



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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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, 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.

The screenshot displays the 'Order Details' screen. It includes sections for Order Details (Order Number: 1796, Order Value: £39.17 inc Tax / £47.00 inc Tax, Order Date: 09/11/2011 07:25, Order Status: Pre-Auth, Order Email: james.candy@redtechnology.com, Domain Name: sales@redtechnology.com), External Order Ref (Purchase Order Number, Member: James Candy View, Administrator, User IP Address: 92.10.41.80), Billing Address (James Candy, E-Commerce House, Oakfield Industrial Estate, Eynsham, Witney, Oxfordshire, OX29 4AG, United Kingdom), Shipping Address (Mr James Candy, E-Commerce House, Oakfield Industrial Estate, Eynsham, Witney, Oxfordshire, OX29 4AG, United Kingdom), Payment Details (Payment Method: Card), and Delivery Details (Shipping Method: UK Standard). Below this is a 'Print Order' section with buttons for 'Print Order', 'Print Invoice', and 'Print Packing Slip'. The 'Delivery Details' section shows 'DELIVERY 1 of 3' and 'DELIVERY 2 of 3', each with a table of items and a summary of shipping and tax costs.

Type	Code	Name	Status	Quantity	Unit Price	Unit Discount	Line Price	Order Discount	Total
Product	305940	Everything Sheeter (medium)	Item Added	1	£22.00	£0.00	£22.00	£0.00	£22.00 inc Tax
Gift Option	1	Classic Card	Item Added	1	£0.00	£0.00	£0.00	£0.00	£0.00 inc Tax
Shipping: £2.00 inc Tax / £3.95 inc Tax									
Total: £26.95 inc Tax / £29.90 inc Tax									

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.

View Returns

Returns Filter

Search Term (Searches Fields : Order Number, Billing First Name, Billing Last Name, Billing Postcode, and TransactionID)

Channel

Status

Date From Date To

Order Number	Return Number	User Name	Date Created	Status	Domain Name	
19146	6914	Admin User	31/03/2015 10:45:06	Return Recieved - Refund Processed	www.avenue32.com	View Go
19146	6913	Admin User	31/03/2015 10:45:06	Return Recieved - Refund Processed	www.avenue32.com	View Go
19146	6912	Admin User	31/03/2015 10:45:05	Return Recieved - Refund Processed	www.avenue32.com	View Go
19146	6911	Admin User	31/03/2015 10:45:05	Return Recieved - Refund Processed	www.avenue32.com	View Go
19046	6910	Admin User	30/03/2015 09:00:03	Return Recieved - Refund Processed	www.avenue32.com	View Go
18992	6909	Admin User	30/03/2015 09:00:03	Return Recieved - Refund Processed	www.avenue32.com	View Go
19197	6908	Admin User	30/03/2015 09:00:03	Return Recieved - Refund Processed	www.avenue32.com	View Go
18848	6906	Admin User	30/03/2015 09:00:02	Return Recieved - Refund Processed	www.avenue32.com	View Go
18848	6905	Admin User	30/03/2015 09:00:02	Return Recieved - Refund Processed	www.avenue32.com	View Go
19084	6904	Admin User	30/03/2015 09:00:02	Return Recieved - Refund Processed	www.avenue32.com	View Go

1 2 3 4 5 6

View Return

Return Details

Return Number 6914

Return Date 31/03/2015 10:45:06

Return Value €0.00 ex Tax / €927.50 inc Tax

Return Status Return Recieved - Refund Processed

Return Reason D

Required Action Refund

Return Information Customer Refunded 927.50 on 31/03/2015 10:59:04

Return Item Allocation Pending Approval

Channel Name www.avenue32.com

Order Number 19146

Order Date 17/03/2015 16:57:23

Member Admin User View

Return Items Return Status History

Product Code	product Name	Ordered Qty	Unit Price	Line Price	Total Qty	Refund Amount
PRE0011404051001M	Preen by Thornton Bregazzi	1	€ 1855.00	€ 1855.00	1	

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.

