Multi-Channel Retail
Order Management System Evaluation Checklist

Selecting a new OMS is challenging. Let us help you gather essential requirements, comparing features & functions across multiple vendors. Your OMS is the heart of your retail business operations, it can be an investment impacting your business for years to come.

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Use this interactive checklist to create an RFP with your criteria for vendor evaluations & comparisons.

Retail Industry Functionality

Retail Industry Functionality: Order Management

Feature/Benefit	Priority	Ability CSS	
B2C, B2B, D2C order processing automation built for retail industry Designed with features needed by the retail industry for increased productivity.		✔	
Single customer database for multi-channel order processing Ecommerce, phone, POS, marketplace, and catalog customer order hub all in one place for multi-channel commerce speed and accuracy.		✔	
Inventory - integrated real-time visibility Hard allocation allows for up-to-date inventory availability to never disappoint a customer.		✔	
Quotes Create and email quotes to Customers. Easily convert quote to sales order.		✔	
Flexible shipment options with customizable fulfillment prioritization Ship complete; partials, packing slip print queues for shipment prioritization.		✔	
Dropship order processing Electronically send drop ship orders to vendors with ability to receive shipment confirmations back.		✔	
Flexible shipping charge calculations Shipping charge calculation based on Ship Method; based on graduated dollar scale or actual weight.		✔	
Backorder reallocation Shift committed ATP inventory from one customer to another.		✔	
Backorder FTC Notices FTC notices for merchandise that is in prepaid status (Check order, Cash Order, Money Order, etc.)		✔	

Feature/Benefit	Priority	Ability CSS	
Easy 3rd Party Order Imports Import orders from various 3rd party sellers for fulfillment.		✔	
Built-in Fraud Order Holds Allows orders to be flagged as possible fraud based on pre-defined criteria.		✔	

Retail Industry Functionality: Inventory Management

Feature/Benefit	Priority	Ability CSS	
Real-time inventory visibility and adjustments Complete picture of your inventory across sales channel to react quickly and accurately to supply chain needs.		✔	
Simplified item creation Easy item setup with bulk upload capability.		✔	
Support for large volume of SKUs OMS can easily handle SKU growth.		✔	
User defined fields OMS allows you to create your own fields to capture information specific to your business.		✔	
Item / Styles / Kits / Units of measure 3 dimensional styles, static & variable kits; units of measure (master case pack, inner pack, etc.).		✔	
Item Personalization Robust, made easy with templates to define endless item attributes including font type, ink color, fabric color, logo/image, multiple pricing options.		✔	
Serial number tracking by item Each item will be assigned a unique identification code to help you know which item was sold to whom.		✔	
Support for multiple divisions of inventory Fulfillable from multiple warehouse locations, simplifies complex inventory handling.		✔	
Bill of materials processing Assembly, disassembly & cost tracking.		✔	
Vendor management Primary vendor and alternative vendor assignments; minimum order quantities and/or minimum dollars by vendor. Set max discount limits per item to control margins.		✔	
Easy purchasing Specific purchasing & receiving fields and one click access to purchase inquiry.		✔	
Upsell, cross-sell, alternative items Ability to define upsells, cross-sells and alternatives for each item to empower your customer service representatives and in-store POS sales associates to uncover more sales and elevate customer experiences.		✔	
Automated purchase order reconciliation Eliminate need to rely on paperwork for processing inventory receipts. Automatically apply Vendor Discounts to PO's.		✔	

Retail Industry Functionality: Warehouse Management

Feature/Benefit	Priority	Ability CSS	
Order fulfillment, inventory receiving & movement automation Pick/pack/ship, receive, adjust & move physical inventory and cycle counts within your warehouse.		✔	
Stocking Recording of warehouse, zone, aisle, row, bin locations for all items.		✔	
RF barcode scanning Wireless handheld device support to streamline warehouse operations (paperless picking, verification of picked items, receiving, put away).		✔	
Multiple shipping system integration FedEx, USPS, UPS, etc.		✔	
Configurable picking options Custom print queues based on a broad range of criteria (e.g. Rush; Ship Method; Backorders; Cart Type; Single/Multi Line; Warehouse location/zone; user definable).		✔	
Order tracking To confirm that all orders printed have been completed.		✔	
Virtual warehouses within the same physical building QC Hold, Ready for return to stock, etc.		✔	
Warehouse activity audit trail Track all warehouse activities and item location status by warehouse, business channel, location, individual, or item.		✔	
Labels Generate both location and price labels for the same SKU.		✔	
Pack verification option Scan items (or manually enter) as you pack them to verify that each shipment includes the correct items in the correct quantities.		✔	
Warehouse function processing flexibility Batch and real time processing available for all warehouse functions.		✔	

