Orderoso: Simplifying Order Management and Real-time Reporting

New mobile app facilitates better communication, from the winery down to the sales rep, to the distributor/wholesaler and back up the pipeline.

Erin Guenther

TRACY OTOIDE WAS SITTING in on a meeting between a friend and her sales rep, looking at hand-written orders for items to be sold in a children's clothing store. The pieces of paper were passed around, faxed and sent around—"crazy things" were being done. So she called up her old friend, **Rob Rhyne**, with an idea.

"I spoke to him and said, 'Check out this piece of paper that gets sent around all over the place just to place an order,'" she said. "So we did some research and found that this is really prevalent in a lot of industries. The minimum thing we could do was at least put [an order management] product out there and see if it would work."

Thus spawned **Orderoso**, a mobile wine order management app built to cut down time and errors, help perfect a brand story with its multimedia capacity and eliminate paper trails. Launched in 2012 and targeted at wholesalers and distributors, Orderoso offers two main benefits: order management with real-time reporting and mobile catalogs.

So why wine? A wine sales representative she talked to soon after envisioning the product said, "Well, I can use that right now. Why don't we give it a shot?" She and Rhyne then came up with a product that would facilitate clean and simple order management (order entry and processing) that would assist wineries, sales reps, wholesalers and distributors to work cohesively to sell and manage wine.
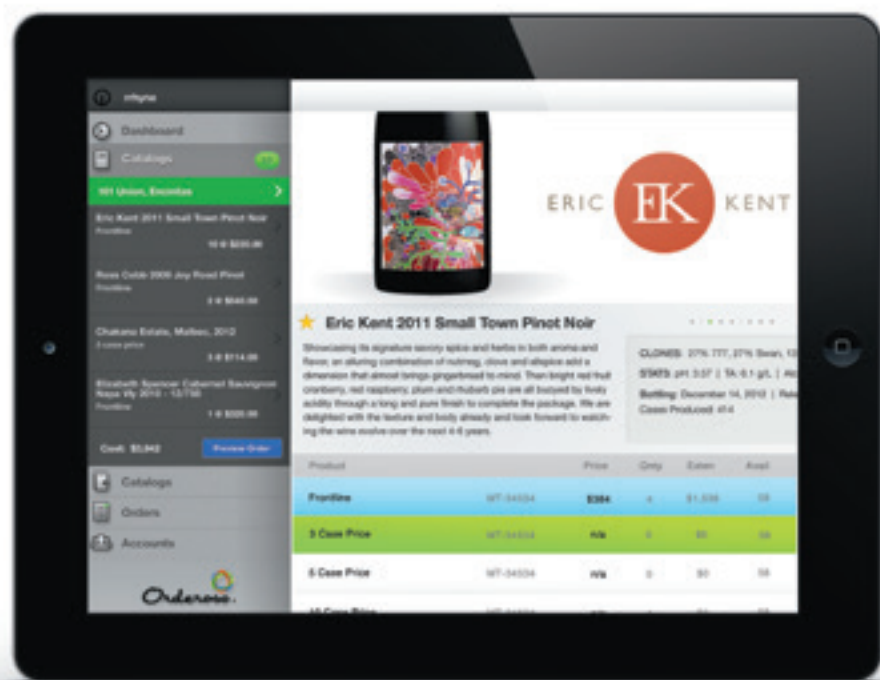
"The first project we worked on together was wine-oriented. So when we found that this industry really needed the solution we were building, it became laser-focused at that point," said Rhyne. "We found that in our first meetings, we uncovered such a massive pain point that we could solve. There wasn't a lot of thought toward other industries after that."

"Wine is funny. It's so short-lived—even the vintages change so quickly—and inventory is so low on any given product that every exchange is done so rapidly that you have to have technology backing you if you're selling it. It's just a natural, really," said Rhyne.