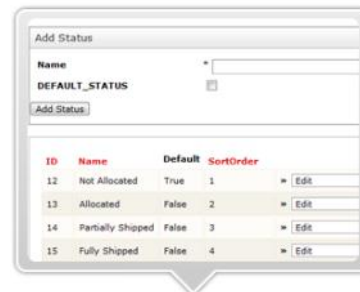
Workflows & Order Statuses

The 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:



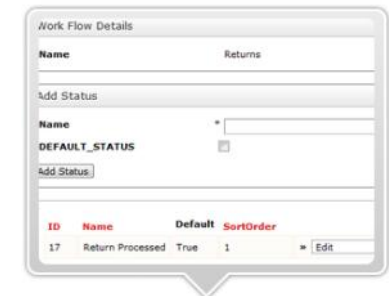
ID	Name	Default	SortOrder	
1	Current	True	1	» Edit
2	Temporary	False	2	» Edit
3	Abandoned	False	3	» Edit
4	Ordered	False	4	» Edit

Basket workflow



ID	Name	Default	SortOrder	
12	Not Allocated	True	1	» Edit
13	Allocated	False	2	» Edit
14	Partially Shipped	False	3	» Edit
15	Fully Shipped	False	4	» Edit

Order workflow



ID	Name	Default	SortOrder	
17	Return Processed	True	1	» Edit

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

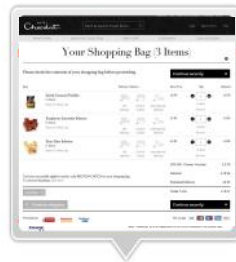
Basket workflow



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 order abandonment re-engagement

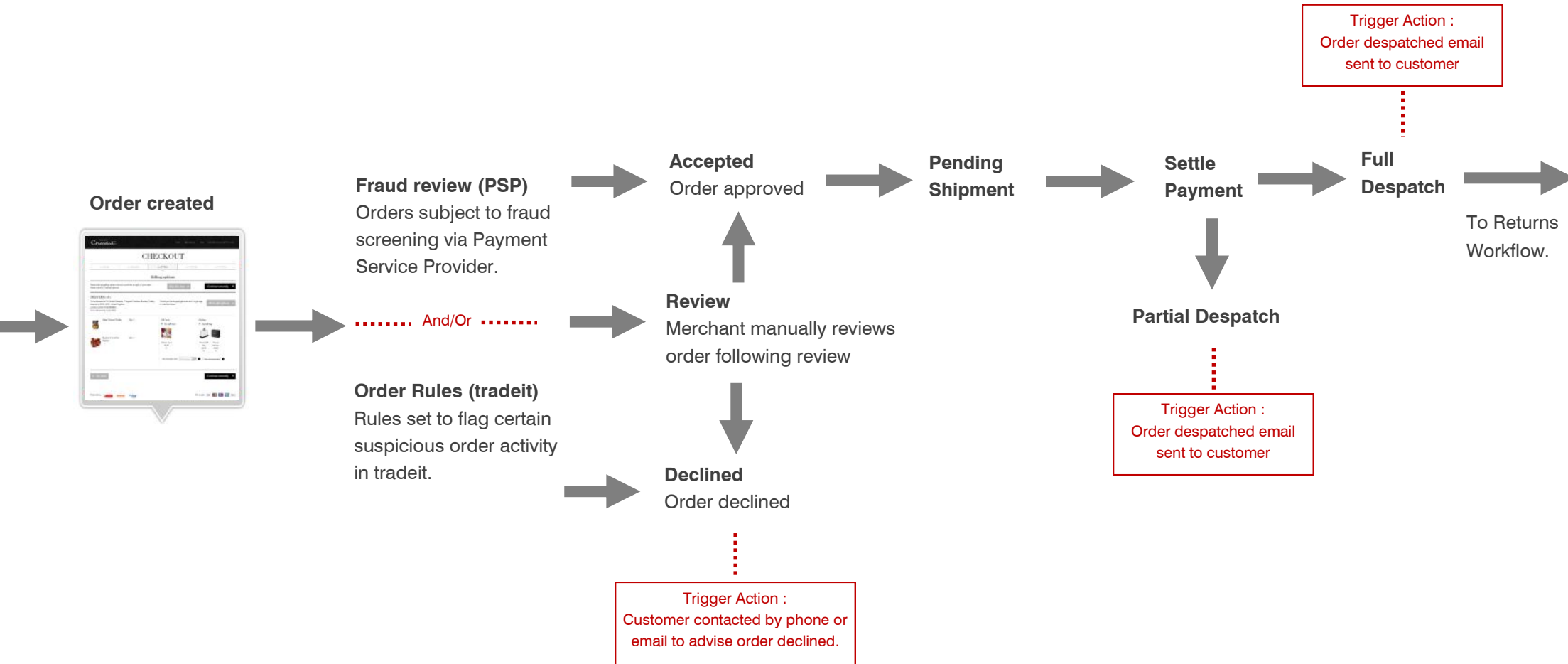
Once a customer has abandoned their basket the platform can automatically send a triggered email which is personalised with the details of their basket. It can be further merchandised to include promotions and present cross / upsell products, or include a unique, time-lapsed coupon to incentivise the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

