



OMNICHANNEL SALES

Retail & eCommerce Industry Brief

Omnichannel sales integrate the various sales channels organizations use to interact with consumers, with the goal of creating a consistent brand experience. This includes physical (e.g., stores) and digital channels (e.g., websites, online marketplaces).

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Grow Revenue, Increase Profits, and Delight Customers with a Modern ERP Platform

Thanks to technology and the internet, traditional selling models are quickly being replaced by newer, innovative sales techniques that appeal to consumers with the promise of personalization, convenience, and an immersive buying experience.

Companies must allow consumers to research, buy, pick-up, and return goods as easily as possible—in-store, over the phone, online, via kiosks, and with a frictionless engagement process. Whether selling to consumers (B2C), commercial customers (B2B), or directly from manufacturer to end-user (D2C), this is the essence of an omnichannel sales model.

Omnichannel is typically associated with sales to end-users (consumers). However, business and government customers are also looking for the same personalization, convenience, an innovation to make their purchasing efforts as seamless and flexible as possible. It is important to understand the various customer models—and their particular buying needs—to be recognized as a preferred vendor.

Modern ERP applications like Acumatica streamline omnichannel selling processes. Orders received across channels are harmonized. Fulfillment processes are optimized. Real-time insights into inventory levels regardless of stock location are available with customizable dashboards, and customer personalization is gleaned from prior purchasing history, promotions, and logged customer service interactions.

This industry brief explains critical omnichannel business processes with an overview of technology requirements and an ERP feature checklist. Discover how small and mid-sized merchants grow their customer lifetime value (CLV) by using a cloud-native ERP platform.



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.

<p>CONVENIENCE</p> <p>Gift Cards</p>  <p>Make gift cards available, transferrable, and redeemable whether online or in-store. Track gift card balances online or at POS stations.</p>	<p>REWARDS</p> <p>Loyalty Programs</p>  <p>Reward the best and most profitable customers with perks and loyalty benefits such as price discounts, cash back, priority service, and free shipping.</p>	<p>PERSONALIZATION</p> <p>Mass Customization</p>  <p>Consumers can personalize purchases with engraving, artwork, or other custom additions. Send coupons to mobile devices based on a customer's prior buying habits.</p>
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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.

<p>CONVENIENCE</p> <p>Customer Hierarchy</p>  <p>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.</p>	<p>FLEXIBILITY</p> <p>Payment Terms</p>  <p>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.</p>	<p>PERSONALIZATION</p> <p>Specific Pricing</p>  <p>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.</p>
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Direct to Consumer (D2C) Sales

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

<p>VERTICAL INTEGRATION</p> <p>Manufacturing Support</p>  <p>Combine manufacturing, distribution, and sales operations to effectively design, build, distribute, and sell goods in a vertically integrated operating model.</p>	<p>REWARDS</p> <p>Loyalty Programs</p>  <p>Reward the best and most profitable customers. Encourage advocacy of your brand via social media related public forums.</p>	<p>PERSONALIZATION</p> <p>Consumer Relationships</p>  <p>Leverage embedded CRM tools to communicate directly with consumers using digital marketing. Foster brand equity and affinity.</p>
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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.		✓		



“Acumatica’s integration with our websites and the ability to better track customers was great for us. Reporting is very robust and the ability to create reports specific to us is huge. Now that we have a CRM, we are creating an outbound sales division and doing account management, which was hard to do before because we had no central resource for data. Having accounting from our various sub-companies rolled up is more efficient. Better reporting makes us a better company overall.”

–Steve Cates, President (former), Ray Allen Manufacturing

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Clive Coffee Takes the Home Espresso Experience to the Next Level with Acumatica Cloud ERP

CLIVE COFFEE

Founded in Portland, OR in 2008, Clive Coffee sells luxury home espresso machines and accessories, operates a personalized coffee subscription service, and runs a virtual coffee school. The staff strives to provide the equipment and knowledge to help consumers attain the perfect barista experience at home.

