

Business Process Automation

ARE YOUR SYSTEMS HOLDING YOU BACK?

Your Online Business System Toolkit 2017

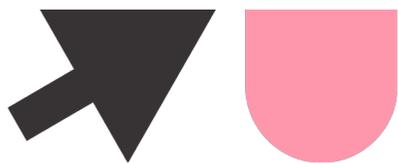




VU ONLINE

Helping businesses take the next
step in their digital growth.

**BUSINESS
SYSTEM
TOOLKIT**



INTRO

Many clients tell us that after having made the decision to begin or to scale automating their business processes, taking the next step and actually choosing the right software to invest in for their business can feel like a giant leap in the dark.

Like them, you might be wondering how you're going to be able to separate the wheat from the chaff and choose the one that meets all your business needs. We know exactly how you feel. In fact, we felt the same when we were starting out and when making the transition to scale.

Then a few months ago we found the best way to keep track of all these elements and decided to put together this resource guide and checklist for you to help get you and your business on your way to selecting the right system and get on track to automation success.

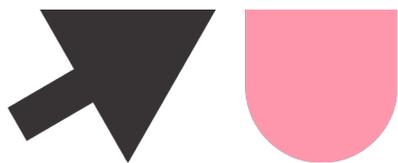
We have curated a list of some of the top-performing online business systems. While we recognise these systems are highly rated, please note, any software listed here is not an endorsement of these platforms and systems by us. We recommend that you do full research and duly test the products before committing to using them within your business.

Let's get started...

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1. CONSIDERATIONS

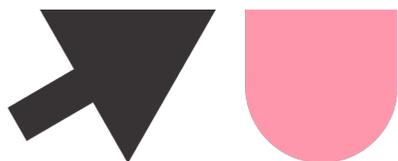
Things to consider before investing in software for your business

- Is it hosted on web, cloud or download on desktop?
- Does it have all the features you, your team and your business needs?
- Can it easily integrate with your existing systems?
- Can your team easily access it when they need to?
- Can your clients easily access it if they need to?
- Is there mobile access or a mobile app?
- Is it scalable as your business grows?
- What is the customer service and support level rating?
- Does it cover B2B, B2C or both?
- Does it include features for your supplier where applicable?
- What is the annual cost?
- Is there an option to pay monthly?
- Is there a free trial?
- How much training is required before you can go live?

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1. ORDER ENTRY SOFTWARE

1. Brightpearl

Built for growing retailers, Brightpearl cloud software gives you real-time accounting insight, combining orders, inventory, customer data, accounting and reporting into a single retail management system. Gain the efficiency and insight you need with real-time integrated inventory, cash flow, profitability by SKU and channel, customer purchase behaviour and more.

2. Megaventory

Web-based inventory, order management, CRM and reporting system for small to medium businesses with multiple locations. Add multiple users with variable permissions, track inventory levels, prepare sales and purchase orders, sales quotes, handle inbound and outbound goods and regain overall control of your company.

3. Pepperi

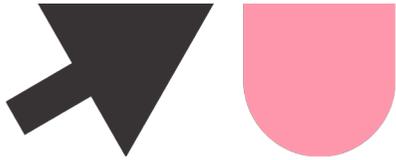
It's the mobile sales suite for brands and wholesalers, increasing sales by 20% or more, cutting order processing costs by as much as 30%, and delivering a memorable buying experience for B2B customers. Pepperi fully supports omni-channel B2B sales with fully customisable apps for: catalogue presentation, order taking, merchandising, and B2B ecommerce. The Pepperi SaaS platform is enterprise grade, delivering its mobile-agnostic sales apps via native iOS, Android and Windows 10.

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1. ORDER ENTRY SOFTWARE



4. Handshake

Handshake is the #1 rated sales order management app for wholesale. Use Handshake to write bigger orders, reduce order processing costs, speed up fulfilment and accelerate your team's performance. Handshake's mobile apps give you everything your team needs to write orders, fast. Handshake is also a single, powerful website to manage the orders being placed in the field and a central place to make customer and product updates.

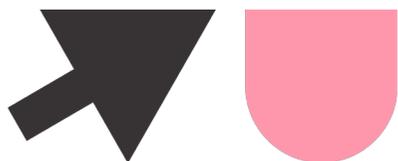
5. Elastic

Elastic is the most complete B2B platform available on the market, taking care of all your sales process needs and creating a brand-differentiating experience for both reps and dealers. The Elastic solution features include a Digital/Custom Catalogue Builder, Online Order Entry with live ATS and ERP integration, OrdeVisual Assortment Planning and Whiteboarding tools. It also leverages your marketing assets to make it feel like your B2C site.

