

## axis diplomat

### Mail Order Processing

The **axis diplomat** Mail Order Processing module is ideally suited to use in a busy telesales office, primarily in retail type operations.



#### The Mail Order Processing Module

Trade account sales operations are characterised by a high number of repeat transactions from a relatively small number of account customers. The standard **axis diplomat** Sales Order Processing module is designed to work in this environment by rapidly locating a customer account and quickly entering a sales order on that account.

Retail telesales/mail order operations differ in typically having infrequent dealings with a larger customer base - it is not unusual for customers in the situations to make perhaps just one purchase per year.

The **axis diplomat** Mail Order Processing module handles this by allowing rapid creation of new customer accounts and by allowing large numbers of customer account records to be created. Retail telesales is also characterised by the high percentage of transactions which are credit or debit card based.

#### Postcode Database

In order to facilitate quick and error-free customer account creation, the **axis diplomat** Mail Order Processing module interfaces to a postcode database, issued on CDROM with quarterly updates.

When using the Telesales Order Entry function to create a new customer account record, the operator simply enters the postcode which is sufficient for the system to retrieve virtually the full address from the postcode database. It is then only necessary to add the customers' house number or name to complete the address details.

This provides for a very quick, easy and professional way of handling sales and enquiries over the telephone - starting in the Telesales Order Entry function, the operator simply asks the caller for their surname and postcode first, if a record already exists, the details can be confirmed with the caller, if not, entry can be completed by simply asking for their name, house number, telephone number (and fax number if appropriate). This is effectively the only information which has to be entered to create the customer account there and then - other information can be entered if appropriate, such as customer group and order source codes.

Not only is this method efficient and reliable (because the customer is not dictating their full address) but it is also perceived by the caller as being efficient and professional - and customer perception can be as important as your own efficiency.

## Large Customer File

Because retail mail order processing is normally characterised by a large number of customers buying infrequently, the **axis diplomat** Mail Order Processing module extends the Sales Ledger to allow close to half a million customer account details to be recorded.

This makes it practical for individual Customer Accounts to be created for each caller, instead of using a miscellaneous "cash sales" account.

The advantage of this method of operation is that much greater sales analysis is possible, particularly in conjunction with the Archiving sales analysis reports. It is possible, for example, to determine which products have been sold to a given group of customers over a particular period of time or, conversely, which customers have bought a selected range of products over a given period.

## Credit Card Authorisation

Credit card and debit card payments are becoming increasingly common, not only in retail mail order processing, but also increasingly with trade account telesales.

Using the **axis diplomat** Mail Order Processing module, card details can be recorded on each sales order and, at predefined intervals during the day, credit card details are automatically transmitted to your bank, by modem, for authorisation.

The Telesales Order Entry carries out its own validation on the credit card details entered which helps to catch simple typing errors and misreading of numbers. More importantly, this helps to trap problems at the point where the customer is still on the telephone. Full validation is then carried out by the bank as part of the authorisation procedure.

Once the details of all new credit card sales orders has been sent to the bank, the status of each sales order is updated to indicate whether it has been authorised or refused. Declined (i.e. those for which authorisation was refused) orders are given a code to indicate whether the card in question was stolen, expired, out of credit, etc.

The system also allows individual orders to be manually authorised by making a telephone call to the bank in the normal way.

A report can be produced from the system to indicate which sales orders have been declined. This can then be used by the telesales department to call back the customer(s) in question to request alternative payment.

Once a credit card has been authorised, the authorisation code is valid for a fixed period of time (usually 10 days). If the order has not been shipped during that time (perhaps because there is a temporary stock shortage), the system will automatically request re-authorisation.

Once each authorised sales order has been picked, it is released and a payment request generated. Overnight, your bank collects all of the outstanding payment requests directly from the computer using a modem. Payment is assured since the credit cards have already been authorised and so cash receipt transactions are automatically created along with the invoice. The invoices are immediately and automatically allocated at the time at which the payment request is generated.

Using this method of operation, not only is there no need to enter the credit card details into a credit card authorisation machine (a "PDQ" machine) with its potential for keyboard error but there is also no need to enter cash received transactions into **axis diplomat** and to allocate each invoice.

## Further Information

For further details please call one of our sale team on **0800 668 1934** or by visiting our website [www.axissoftware.co.uk](http://www.axissoftware.co.uk)



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