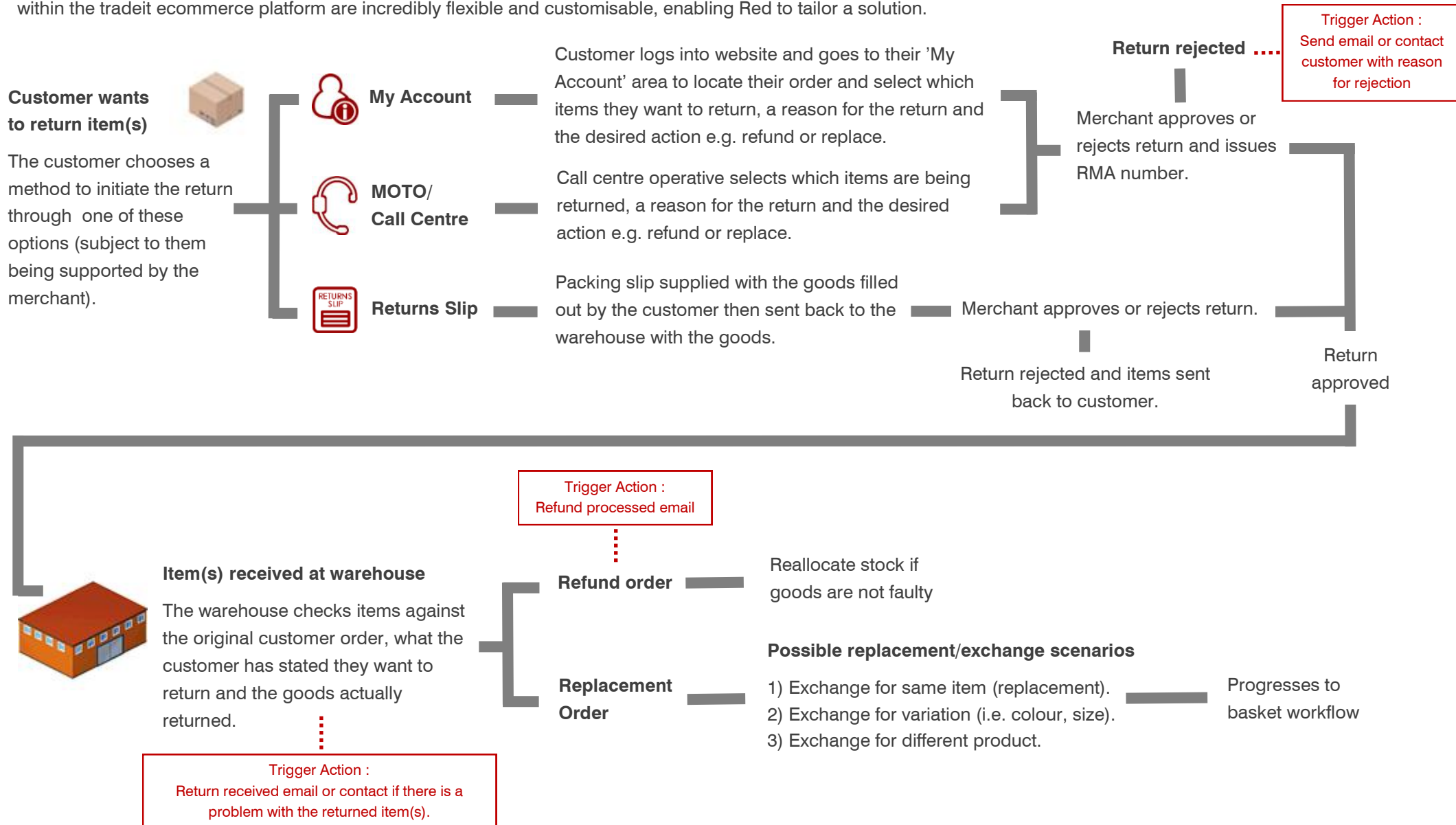
tradeit is pre-integrated with most major Payment Gateways giving merchants greater freedom over the payment methods available to their customers.