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2. ECOMMERCE SOFTWARE

1. Magento

Magento Enterprise Edition is the complete ecommerce solution for businesses that are ready to take full advantage of their online channel. This solution combines an unrivalled feature, set with world-class support and virtually infinite flexibility, at a fraction of the price charged by competitive platforms.

2. WooCommerce

WooCommerce is a free, open-source shopping cart plugin that works expressly with WordPress sites. Since its founding in September of 2001, the WooCommerce plugin has been downloaded over 19 million times. To date, WooCommerce claims to run 1.7M active stores, a staggering 39% of all eCommerce sites. You could say people like it.

Although WooCommerce is free to download, it is not totally free to actually operate a WooCommerce store. You can expect to spend a nice sum on web hosting and the extensions you'll need to run advanced features.

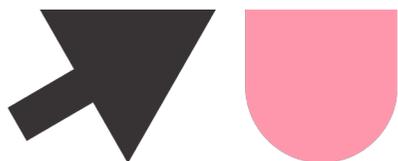
3. Opencart

OpenCart is an open-source, downloadable shopping cart that's free to own, upgrade and use. OpenCart follows a core+extensions model. Out of the box, it's a fairly light platform and you can easily plugin add-ons in order to perform higher-level functions.

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2. E-COMMERCE SOFTWARE

Fortunately, OpenCart has a large and diverse community of developers who are consistently adding to an already enormous pool of 14,000 extensions.

4. BigCommerce

BigCommerce is the world's fastest-growing ecommerce platform, powering more than 95,000 stores. You'll get everything you need to create a successful online store, including a securely hosted site, shopping cart, product catalogue and more.

Themes and point-and-click design features make it easy to build a gorgeous site without any design or technical skills, while powerful built-in marketing and conversion optimisation tools help you promote your business and sell more..

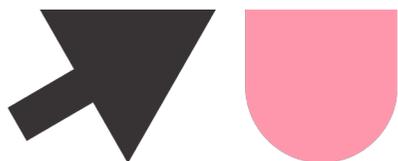
5. Shopify

Shopify is a commerce platform that allows anyone to easily sell online, at a retail location, and everywhere in between. Shopify offers a professional online storefront, a payment solution to accept credit cards, and the Shopify POS application to power retail sales.

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3. HELP DESK

1. Manage Engine

ManageEngine ServiceDesk Plus is a completely web-based Help Desk and Asset Management software. It offers an integrated package with Incident Management (Trouble-Ticketing), Asset Tracking, Purchasing, Contract Management, Self-Service Portal, and Knowledge Base at an affordable price point. ServiceDesk Plus provides all that you need to have a fully fledged IT Help Desk and a productive Help Desk staff. ManageEngine ServiceDesk Plus is available in both normal edition and also ITIL edition.

2. User Voice

It only takes a few minutes to embed a UserVoice widget, or mobile SDK, into your app, giving you a comprehensive solution for anything your users can throw at you. Scale support effortlessly with ticketing & Instant Answers. Stay on top of churn with satisfaction surveys. Aggregate and analyze product feedback from thousands (or millions) without breaking a sweat.

3. Click Desk

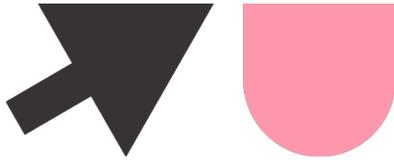
Startups, small and medium businesses use ClickDesk to engage their website visitors and customers through multiple channels such as live chat, help desk, browser phone and social media. It is a web-based, multi-channel customer engagement application offering Live chat, Help desk, Browser phone and Social Toolbar.

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3. HELP DESK



4. Freshdesk

Freshdesk is a cloud-based helpdesk solution that offers everything a business needs to deliver exceptional support. Unlike competing products with steep pricing tiers and hidden strings, Freshdesk is priced affordably, and is free forever for the first three agents. Built with an emphasis on usability, Freshdesk offers all the tools a company needs to wow its customers - robust multichannel capability, integrated game mechanics to supercharge agent productivity, smart automations and a lot more!