Initially, the company sold its espresso machines through its showroom and in-person sales in Portland, Oregon as well as through its website. Later, Clive Coffee began offering personalized coffee subscriptions connecting consumers with roasters all over the country. The company subsequently launched its Coffee School to help those working from home learn how to become baristas, and adapted its sales efforts to better serve consumers, such as adding a warehouse in Nashville, TN.

“When we switched to Acumatica, it really created a seamless experience for our consumer, because our data accuracy, our inventory, and the way we communicated with our customers was in one spot and created a single source of truth.”

–Amanda Datte, CFO
Clive Coffee

Clive Coffee couldn’t meet consumer expectations because it used QuickBooks for accounting and bookkeeping, a separate inventory software, a different order processing system, and an eCommerce system. None of the systems were connected. When systems are decentralized, “you spend a lot of time analyzing: Why didn’t one thing talk to the other? We spent a lot of time either making our data look the same in both systems and understanding why it didn’t connect.”, said the firm’s Supply Chain and Operations Manager.

The Clive Coffee ERP selection team researched the big-name ERPs like SAP and Oracle NetSuite and smaller players. “We found a perfect size for us in terms of cost and flexibility, which was Acumatica,” CFO Amanda Datte says. “As soon as we saw Acumatica demos and heard everything about how versatile it could be, it was hard to keep looking at anything else.”

With Acumatica, Clive Coffee can now meet its increased customer expectations. “We’re in this era of, you buy something online, you want it at your doorstep the next day,” says Datte. “Because our inventory is tied to our eCommerce site, a customer can now see what’s available and be able to predict when they’re actually going to have it in their house and ready to use . . . We feel like we are prepared by using Acumatica for whatever the market has to offer.”

“Acumatica has been behind our success and their support team has been integral in making sure that we’ve been as successful as possible. I would definitely recommend Acumatica to someone looking for a new ERP solution. Acumatica would be a great asset to anyone trying to expand its eCommerce platform.”

–Thomas Finney, IT Director, Shoebacca

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CONCLUSION

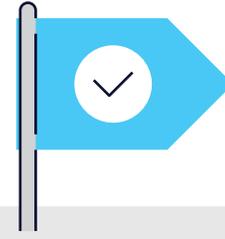
Fend Off Competitors, Delight Customers, and Manage Growth with a Modern ERP Platform

There is little room for error in an omnichannel sales model. Customers expect high-quality products with a personalized, convenient experience. Progressive merchants rely on modern cloud ERP applications like Acumatica to boost sales, optimize operations, cut costs, and exceed customer expectations.

Supercharge your business with a digital business platform that is easy to use with comprehensive financial applications and robust analytics for better decision-making. Sell more with up-sell, cross-sell, replacement items, online storefronts, and point-of-sale applications at brick-and-mortar stores or showrooms.

Harmonize the buying experience whether in-store, online, at kiosks, over the phone, or via catalog sales. Meet customers where they are and allow them to purchase, receive, pay, and return goods seamlessly wherever the transactions occur. Keep customers informed of their order status, promote new product launches, or entice loyalty using embedded CRM tools.

Access embedded applications for customer support, field services, and connections with webstores or marketplaces to automate operations across departments from a central platform. Discover why Acumatica is the fastest growing and [most user-friendly ERP application](#) according to discerning customers and industry analysts.



“Our technological journey has been a bit crazy and I imagine most startups go through this. We’ve been happy to land on Acumatica. It’s robust, it’s flexible, it’s simple but it also has an API so as you need to connect into it, there’s an ability for that as well.”

– BRYAN PAPÈ,
FOUNDER AND CEO
MIIR

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Acumatica Cloud ERP is a comprehensive business management solution that was born in the cloud and built for more connected, collaborative ways of working. Designed explicitly to enable small and mid-market companies to thrive in today’s digital economy, Acumatica’s flexible solution, customer-friendly business practices, and industry-specific functionality help growing businesses adapt to fast-moving markets and take control of their future.

For more information on Acumatica, visit www.acumatica.com or follow us on [LinkedIn](#).



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