Order Management and Real-time Reporting

Facilitating better communication, from the winery down to the sales rep, to the distributor/wholesaler and back up the pipeline again, through eliminating paper and several data entry points was the most important feature when developing the app.

Typically, a sales rep out in the field would call in to ask what the last order was and how much was paid for it, then speak with the account and call back in to place the order. The order would then be written down and given to the order desk, which would then enter the order into its own system, whether that's **Quickbooks** or **Excel**, etc. The order would then be sent to the warehouse which, if not integrated into the system, might even say the inventory isn't available and can cause mistakes.

"It shows you how much data entry happens in this industry that shouldn't," said Rhyne.

With Orderoso, all that information is already included in the database, and with one platform, a sales rep can view inventory and past sales prices, place an order and have it shipped. The order can also be entered into the winery's accounting system.

"Reps send in the order, and with a couple of clicks, the office staff can push that order through wherever it needs to go," said Otoide.

The app can be used as a standalone product or in conjunction with an ERP, CRM, accounting or custom software. It is currently integrated with QuickBooks and **Salesforce**, and other platforms are being looked into.

"There's a long history of people trying to make these monolithic CRMs that are built for every single type of business on the planet. Whereas for wine, it is so complex that to make that happen requires a lot of customization, and it's not easily used," said Rhyne. "That's where we've won, is that we've actually pulled 20 reps off of Salesforce to go with Orderoso because it was built specifically for wine. That's the key difference."
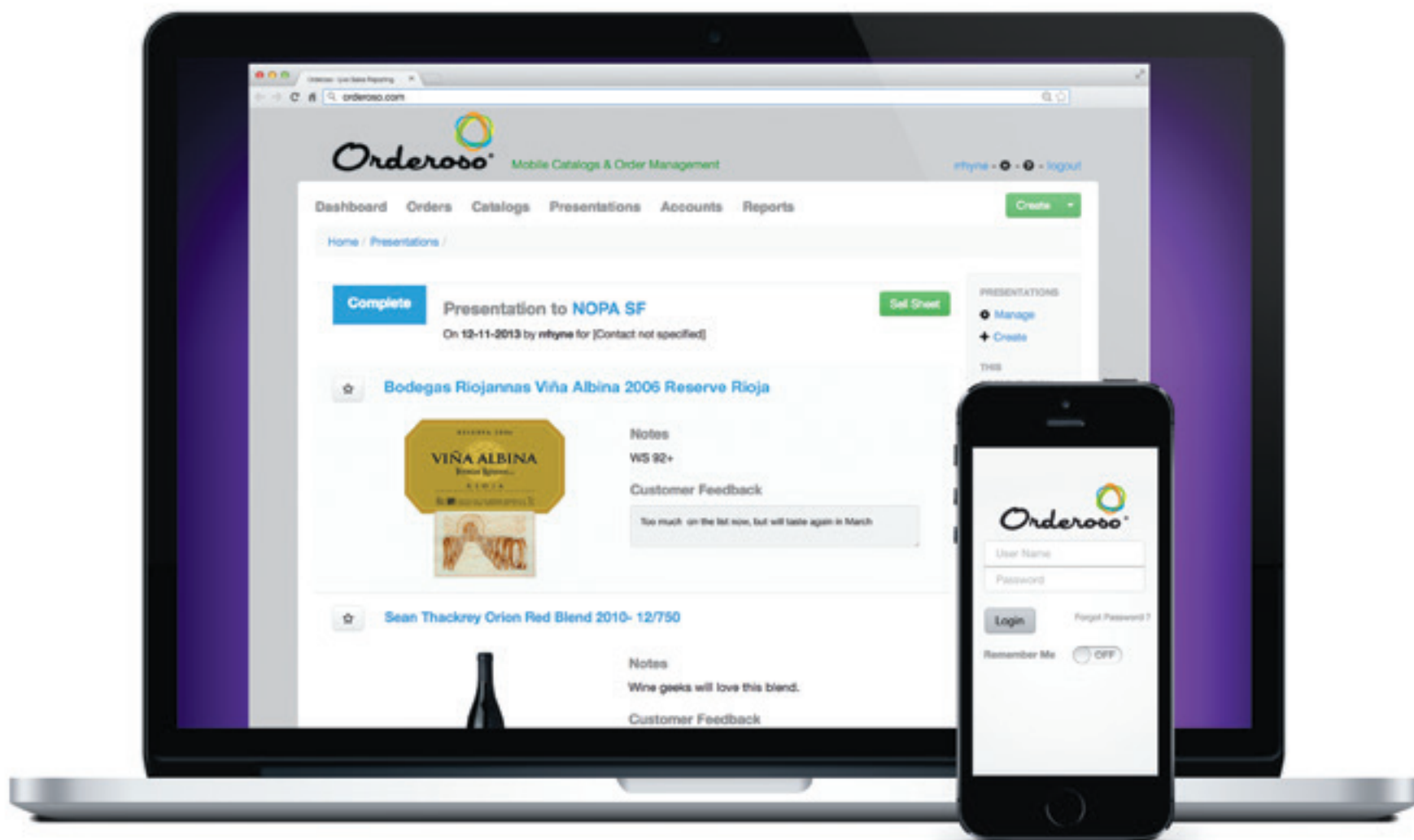
Mobile Catalogs