5. Zendesk

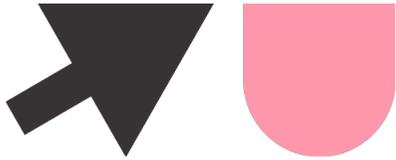
Zendesk is the leading cloud-based customer service software solution. More than 40,000 companies such as Gilt Groupe, Box, and Disney are using Zendesk to lower their support costs, raise productivity and increase customer satisfaction. Loved by both service teams and their customers for its beautifully simple interface, Zendesk is easy to try, buy, implement and use.

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4. CUSTOMER RELATIONSHIP MANAGEMENT (CRM)



1. Salesforce

SalesforceIQ CRM is an out-of-the-box solution that sets up in minutes and is designed for growing businesses. SalesforceIQ allows sales teams to prioritise and spend time where it matters by eliminating manual data entry and proactively surfacing key insights. Or choose Sales Cloud, a customisable CRM platform that grows with you. Get real-time customer information and activity in one place, plus insights with dashboards and reports.

2. Zoho

Zoho CRM empowers small to large-sized organisations with a complete customer relationship lifecycle management solution for managing organisation-wide sales, marketing, customer support and service and inventory management in a single business system.

3. Act!

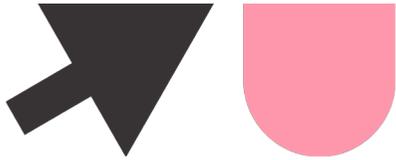
Act! is the #1 best-selling Contact and Customer Manager for over 25 years. Affordable and easy to use, Act! is the trusted solution to help individuals, small businesses, and sales teams organise prospect and customer details in one place, market products and services more effectively, and drive sales results - in the office and on the road.

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4. CUSTOMER RELATIONSHIP MANAGEMENT (CRM)



4. Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enable your people to make important business decisions with greater confidence. Microsoft Dynamics works like and with familiar Microsoft software-easing adoption and reducing the risks inherent with implementing a new solution. These solutions automate and streamline financial, customer relationship and supply-chain processes in a way that can help you drive business success.

5. Capsule

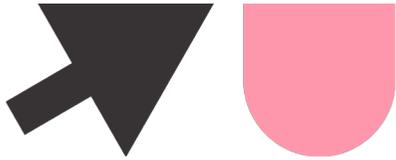
Capsule is great starting point for small businesses as it's free with the google suite. It is easy to use, has the capability to store up to 50,000 contacts, assign values and opportunities to them, and track and manage your success. It also integrates well with accounting and email systems like Mailchimp.

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5. ACCOUNTING AND INVOICING



1. Quickbooks

Quickbooks is the leading accounting software for small businesses. Manage all your finances with either their licensed or online version. Instant access to customer, vendor and employee information. Free support and upgrades with online version. Comes with a 30 day free trial and \$12.95/month thereafter.

2. Freeagent

Freeagent is a powerful accounting tool that will import your banking transactions, allow you to add clients and assign invoices, estimates and jobs. You can then report on all the information and see corporation tax estimates, even categorise up your finances to offer you more tracking power as well as manage your sundries and mileage payments, giving you different levels of login for employees to use the system.

3. Freshbooks

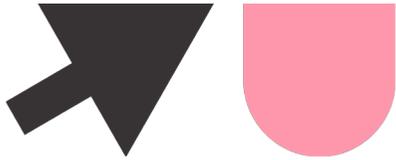
FreshBooks is an online invoicing and time-tracking service that saves you time and makes you look professional - Fortune 500 professional. We believe financial record-keeping should be easy, fast, (and perhaps even fun), but still detailed enough to satisfy your accountant. Freshbooks is easy to use and you can try it for free.

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5. ACCOUNTING AND INVOICING



4. Wave

Wave offers 100% free, real double-entry accounting for small businesses. As a cloud-based software, Wave allows you to access your data from anywhere, add unlimited collaborators and work on all of your businesses from a single login. Wave eliminates data-entry and puts the financial reports you need at your fingertips, allowing you to spend more time doing what you love. Your accounting is also seamlessly integrated with invoicing, receipt scanning, payment processing and payroll.

5. Oracle Financials

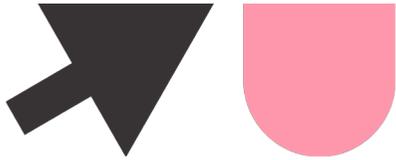
Complete financial management solution that includes general ledger, accounts payable, accounts receivable, fixed assets and cash management.

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6. EMAIL MARKETING



1. Mailchimp

More than 12 million people and businesses around the world use MailChimp. Their features and integrations allow you to send marketing emails, automated messages and targeted campaigns. And their detailed reports help you keep improving over time.

