



This article has been contributed by Roxanne Brown, CQA – Professional Business Solutions 4U, LLC & Managing Editor, and IDNAC Newsletter **August, 2006**

The Mid/High Level Order Manager for eCommerce *StoneEdge Order Manager*

Over the last few months we have reviewed several Order Importers and Order Managers. This month we are going to take a closer look at a very popular and robust Order Manager for users who require a higher level of automation and functionality for eCommerce.

The last several years I have watched the developers of **StoneEdge Order Manager** (www.stoneedge.com) grow their program into one of a kind; combining an affordable price with an enormous feature set and scalability. So why am I so impressed? Let's take a look.

Overview ★★★★★

The **Stone Edge Order Manager (SEOM)** is geared specifically for the often '*forgotten*' market of small to medium eCommerce merchants. SEOM was initially introduced in 2000 as a relatively simple system to be used for importing orders from various shopping carts, as well as manage invoices and packing slips. Just a few years later it has become so much more; and it continues to improve – giving the business owner the much needed tools to become automated, efficient, and profitable. The best part, they continue to add features and flexibility based on user feedback; which they take very seriously.

The company focuses on Internet retailers, however, they also have a POS system; allowing the software to grow with the business. If the client processes 10 or 2,000 orders a day, this is a system worth looking into. Several other products are offered that can be added when needed as the business grows. They also have an Enterprise version for those that outgrow the regular system altogether.

SEOM becomes a complete 'back end' system for the day to day operations by automating daily processes and procedures; increasing efficiency – providing the business owner with the tools, and therefore the time, to focus on their growing their business. Visit their shopping cart matrix for details on cart integration <http://www.stoneedge.com/cartmatrix.htm>.

With the **Stone Edge Order Manager**, you can easily:

- Import orders directly from most popular shopping carts – Such as: Amazon, Miva, MonsterEcommerce, Shopsyte, Yahoo, and many more
- Import orders from custom shopping cart systems (requires a custom script)
- Manually enter orders received via phone, fax, regular mail, or email
- Use a point-of-sale system for orders from walk-in customers
- Process credit card payments
- Print invoices, packing slips, pick slips and shipping labels
- Manage customer information
- Track your inventory, allowing real-time synchronization
- Transmit orders to drop shippers and fulfillment centers
- Send email messages to customers and suppliers
- Generate purchase orders, then print, email or fax to your suppliers
- Generate and print standard and custom reports

Let's See What Else SEOM Can Do –

Order Processing – From Beginning to End:

- Download and import orders from many popular shopping cart systems
<http://www.stoneedge.com/cartmatrix.htm>
- Print order summaries, pick lists, invoices, packing slips, and shipping labels
- Send confirmation emails to customers
- Modify orders easily: change quantity or SKU, add or delete line items, adjust shipping charges or sales tax, etc.
- Capture pre-approved credit card payments automatically
- Virtual Credit Card Terminal for entering charges and credits
- Scan items as they are packed - eliminating packing errors (you can even view images, eliminating packing errors even further)
- Automatically create files for sending to fulfillment centers
- Drop-Ship system to send orders to drop-shippers
- Fields for ship dates, tracking numbers, status codes, notes, etc.
- Handle returns & exchanges
- RMA system for tracking returns
- Exports sales, deposit and purchase order data to QuickBooks
- Real-time Order Delivery (<http://www.stoneedge.com/yahooorderlink.htm>)

Fulfillment

- Streamline the process of placing orders with fulfillment centers, whether they are company-owned or independent contractors
- Create “fulfillment centers”
- Assign products to fulfillment centers individually or by category, great for detailed reports
- Send orders to fulfillment centers via email or text files
- Text files and email messages are based on user-definable templates – different formats can be used for each fulfillment center
- Support orders that include items that must be ordered from different fulfillment centers
- **COMING SOON:** Web-based fulfillment system. Automatically transmit orders to fulfillment centers and import shipping and tracking data back into the Order Manager. Fulfillment centers will be able to use their own copy of the Order Manager, or a Web-based system.

Drop Shipping

There is full control over how drop shipments are handled, by specifying which products get drop shipped and which vendors you get each product from – **SEOM** can easily automate numerous drop ship purchase orders for each order and each vendor. If a product that you normally ship from your stock is not available, simply revise the item ordered to be drop shipped... once that is done let the Order Manager automatically generate the purchase order.

SEOM can be configured for how each supplier wants to receive drop-ship notices: email, fax, mail, etc. The system can automatically generate a unique purchase order for each vendor and send them based on the criteria established for that vendor.

Manual Order Entry – Pulls items from same Inventory

- Fast data entry for all non-Web orders, enter notes and other valuable information
- Search for customers by name, address, email, phone, etc. - fills in name & address fields automatically
- Enter gift messages and other notes for printing on invoices and packing slips
- Enter price changes, discounts, surcharges, shipping charges, etc.

