



Core omnichannel capabilities are supported by robust ERP systems. The tenants of allowing customers to “buy anywhere, receive goods anywhere, and return/exchange anywhere” are fostered via a unified back-end platform that centralizes order management, efficient fulfillment, and customer behavior insights.

Centralized Order Management

Merchants serving consumers must provide a consistent buying experience whether customers are in-store, online, or calling in orders. Synchronization across sales channels is critical for effective selling.

EFFECTIVE ORDER CAPTURE		CONNECTED SALES CHANNELS		KEY USER ROLES
<p>Physical Inventory</p> <p>Consolidate inventory counts across warehouses and shelf locations, set rules for partial shipments, and allocate stock to buyers' orders in real-time.</p>	<p>Order Handling</p> <p>Expedite checkout online and self-checkout in-store. Enable mobile scanning devices. Minimize online cart abandonment with embedded tax and shipping data.</p>	<p>Commerce Connectors</p> <p>Integrate webstores and marketplaces with back-end databases for bi-directional data flows on items, orders, prices, and customers.</p>	<p>Point-of-Sale Devices</p> <p>Connect in-store POS devices with the ERP platform to capture sales, inventory, financials, and customer data. Offer customer loyalty discounts.</p>	<p>Sales Manager eCommerce Director</p> <p>Set sales strategies and evaluate the effectiveness of current sales programs. Suggest item alternates to delight clients and raise sales.</p>

Efficient Order Fulfillment

Strive for high perfect order rates regardless of sales channel and provide flexible delivery of products based on customer preferences. Keep buyers informed of delivery dates, and train staff on core processes.

MEET BUYER EXPECTATIONS		TRAIN STAFF ON FULFILLMENT		KEY USER ROLES
<p>Perfect Order Rates</p> <p>Use system workflows and approvals with support for picking, packing, and shipping. Dashboards and exception reporting allow employees to resolve issues immediately.</p>	<p>Delivery Flexibility</p> <p>Flag orders based on requested delivery type (e.g., BOPIS, Ship from Store, Curbside). CRM communications inform customers when their order is ready.</p>	<p>Document Management</p> <p>Document management and wiki pages store work instructions. Forums enable knowledge-sharing and list important details of job functions.</p>	<p>System Usability</p> <p>ERP usability enhances staff engagement with the software, accelerating learning and proficiency.</p>	<p>COO General Manager</p> <p>Manage supply chain and warehouse resources. Supervise daily distribution center activities. Manage labor resources and conflicts. Develop operational budgets and operational plans.</p>

Personalized Customer Relationship Management

Delight customers with excellent post-sales service, discounts and promotions, and product recommendations.

CASE MANAGEMENT		PERSONALIZATION		KEY USER ROLES
<p>Customer Communication</p> <p>A robust CRM system to facilitate customer communication via email and SMS. Solicit reviews and suggestions from top customers.</p>	<p>Customer Service</p> <p>Keep all customer data available to employees for expedient, individual service of each customer. CRM tied to customer orders and payments simplifies service tasks.</p>	<p>Mobile Application</p> <p>Mobile applications can automatically send coupons to consumers. Notify customers of new and limited time offers.</p>	<p>Customer History</p> <p>CRM tracks consumer behavior and purchases, allowing for item substitutions with cross-sell and up-sell opportunities.</p>	<p>VP, Services Service Manager</p> <p>Oversee the service strategy and execution. Build revenue and profitability forecasts for service lines. Serve as the escalation point for critical customer issues.</p>



Omnichannel has applicability across various selling models, including business-to-consumer (B2C), business-to-business (B2B), and direct-to-consumer (D2C). Each sales model possesses unique traits needed to satisfy customer demands and promote a mutually beneficial engagement experience for buyer and seller.

Business to Consumer (B2C) Sales

Consumers expect personalization and convenience, including rewards for being dedicated to certain brands. They demand services are available regardless of which sales channel(s) they buy, receive, or return goods.

