

State of the Order Management Systems Landscape

Ernie Schell. Director
Marketing Systems Analysis
ernie@schell.com

Operations Summit
Memphis, TN
May 2-3, 2012

My Background



- Editor, Target Marketing magazine, 1981-83
- First person to review integrated Order Management and Fulfillment Systems (Catalog Age magazine, 1986)
- Published “Guide to Catalog Management Systems” 1987 – 2005
- Currently produce annual systems “Round-up” summaries for Multichannel Merchant (US) and Direct Commerce (UK)
- Founded Marketing Systems Analysis, 1992
- Helped 240+ companies specify, select, and implement order management, eCommerce, and fulfillment systems in the US, UK, and Australia
- Frequent speaker at industry conferences, US and UK

Direct Commerce System Definition



- Order Entry, Order Management
- Customer Service
- eCommerce (module or integration)
- Inventory Management
- Fulfillment
- Customer Management
- Required Integrations (or modules)
 - Payment processing
 - Sales tax management
- Important options (or integrations)
 - Reporting
 - Accounting

Special Functionality



- Continuity orders
- Gift management
- Personalization
- Digital product management
- Product caging (high-value products)
- Affiliate/3rd-party item sales
- Multiple brand/company management for order entry/ fulfillment (paperwork)

Retail Option



- Most “multichannel OMS systems” do NOT include retail functionality
- Some have a simple “cash-drawer” management tool for a warehouse store
- Typically, the systems are integrated with a retail platform (even one from the same vendor)
- Retail platforms handle POS/till, store inventory/ replenishment, and some forecasting (such as “Open To Buy”)

Classifying the Systems



- “Major” Systems Players
 - 20 years+ in the business
 - Systems Base Costs: mid-high six figures+++
 - Typically no VARs involved, but sometimes are
- The systems
 - Red Prairie (“Ecometry”)
 - CommercialWare (Micros/Datavantage)
 - CWDirect: IBM DB2 database
 - CWSerenade: MS/SQL, Oracle options
 - Sterling Selling & Fulfillment Suite (IBM)

Classifying the Systems



- The Major Middle (alphabetical)
 - Circle Commerce Manager (Circle Commerce) uniVerse
 - Directions (Peppler) DB2
 - InOrder (Morse Data) SQL/Server
 - Junction MCR (Junction Solutions, US and UK) Dynamics/AX
 - MACH3 (Data Management Assocs.) uniVerse
 - NaturalOrder (NaturalSolutions) SQL/PowerBuilder

Classifying the Systems



- **The Minor Middle**

- Assist Cornerstone (DB2)
- Commerce Management System (NewHaven) Sybase
- ComSys (was Computer Solutions) (OrderPower!) DB2
- Datamann (Mail Order Software Plus – MOSP) Indexed Vision database
- Multichannel Order Manager (Dydacomp) SQL/Server (*verging down to Low End*)
- OMX (OrderMotion) SQL/Server
- Response (CoLinear) SQL/Server (*verging on Major Middle*)
- TernoVelocity (Terno & Assocs.) uniVerse

Classifying the Systems



- The Newcomers
 - Ability Commerce (bought Abison)
 - BMI-Global (hosted, under the radar)
 - Island Pacific (IPDirect) (retail-based)
 - “ActiveSeries” (MNP Media, UK-based)
 - OrderActive
 - WMSActive
 - PMSActive (Procurement Management System)
 - Omnica MCR (UK-based, Dynamics/AX) HSO=US VAR

Classifying the Systems



- Low-End Systems
 - MailWare (CORE Technologies)
 - OnDemand eCommerce Platform (Order Dynamics), Canadian, hosted solution
 - OneVue (VuePoint, Progresss)
 - OpenMCR (open source, hosted option)
 - opentaps (Open Source Strategies)
 - Stone Edge Order Manager (Monsoon Commerce) MS Access
(Integrates with more than 3 dozen shopping carts and sales channels)

Classifying the Systems



- “Oddballs”
 - Not serving “mainstream” users
 - Or their approach/structure not mainstream
 - Don’t always “get it”
 - Can be difficult to implement and work with
- The Vendors
 - BusinessFlow (Mainstreet Commerce)
 - NetSuite (Oracle)
 - CIODirect (Web-based for 3PL fulfillment)
 - Direct500 (AccuPointe): add-on to MAS/500

Classifying the Systems



- eCommerce-based
 - Celerant
 - GoECart
 - hybris (bought iCongo)
 - OrderDynamics

Classifying the Systems



- Retail-based/POS + OMS
 - CORESense (browser/hosted)
 - Magstar Total Retail (Magstar, Montreal),
APPGEN