

The World of Ecommerce Entry Level Order Importers/Managers

Ecommerce, Order Importers, & Order Managers: Where do you Start?

Last month we started our series on eCommerce with the help of Barney Stone, President of Stone Edge Technologies, Inc. (www.stoneedge.com) and an overview on what the world of eCommerce has become. Please be sure to check out Part II of Barney's Article http://www.idnac.org/newsletters/OM_PartII.pdf for 'the rest of the story.' It's amazing to me that so many people still equate the world of eCommerce with the old 'dot.com' days; obviously the landscape has changed, but it is a viable and highly respected business when operated correctly.

Approximately 80% of my client's are 'Etailers,' specifically on the Yahoo platform ... and they are quite successful. This is a subject that I could talk about for days and never be bored; the nature of the business, the add-on products, and the people, are wonderful and always a pleasure to work with. For the rest of our series we will be looking at different 'levels' of Order Managers, so when a client contacts you for assistance you are ready to 'talk their talk' so to speak ☺ During this series, I will be referring to Yahoo a lot; however all of this information applies to any eCommerce client.

Where to Start ...

I'm sure you are wondering what the difference is between an Order Importer and an Order Manager, and when it makes sense to recommend one over the other. That is a question I get on a weekly, if not daily, basis; so it is very important to truly understand what your client needs, not just want they want.

You must first start out by finding out how they are currently managing their business, specifically:

- What platform is their site built on
- What shopping cart do they use
- Are they using any add-on's
- Do they carry inventory or drop-ship; or maybe it's a combination
- Do they have a brick and mortar store, or is one in the near future
- How much is being done manually that can be automated or managed better (usually this comes down to getting basic information into QuickBooks so they can forecast and grow their business)
- Do they have QuickBooks now, if so, is it useable
- Do they have employees or use call-centers

Obviously there are other questions you will need answered, however the above gives you enough information to get moving forward without overwhelming anyone.

Approximately half of my clients are new to the world of eCommerce; the other half have been in business a few years and are at the point now that they need to start looking at some type of automation. Regardless if they are a new or established store owner, the idea of automation can be a bit intimidating.

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The New Store Owner ...

Let's take a look at a new store owner for a moment; they are already overwhelmed with so many things that come with starting up a web-based business. For instance:

- They have researched and decided on their Product, Web Platform, and Site Design
- Typically they have built their own site to start; so they have had to learn some code, new software, how to update the site without 'breaking' it, and rank in the search engines
- They are learning along the way about merchant accounts, shipping products and execution, suppliers, and even computers
- They are dealing with customers in a different way than a brick and mortar business, and it can be 'interesting'
- They have more paperwork than they ever thought imaginable, and it's growing
- They are trying to manage their finances, update their site, keep products in stock, keep up with their market, provide excellent customer service, and they are still learning how the 'back-end' of their 'stores' work
- They are trying to do everything themselves; and typically working a full-time job other than their web-based business

The new store owner is so overwhelmed that they cannot see the 'forest for the trees' and even mentioning the words 'Order Manager' can freak them out. There are others that have been in business for 6-12 months, or more, that KNOW they need an order manager, but are still reluctant.

In all honesty, the management of their finances tends to go on the back burner; or in box, drawer, folder, floor ... you get the picture. They check their bank balance often and realize that to grow their business they must get this under control. Once they make that call, we start advising changes to their financial software (if they have any), and another program to start getting organized and automated ... and all the sudden it feels like another daunting task; but we can make it much easier for them. Depending on their business overall, they may need a simple solution, or something more complex; more on that in a minute.

The Established Store Owner ...

The established store owner has dealt with all of the challenges above, and then some. They may have a warehouse or multiple locations, hired an employee or two, have taken the next step and opened a few more sites, or even started manufacturing some of their own products.

In addition to getting their financial records in order, they will be adding some software and will be faced with integration and training employees. It is a large time commitment, but they know they 'need' to take this step; and you need to guide them to make it as seamless as possible. There are some store owners that need a full-blown order manager to take their business to the next level; others may be able to do that with the addition of a tool that imports orders only.

An Order Importer or Order Manager ...

There are store owners that will never graduate to a full-blown OM, and that's fine. There are others that really need a OM but don't quite 'feel ready' ... so I may recommend a tool that helps them become more efficient and become comfortable with automation now; realizing that the next logical step would be to upgrade to a full Order Manager. This can be tricky, because you don't want to waste their time and resources.

My goal is to provide the best solution to each client, offer them alternatives when they are available, and help them make the best decision based on their comfort level and overall business model. No one

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product will be right for everyone, but there are some nice alternatives, and as the client grows they will stay or move into programs that understand eCommerce and, in my case, Yahoo in general.

For years I have strongly felt there was a gap in the market of available products for YStore owners. I've used almost all of the ones available and, either have a copy or support the set-up/integration between them and QuickBooks. An **Order Importer** can be as simple as a program that brings the web orders down from Yahoo and into QuickBooks, updating their Sale, Customer, Product, and Inventory information. An **Order Manager** handles all of the Sale and Customer information within its own program; posting summary information only into QuickBooks; similar to how a POS system works. They are quite different in how they work and the features available.

The 'Levels' ...

So let's break down what I've found over the past 7-8 years:

1) **Intro Level** – The clients either do everything manually or deal with the Yahoo .iif export/import, which is ugly and time-consuming. The best I can suggest is that their items in QuickBooks match their store item ID's (which is not always possible when dealing with sub-skus and/or options). They will use the .iif export function and have to manually link the transactions (as they come in as an Invoice and Receipt, with the link broken) and review certain reports on a regular basis. Phantom accounts and items will be made in QuickBooks' and inaccurate information is a regular occurrence.

2) **Intro - Med Level** – The clients need to get their orders in correctly...easily and cost effectively...This option has not been readily available until recently. They don't need a full OM yet, or don't understand them, or just do not feel ready. It has been difficult to find a developer to commit to a solution that offered an easy interface, at a good price, with proper support, and the ability for the client to grow with the program. I wanted, and needed, options to recommend... and there are finally choices available to the store owners that fall into these first two categories.

{We will be focusing on the Intro to Mid-Level market in this issue; there are a few great choices that will be outlined.}

3) **Med Level** - They select from the few Order Managers that are available which offers a good product, good support, and *understand Yahoo and eCommerce*. I only recommend a few, and again, it depends on where they are and what they may already use. You may think I'm a bit 'picky' about all of this; and you would be right, I am! ***We will discuss the programs that fall into this category next month.***

4) **Higher Level** – The choice here is pretty cut and dry at the moment; StoneEdge... a great product, a lot of features, functionality is constantly being added, and great customer support. The learning curve is higher, and the interface is a bit more difficult. However, it is not meant, or geared towards, the low to mid level user. It offers POS features, and is very robust overall; it is totally geared for eCommerce and eCommerce clients who move to, or add, B&M locations. In my opinion, it is absolutely one of the best products around for users who have outgrown a typical OM. I recommend it all the time for clients who fall into this specific category. ***We will be looking at this program in detail in June.***

5) **Higher Level/Web Based** – Cactus Commerce Complete or StoneEdge Enterprise. Expensive but robust and is geared for those that want/need a web-based solution. I recommend it to those that have these specific needs; it is not a solution for the 'broad' market....it has its own type of market niche. ***We will be looking at these in June as well.***

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