to any line item or group, each with a unique message.

### B2B

Its not just for retailers though as splitting the basket allows central purchasing offices to place one order and have different items shipped to satellite locations but still invoice one cost centre.



## Order Fulfilment

**Allowing customers to place orders with ease is only one element of their journey and user experience. Ensuring that their order is delivered, when, where and how they expect, as well as making any returns, refunds or exchanges easy to manage is just as important.**

tradeit's order management is designed to effectively handle orders from multiple channels, providing merchants with high levels of control over ordering and fulfilment processes.

*"The manual process of fulfilling orders used to take us up to 4 days, now it is a 10 minute process."*

Direct Sales Manager, Black Library

Our goal is to make the ordering and fulfilment processes as fluid as possible across all channels to delight your customers and ensure the smooth running of your operations.

## Features

- ☑ Enables orders to be routed to multiple warehouses for fulfilment from different locations.
- ☑ Flexible fulfilment rules and workflows configurable around your business requirements (order picking times and dates can determine when order is shipped and thus when customer receives it - includes merchant definable cut-off times, bank holidays etc...).
- ☑ Includes the capability of splitting a single order to multiple delivery addresses and handling all of the fulfilment complexities when integrating it with ERP, stock management systems, and physical stores/ collection points.
- ☑ Caters for partial or full despatch of orders including allowing for items on back order or any pre-orders.
- ☑ Integration with services like Shuti for rapid fulfilment of online orders from physical store stock, or collection of items from a Hermes ParcelShop location.
- ☑ Can automatically trigger events based on order status changes, such as sending an email when order is partially or fully despatched or available for collection in store (if offering Click & Collect/Reserve).



## My Account

**tradeit's customer self-service features reduce the load on your workforce whilst simultaneously empowering your customers with an enhanced set of tools that help with managing their account and orders.**

Powerful and flexible, **tradeit's** My Account functionality can cater for the uniquely different requirements of both retail and B2B customers, or a combination of both if required.

*"The My Account area saves us having to constantly update customer information."*

Website Manager, Capital Hair & Beauty

## Features

- ☑ Full customer management of their contact and address details, orders & order history (including order tracking if integrated with fulfilment provider), reviews, preferences, wish lists, invoices, subscriptions and more.
- ☑ Personal address book for storing and naming all delivery addresses.
- ☑ Set significant dates (birthdays, anniversaries etc...) in a calendar and be reminded by automated email when they are due.
- ☑ Manage and view multiple wish lists.
- ☑ Record of previous or outstanding product reviews, based on order history.
- ☑ Manage any interactions, uploads and connections when using **tradeit's** enhanced on-site social commerce functionality.
- ☑ Flexible and configurable to meet merchant's requirements for either retail or B2B users, or a combination of both if required.

## 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, 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:

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

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



## Call Centre/MOTO & Order In-store

**tradeit's Call Centre/MOTO functionality helps to centralise the management of orders and customer service processes enabling merchants to gain a more unified view of their customers, whilst improving customer service and communications.**

Use it to empower your customer service team and take secure phone and mail orders with ease. Not only that, ensure you never lose business and delight your customers by arming your in-store staff with tablet devices and the ability to place customer orders on the shop floor!

## Features

- ✓ Gain a single view of customer orders and activity by processing web, phone, in-store and mail orders through the same system — retrieve, view and amend customer information.
- ✓ Enhance your customer service with administrators able to login and replicate exactly what the customer sees, and action things on their behalf.
- ✓ Combine with PCI-PAL Agent Assist to process secure payments over the telephone, or use web chat software for online help.
- ✓ Use in conjunction with your ERP or WMS to process and approve or reject customer returns.
- ✓ Merchant-assigned administrators can login and create orders on behalf of existing customers or setup new accounts and do the same for guests.

PCI-PAL



**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.

# Why Red Technology?



## Class-leading ecommerce platform

Highly flexible and scalable **B2B & Retail ecommerce platform** with strong multichannel capabilities, rich functionality and a clear roadmap for future innovation.



## The company we keep

We work with some of the **UK's leading retailers, manufacturers, distributors and wholesalers** on both their B2B and Retail channels.



## Expert systems integration

Seamlessly joining together your critical business systems for **improved efficiency and ease of management**.



## Award-winning ecommerce sites

Over 15 years experience of delivering **best-in-class ecommerce sites** for our customers that are recognised, and rewarded, across the industry.



## Solutions built for personalisation & sales

Don't just take orders, actively **sell to your users 24/7/365** with our powerful marketing & promotions tools.



## Proven return on investment

Delivering the tools you need for **substantial online growth** and a **significant return on investment**.



## Complete ecommerce agency services

Complete range of ecommerce agency services from **Consulting, Design & Implementation** through to continued **Development, Hosting & Support**.



## Our expert ecommerce knowledge

We share our **insight into the ecommerce industry** gained over the last 15 years and **hundreds of successful website deliveries**.



## International expansion

Fully localised options for tax, language, currency etc... enabling you to **expand internationally into new markets**.



## Responsive web design

We deliver **ecommerce sites optimised for all device types** including TV, desktop, tablet, phablet and mobile, across multiple breakpoints.

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01865 880 800

**Email us**

info@redtechnology.com

**Visit us online**

www.redtechnology.com