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.





Mail Order & Telephone Ordering (MOTO)

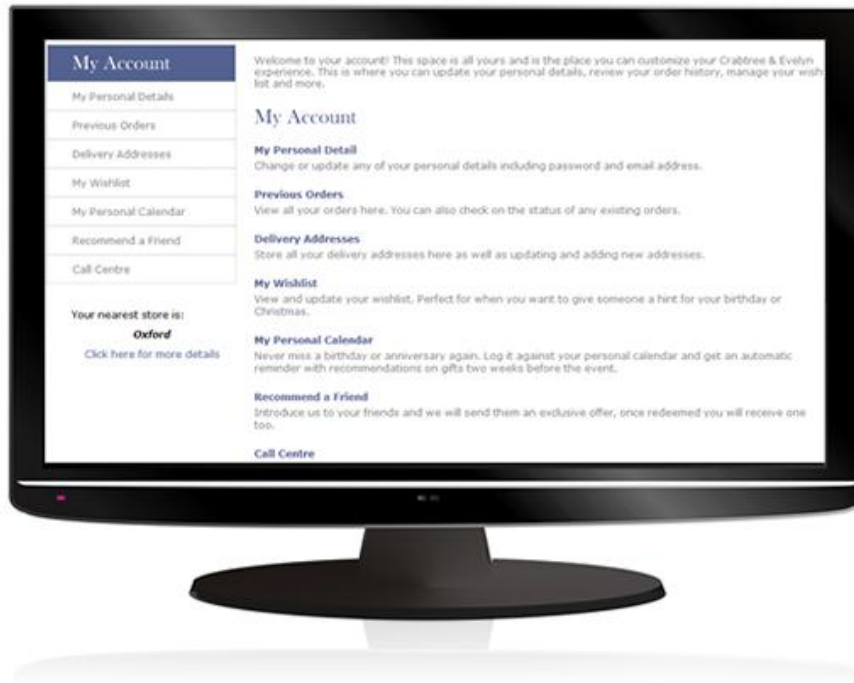


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Gain a single customer view

Merchants can use tradeit's MOTO/call centre interface for processing telephone orders, mail orders and for handling customer queries or returns. The special call centre screens are accessible by multiple 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 or telephone.

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.