2. Constant Contact

Constant Contact is dedicated to helping small businesses and organisations forge strong customer relationships with email marketing. Constant Contact's easy and affordable solution helps you reach your customers and members without technical skills. They'll show you how to build, manage and grow an effective permission-based email list so you can create and send professional-looking email newsletters. You can try Constant Contact Email Marketing free for 60 days.

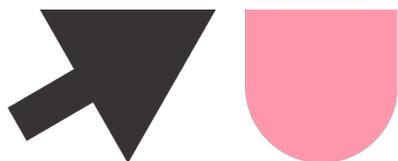
3. VerticalResponse

VerticalResponse provides email marketing tools that help small businesses stay connected with their customers. Send professional-looking emails like newsletters, offers and promotions, and invites without a designer or any HTML coding. Choose from a variety of templates that automatically adapt to look great whether they are read on PCs, phones or tablets.

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6. EMAIL MARKETING

And with a couple of clicks, reach even more people by sharing the same message on Facebook and Twitter.

4. Campaign Monitor

Sign up for free and start creating your first email immediately. Create pixel-perfect designs with our drag-and-drop tools and use powerful automation workflows to send relevant and personalised emails. Design beautiful, branded and personalised emails with their email builder that look incredible in every inbox, on every device. Use their list management tools to manage your subscribers with ease and build segments based on your own criteria.

5. GetResponse

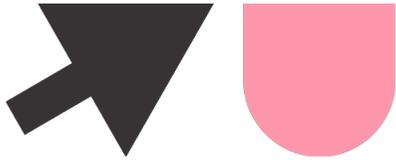
GetResponse email marketing and online campaign management platform helps entrepreneurs build targeted subscriber lists and send high-impact newsletters, video emails, and follow-up campaigns. It offers marketing automation, responsive email design, hundreds of ready-to-use email templates, landing page creator and useful statistical analysis tools.

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7. MEMBERSHIP MANAGEMENT SOFTWARE



1. Wild Apricot

Wild Apricot helps thousands of organisations spend less time on administrative tasks, like processing payments and updating Excel files, and more time on growing their membership. It's designed for volunteer run and small staff organisations with a user-friendly back end so that you don't have to be a technical genius to take your organisation to the next level. In addition, you'll have access to a community of peers and experts that share knowledge and best practices.

2. MemberPlanet

MemberPlanet is member management. An essential solution for groups of any size to communicate, process payments and manage their members. The goal at memberplanet is to make your life easier. Sounds simple, right? Because it is. Our system is designed for you to accomplish all of your administrative tasks on one seamless platform so you can get back to what really matters in your life.

3. ASI

iMIS is an all-in-one membership management system that is cloud-based, mobile-ready and PCI-validated. It includes options for membership, fundraising, events, product sales, certification, email, online communities, automation, dashboards, website management, and more. Built from the ground

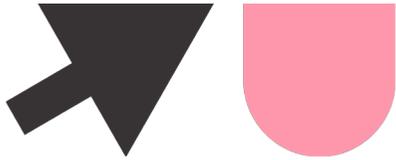
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7. MEMBERSHIP MANAGEMENT SOFTWARE

up with Responsive Web Design (RWD), iMIS can be used on any device.



4. YourMembership

YourMembership provides cloud-based technologies to help associations, organisations, publishers and other companies around the world effectively brand their organisations, engage their customer bases, and streamline their administrative processes. As the globe's largest provider of membership management software, YourMembership now provides comprehensive career centre, media and learning solutions to over 4,300 customers in 32 countries.

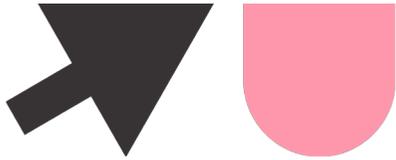
5. Personify

Personify360 CRM, operations management, ebusiness, analytics, and visual tools make everyone's job easier; allows association professionals to make better business decisions; empowers IT to provide better service, and provides a seamless experience for members. Optimise employee performance and customer service with Personify360.

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CONCLUSION

Shortlist your demands

There is no doubt that the right software has the potential make an enormous positive impact on your business, saving time and even staffing - saving your business money.

We hope this guide has been a useful resource for you. If you're looking for something more customised or unique to your business, then use our experience to help guide you to the right systems for the job. If you need something that you don't think exists, we can also plan, build and deploy bespoke applications.

Firstly, just jot down a picking-list of the types of system you currently have and what you would like them to do, then just [get in touch](#) and we can talk further.

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