Retail Industry Functionality: CRM

Feature/Benefit	Priority	Ability CSS	
Up-to-date customer order history Maximized customer satisfaction with real time, multi-channel customer history.		✔	
Multi-channel Returns/Refunds Regardless of where the customer made the purchase, the OMS can handle returns/refunds.		✔	
Customer Management Robust system to create and manage your company's relationships with existing customers and potential customers.		✔	
Customer Credit Management Easily assign and manage credit terms, credit slips, balance dues.		✔	

Retail Industry Functionality: Point-of-Sale

Feature/Benefit	Priority	Ability CSS	
Customer look-ups, pricing, promotions, xchannel inventory real-time updates Centralized customer, order, inventory & order management for a 360° customer view across sales channels.		✔	
Product images on POS display Item identification for your in-store sales associates.		✔	
Gift cards Allow your customers to easily purchase and apply gift cards for in-store transactions.		✔	
Simplified brick & mortar store replenishment Store can be easily replenished from your warehouse.		✔	
Partial Payments Flexible customer payment options.		✔	
Start and end of day processes Automation of standard in-store sales administrative tasks.		✔	
Pick-up options In-store and curbside.		✔	
Flexible secure payment Integrated with popular payment processors.		✔	
EMV Enabling more secure card-present transactions, PCI 5.X-certified device. ★ via 3rd party native integration with Verifone.		✔ ★	

Retail Industry Functionality: Credit Card Processing

Feature/Benefit	Priority	Ability CSS	
Integrated , secure payment processing Securely accept customer payments via credit card directly within your OMS, processed by industry leading payment processors.		✔	
Tokenization Tokenized payments where the PAN is not transmitted during the transaction, making the payment more secure.		✔	

Retail Industry Functionality: Tax Management

Feature/Benefit	Priority	Ability CSS	
Tax calculation Automated determination/calculation of the applicable sales tax rate based on product and service taxability. ★ via 3rd party application subscription (e.g. TaxCloud native integration) or other tax software		✔ ★	
Tax filing Automated file returns and remittance of your collected sales tax proceeds to the appropriate state and local jurisdictions.		✔ ★	

Feature/Benefit		Priority	Ability CSS	
★ via 3rd party application subscription (e.g. TaxCloud native integration) or other tax software				
Tax exempt document archival Archive your customer's tax exempt electronic documents within your OMS.			✔	

Retail Industry Functionality: Accounting

Feature/Benefit	Priority	Ability CSS	
Financial management Generates accounting transactions in support of sales, including General Ledger, Accounts Payable, Accounts Receivables.		✔	
Accounts Receivable capabilities, accounts Generates invoices, send statements, collect and apply payments, verify balances.		✔	
Refund processing OMS to be able to generate refund checks and credit slips.		✔	
Invoice approval automation Eliminated paperwork to match-up invoices to inventory received through automation.		✔	
Freedom to use the financials software of your choice Ease of export of accounting transactions to your preferred financials software.		✔	
Lockbox Remittance Processing Allows for payments received by your bank to be uploaded to your OMS automatically.		✔	
Accounts Receivable Management Accounts receivable ledger card and ease of accounts receivable processing.		✔	

Retail Industry Functionality: Marketing

Feature/Benefit	Priority	Ability CSS	
Promotional pricing, price list management, campaign source codes Ability- to manage multiple price lists, offer promotional pricing, customer and item discounts, track campaign effectiveness across sales channels.		✔	
Customer segmentation Ability to group customers for targeted marketing.		✔	

Retail Industry Functionality: Reporting

Feature/Benefit	Priority	Ability CSS	
Standard retail direct commerce reports out-of-the-box OMS solution that has direct commerce industry reports vs. needing to create from scratch.		✔	
Customization using industry standard reporting tool Ability to modify existing report, create new reports easily, rapidly.		✔	
Scheduled and electronic distribution		✔	

Simplified reporting availability.			

Retail Industry Functionality: Data Import/Export

Feature/Benefit	Priority	Ability CSS	
Easy way to get data in/out Access to utility for easy data import and export.		✓	

Retail Industry Functionality: Multi-Division

Feature/Benefit	Priority	Ability CSS	
Multiple divisions General Ledger separated by Division to allow multi-company. Allows multi-divison with shared inventory.		✓	

Retail Industry Functionality: Access Privileges

Feature/Benefit	Priority	Ability CSS	
Assign/Revoke access privileges Set access privileges by user and role including a date range for all your users.		✓	

Retail Industry Functionality: User Interface (UI)

Feature/Benefit	Priority	Ability CSS	
Ease of Use, mobile enabled User productivity with intuitive workflow and minimal clicks, easy to learn and use with modern, real-time data dashboards.		✓	