The other main feature of the app is its inclusion of marketing and trade materials. Wineries are able to upload photos, video, biographies and other brand message materials, in addition to tech sheets, inventory levels and prices. Using this in conjunction with the order management aspect provides an all-in-one tool for managing portfolios. Rhyne tells the story of **Robert Morrison** of **Authentic Wine Solutions**, who created a catalog on Orderoso with imagery, tasting notes and winery notes, went to a winery unsolicited, showed how he would present and sell the brand and grabbed the account.

"Along those same lines we have a wholesaler we work with who has this brand that they just pitched—it's a bigger brand than they usually work with and is higher-profile," said Otoide. "When they put together their corporate profile to pitch that brand, Orderoso was essential to their conversation as to why they offer a competitive edge to other wholesalers. We're a total ace in their pocket when it comes to explaining why their sales force is superior to other sales forces."

Instant reports are available, enabling better account relations as well as stocking, sales, marketing and product development decisions. Unique to the app, feedback from buyers is included with each wine. Whether it's "the price is too high" or "there's too much Chardonnay on my list," these notes are beneficial to a winery looking to make future product or pricing choices as well as to the reps who will know not to go back to certain buyers with more high-priced wine or another Chardonnay.

"If we enable better lines of communication from the winery all the way down to the buyer through this process, then the three-tier distribution system is much less painful than it is currently," said Rhyne. "That includes brand media traveling downstream all the way to the buyer and sales feedback traveling from the buyer all the way upstream to the brand. There is nothing in the environment today that can capture that client information and get that back up to the winery."

Feedback from the reps and wineries was crucial in building the product, as the platform wouldn't work unless they were willing to consistently input information into the database.

"What they get in return is the depth of information that they can use to increase order volume and get higher sales. The way we present that information back to them at the right time and in the right way is really valuable," said Otoide.

Building a Better Sales Force

The makers of Orderoso are constantly working on ways to create solutions. There are plans to build in ways to track special pricing promotions to certain wholesalers, as well as more platforms and warehouses to integrate with. According to Otoide, Orderoso is also looking at tools that will help buyers with some of their problems in the same way they have helped wholesalers. In addition, there has been some good interest from importers in the past few months—with sets of needs that are both similar and dissimilar to that of wholesalers and distributors, it seems like the natural next step.

Wholesaler pricing for Orderoso is a monthly fee based on the number of users in the company and their roles. Sales reps are $35 a month and administrators are $70 a month. For a winery, the charge is $150 a month and all users have access to its features.

For more information on Orderoso, visit *www.orderoso.com*. **WBM**