Point of Sale – (Note: This is undergoing an over haul to include more features in the next month)

The current system includes a basic POS set-up that integrates with the rest of SEOM (less hardware, which is a separate purchase), and many have been using it quite successfully. However, they are currently in Beta with a revised version which will add the same functionality and features we have come to rely upon with this program. The initial reports are looking good, I've had a chance to see it up close and look forward to the final release.

Inventory Management

- Subtract items sold from quantity on hand
- Combine sales from all sales channels (web, POS, manual)
- Track and fill backorders
- Support drop-shipping
- Real-time inventory tracking for Yahoo!Store, Miva Merchant & AbleCommerce (<http://www.stoneedge.com/realtimeinventorylink.htm>)
- RMA system for tracking returns
- Option to track cost-of-goods on a first-in-first-out (FIFO) basis – *Note: Does not support LIFO*
- Supports barcode scanners for receiving inventory and packing orders
- Create restocking purchase orders automatically
- Import and export product data via text files and Access databases
- Real-time Order Status for Website

Track inventory by product options (attributes) such as color, size and style.

When you import orders into the Order Manager, the program combines "parent SKUs" with selected options (color, size, etc.) to generate "sub SKUs". It then uses the sub SKUs for inventory tracking, purchase orders, etc. For example, if someone orders a T-shirt (SKU 1001) in red and extra large, the Order Manager converts the SKU 1001 to 1001-Red-XL.

Purchasing

- Products can have one or more suppliers, with one supplier being designated as the primary supplier for that product
- In addition to your own SKUs (unique part numbers), each supplier can have their own SKUs, costs and purchasing rules for each product
- Set reorder points and reorder quantities
- Generate purchase orders automatically based on reorder points and reorder quantities, or order enough for a given number of days based on sales during a specified period
- Automatically send purchase orders by email or fax
- Bar-coded items can be received with a barcode scanner
- Print barcode labels for newly received items
- Export payables for received items to QuickBooks – ***This is an Awesome Feature ☺***

Customer Management

- Builds a searchable customer list as orders are imported/entered – Can search on most fields
- Track customers' order and payment history
- Carry balances and credits forward to new orders
- Enter Notes about customers & Flag Problem customers
- Send email confirmations for new orders, when tracking numbers are imported, etc.
- Powerful Email Template system for sending pre-formatted messages
- Order Status System lets customers get up-to-the-minute status and tracking info on your Website*
- Exports customer data for use with bulk email programs, such as Constant Contact; making it very easy to run efficient e-mail campaigns to a target customer base

* Separate hosting fee required

Packing & Shipping

The Pack and Ship System streamlines the process of packing and shipping orders:

- Scan the order number of an invoice
- Put an empty box on your scale
- Scan each item as you pack it
- Print a UPS, FedEx or USPS label

Using the Pack and Ship System:

- Pack by order or SKU
- Collect serial numbers for specified items as they are packed
- Set-aside partially packed orders and retrieve them for completion at a later date
- Charge credit cards for orders that have not been paid yet
- Print invoices and packing slips
- Print shipping labels without going through the packing process
- Review recent UPS and FedEx shipments
- Run UPS and FedEx end-of-day processes

Shipping Software Integration

Exchange data with most shipping programs, including:

- UPS Online Worldship
- FedEx QuickShip
- Endicia/DAZzle
- Postal Package Printer
- Virtually any shipping program that imports & exports text files
- Send addresses to shipping software via text files or ODBC connection
- Automatically import tracking numbers, pickup dates & shipping charges from programs listed above
- Imports tracking numbers, pickup dates & shipping charges from comma delimited text files

USPS Interface

- Delivery Confirmation Numbers from the US Postal Service
- Print USPS shipping labels with Delivery Confirmation barcodes

Includes many order tracking features

- Packages can be tracked from the View Orders screen in the Order Manager
- Tracking numbers can be used in emails to customers
- Customer emails can be sent automatically when new tracking numbers are imported
- Tracking numbers can also be displayed as live links to UPS, FedEx, USPS, etc. in the Stone Edge Order Status System

Credit Card Processing

SEOM allows the use of an existing credit card payment gateway with integrated virtual credit card terminal. Many merchants opt to pre-authorize credit cards on the website, and then capture those funds when preparing to ship the products. Other payment scenarios might include capturing payments in your shopping cart, then using the Order Manager to process any credits or additional charges or doing nothing with the payment online and letting the Order Manager handle all of your credit card processing.

Built in Reports

- Most reports let you select date ranges, product categories, sorting options, detailed vs. summary reports, etc.
- Some reports have different standard versions that can be selected
- Many reports have "system parameters" that let you do limited customization very easily
- Any standard report can be replaced with a customized version
- You can create your own customized reports using Microsoft Access' report generator

QuickBooks Integration via SDK

Now this is where it gets interesting ... well for me ☺

SEOM handles all the details of every thing we have reviewed thus far; the user then simply clicks a button and sends summary information for Sales and Deposits directly to QuickBooks. Additionally, all Purchase Order and Invoicing can also be transferred, either at the same time, or separately if preferred. By transferring the PO and Invoicing information, inventory will be adjusted accordingly and you will be able to pay your vendors through the regular 'pay bills' feature in QuickBooks.