Retail Industry Functionality: Commerce Connectors

Feature/Benefit	Priority	Ability CSS	
Pre-built native integration to leading 3rd party ecommerce platforms For seamless, fast deployment and post-go-live vendor support. ★ CCS offers native integrations with Ecommerce apps (BigCommerce, Shopify underway), Tax apps (TaxCloud), Marketplace (Amazon).		✓ ★	

Technology | Infrastructure

Technology | Infrastructure: Secure Cloud Hosting

Feature/Benefit	Priority	Ability CSS	
Access data anywhere, anytime Accessible through the internet using a standard browser to provide a complete real-time view of your business anytime, anywhere, on any device.		✔	
Retail OMS platform scalability Cloud platform scalability to seamlessly and cost-effectively handle increased workloads.		✔	
Backup & Disaster Recovery Cloud backup and disaster recovery you can trust.		✔	
First-rate cloud security features OMS leverages data security from industry leading cloud services provider (e.g. Microsoft Azure), to decrease data attack vulnerability.		✔	
Regulatory Compliance Solution utilizes Azure infrastructure, which meets PCI & SOC-2 Compliance requirements. Additionally, the OMS payment application is approved by a QSA and the listing is published in the PCI Security Standards Council site, following the new PCI SSF (Software Secure Framework) requirements.		✔	
PII Compliance For PII (Personal Identifiable Information) compliance the solution adheres to GDPR, CCPA & all other regulations for PII. This includes encryption of data, data during transmission, and data at rest.		✔	

Technology | Infrastructure: On-Premise or Cloud Hosting Options

Feature/Benefit	Priority	Ability CSS	
Deploy on-premise with your own private network, self manage Option for hosting yourself (or your contracted hosting provider) for self-management, an on-premise subscription license offered by vendor to pay as you go instead of making an initial software investment.		✔	
Cloud Hosting Host in vendor's cloud or yours.		✔	

Technology | Infrastructure: Interoperability

Feature/Benefit	Priority	Ability CSS	
Published APIs Simplifies integration between your OMS and 3rd party software (e.g. marketplaces, 3PLs and more).		✔	

Technology | Infrastructure: Customizable

Feature/Benefit	Priority	Ability CSS	
Accommodation of retailer-specific functionality Vendor's ability to modify existing and/or add OMS functionality to meet your company's unique requirements without releasing one-off versions which can be pricey and not easily maintainable by vendor.		✔	

Services

Services: Implementation

Feature/Benefit	Priority	Ability CSS	
Implementation support matching your business size needs For smaller OMS deployments, one-click installations, install yourself with vendor's user guide. For larger custom deployments, access to vendor's In-house team of retail industry professionals including project managers, business analysts, data conversion professionals, software installers, trainers.		✔	
Data conversion Access to vendor's professional services for assistance on importing complex data into your new OMS.		✔	

Services: Software Upgrades

Feature/Benefit	Priority	Ability CSS	
Quality & Innovation Access to vendor's software quality advancements, new features and functionality, security updates to keep you safe from cyber attacks.		✔	

Services: User Education

Feature/Benefit	Priority	Ability CSS	
Online Documentation Vendor supplied online documentation to walk you through OMS features and functions on an ongoing basis.		✔	
Training Access to vendor's training for personalized training including videos for user on demand use. Custom training if you need it.		✔	

Services: Support

Feature/Benefit	Priority	Ability CSS	
Post Go-live support Access to after the sale support options from your vendor should you need it.		✔	

Services: Managed Cloud Hosting

Feature/Benefit	Priority	Ability CSS	
Right-sized cloud hosting service For smaller OMS deployments, vendor managed cloud hosting and for larger OMS deployments, option for self managed or vendor managed cloud hosting.		✔	

Value

Value: Total Cost of Ownership (TCO)

Feature/Benefit	Priority	Ability CSS	
Budget-friendly monthly costs A vendor offering levels of monthly subscription plans with clear scope of service support.		✔	

Value: Speed of Time to Value

Feature/Benefit	Priority	Ability CSS	
Speedy implementation Smaller, starter implementations with 1-click install, more advanced implementations weeks to months to implement, not years.		✔	

Value: Vendor Viability

Feature/Benefit	Priority	Ability CSS	
Proven provider Many years of experience in providing and delivering software solutions for direct sales.		✔	
Retail industry experts Primary focus on retail industry best practice automation.		✔	
Retail industry client references Reduced risk knowing vendor has longstanding trusted partnerships with retail clients.		✔	

To find out how Ability Commerce can meet your specific requirements, to see a demo, or to request more information, please contact us! We will schedule a convenient time to answer your questions and to walk you through our features and benefits.

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