CONVENIENCE
Gift Cards
Make gift cards available, transferrable, and redeemable whether online or in-store. Track gift card balances online or at POS stations.

REWARDS
Loyalty Programs
Reward the best and most profitable customers with perks and loyalty benefits such as price discounts, cash back, priority service, and free shipping.

PERSONALIZATION
Mass Customization
Consumers can personalize purchases with engraving, artwork, or other custom additions. Send coupons to mobile devices based on a customer's prior buying habits.

Business to Business (B2B) Sales

Company buyers require engagement at the business level rather than as an individual consumer. Customer-specific pricing, with a customer hierarchy for buyers, and clear payment terms and financing, are essential.

CONVENIENCE
Customer Hierarchy
Allow multiple buyers across corporate locations to order, receive, and return goods on behalf of the company. Organize customers by company and then by individual buyer.

FLEXIBILITY
Payment Terms
Establish credit terms for each corporate customer, based on credit risk, order volumes, and other factors. Track receivables and late payments with reports and custom dashboards.

PERSONALIZATION
Specific Pricing
Build relationships and enhance sales with customer-specific pricing strategies. Segment corporate customers into price classes based on profitability, lifetime value, or other KPI metrics.

Direct to Consumer (D2C) Sales

Producers who sell directly to consumers must connect with buyers while maintaining efficient operations.

VERTICAL INTEGRATION
Manufacturing Support
Combine manufacturing, distribution, and sales operations to effectively design, build, distribute, and sell goods in a vertically integrated operating model.

REWARDS
Loyalty Programs
Reward the best and most profitable customers. Encourage advocacy of your brand via social media related public forums.

PERSONALIZATION
Consumer Relationships
Leverage embedded CRM tools to communicate directly with consumers using digital marketing. Foster brand equity and affinity.



The Acumatica [Retail Evaluation Checklist](#) provides a high-level overview of major features required by B2C, B2B, and D2C sellers. The table below highlights specialized features for merchants.

FEATURE	BENEFIT	PRIORITY	Acumatica		
Forecasts	Manage demand forecasts with sales forecasting and native replenishment or connected statistical forecasting apps.		✓		
Omnichannel Commerce	Manage sales, returns, and exchanges online, in-store, or in-house with native commerce connectors and point-of-sale apps.		✓		
Embedded CRM	Gain a 360-degree view of customer relationships and transactions with embedded marketing automation and sales workflows.		✓		
Retail Support	Deploy innovative pricing offers and promotions, launch loyalty programs, capture POS transactions, and build brand loyalty with your customer base.		✓		
Order Management	Create and manage sales orders, check inventory availability, perform credit checks, pick, ship, invoice, and collect payment.		✓		
eCommerce Connectors	Link online orders to your ERP and CRM. Track all sales, manage inventory in real-time, provide delivery dates and order tracking, and collect the proper sales tax across multiple states and geographies.		✓		
Financial Management	Perform standard accounting functions, including general ledger, accounts payable, accounts receivable, cash management, and tax management.		✓		
Inventory	Streamline inventory across multiple warehouses with perpetual inventory, replenishment, physical inventory, lot and serial tracking, matrix items, and kitting.		✓		
Warehouse Management	Automate warehouse transactions with native WMS including paperless wave and batch picking, prioritized picking queues, packing, and connected shipping apps.		✓		
Support and Customer Portals	Thrill customers with native support cases and customer self-service portals.		✓		
Reports and Inquiries	Access hundreds of standard reports or tailor your reports and inquiries with low-code and no-code analytical tools.		✓		
Dashboards	Leverage role-based dashboards with real-time insights and actionable drill-downs to source transactions.		✓		
Notifications	Set up business events for automated alerts to employees, vendors, or customers based on data inside the ERP application.		✓		
Mobility	Empower employees and consumers with mobile access from any mobile device.		✓		
Agility	Build your business on a modern cloud platform with an intuitive user interface, open APIs, and hundreds of connected marketplace applications for optimum flexibility.		✓		

About The Answer Company

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