As with any program, you will need to set up a few specific accounts in QuickBooks, configure a few settings in **SEOM**, and map the fields between the two. Once this is set-up, the day to day process is quick and easy; posting the information a business owner requires, without posting all the 'stuff' that does not belong in QuickBooks. *It's a good idea to always do the first 'test' export/import on back-up files, NOT the live data!*

Sales information is exported as Journal Entries. It can be exported summarized by day and account, or with full details – however there is only one journal entry per day, whichever setting you select. The entry includes sales, sales taxes, shipping charges, discounts, surcharges, coupons and cost of goods sold. Items can be assigned to sales accounts individually, by inventory category, by a system-wide default sales account or any combination of those methods with the correct set-up.

Deposit Data will include any Order Manager transactions, which are created any time a payment is received or a credit issued. Payments received are exported as deposits, and are summarized by date and payment method, with an option to combine Visa and MasterCard payments. Credits issued are exported as individual checks or can be rolled up into the deposit for the day (providing the deposit will not become negative). You decide which payment methods should be exported, and to which QuickBooks accounts. Each payment method can have a number of "delay days" set if you prefer and you can set a cutoff time, so that payments received after that time of day are assumed to come in the following day.

Purchase Order and Vendor Invoices can also be sent from **SEOM** to QuickBooks easily, allowing the user to pay their bills through the typical 'pay bills' feature they are comfortable with. Once **SEOM** and QuickBooks are configured correctly, SEOM can record adjustments to an inventory value account and a liability account at the same time your post the products received on the purchase order. Note I said Liability account; as these items have been received, but the store owner has not actually received a bill for it yet; you are export 'Receiving' information only. After the invoice is received from the Vendor, they update **SEOM** accordingly and the next export will move the information posted to the Liability account and create the vendor Bills in QuickBooks (using Accounts Payable) with all the necessary information.

NOTE: It is important to understand that at this time **SEOM** does NOT record inventory adjustments or receiving history if the user has used improper procedures in the OM. Manually entered inventory adjustments or receiving information using certain screens in SEOM will require the user to also manually make these adjustments in QuickBooks. Additionally, each product must be assigned a default supplier and the QuickBooks Vendor name should be verified to avoid duplicated list information.

As with any other program that is sending information to QuickBooks, it is *imperative* that the user take time to review all settings and configurations in **both** programs. Additionally, all information should be reviewed for accuracy once it has been imported to QuickBooks before importing a ton of information. When the information posted is incorrect, review the settings and almost as important, review the procedures the client is using. If they are using **SEOM** incorrectly, then you will see the affects in the numbers. Remember – 'Garbage In, Garbage Out' – the same holds true here. If only half of the set-up was completed correctly, there is no change the information will be useful once it is posted to QuickBooks.

In Conclusion

Stone Edge Order Manager offers big company capabilities at an affordable price. Many clients have been amazed at how much time they are saving once they have converted. Many have been able to substantially grow their business without hiring additional employees because they have become so much more efficient. However, you must realize that if your client is going to move to this system (or any other major system change); they are completely changing their normal procedures in just about every aspect.

The overall transition is **not** a one or two day job, it takes some pre-planning on the part of you and the client, and it takes patience on their end. It does come with a learning curve, which will depend on how much they have done beforehand, how many employees are working in the system, how many hours they can commit to the project, the number of sales channels involved, how complex their set-up, if they are using additional products (<http://www.stoneedge.com/products.htm>) etc. It is also important to remember that the information now housed in QuickBooks will look quite different than before, since they no longer have customer and item/inventory information managed there; however reconciling the numbers and bank accounts is a breeze one you understand how the process works.

The program is written using Microsoft Access; however, it is not necessary to know how to use Access to use this program (although it can be helpful). There are certain procedures that need to be completed in the proper sequence to avoid problems later down the road, so take advantage of their Express Set-up <http://www.stoneedge.com/orderpage.htm> (I would say this is a must, and well worth the money).

StoneEdge has a great website full of information, an on-line knowledge base (<http://www.stoneedge.com/help/>), and a very active user forum (<http://www.stoneedge.net/forum>); all a big plus. They also offer periodic User Conferences, both on the East and West Coast. I have attended the conference in Philadelphia the last two years and found it to be quite informative and I am still somewhat surprised at just how much they value the feedback of their users.

Their support staff is top notch and the company is always striving to make the program better and better. It is truly one of the best values around. The program was built with the eCommerce merchant as first priority; this is probably one the main reasons that **SEOM** seems to really 'get' the life of an eTailer.

We hope you have found the series on eCommerce helpful. We would love to hear from Developers who have any programs that may be useful to the eCommerce client or ProAdvisors who may have worked with other programs they have found helpful. As the various programs we have discussed the past few months add features, we will be keeping you updated.

Until next month...

Rox ☺