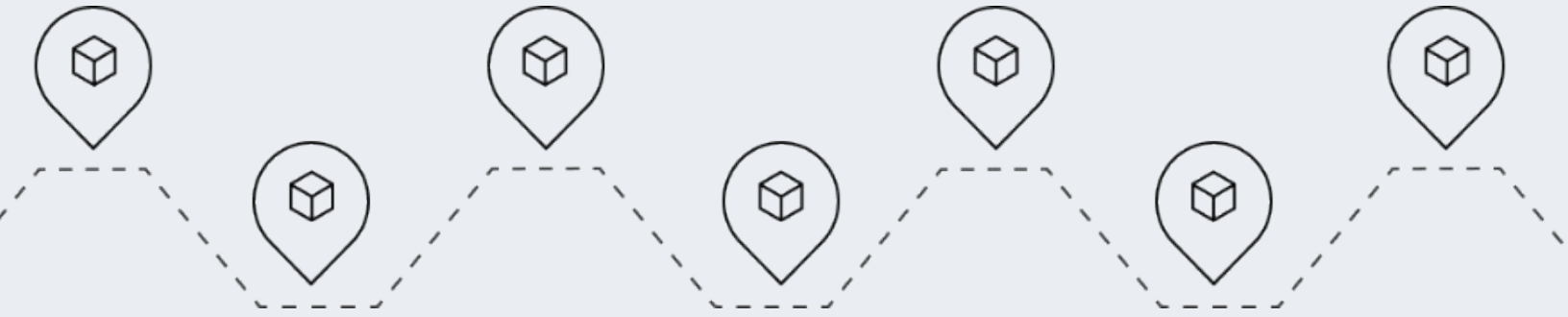
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The Complete OMS Evaluation Question Guide

137 Questions You Should Be Asking Before You Select an Order Management System



How to Use This Guide

This guide is designed for commerce, operations, and technology leaders evaluating order management systems. It covers 14 evaluation dimensions with detailed questions in each, more than you'll have time to cover in a vendor demo, and that's intentional.

The stakes have also risen since previous evaluation cycles. As agentic commerce becomes a commercial reality, where AI agents autonomously browse, compare, and transact on behalf of customers, the OMS sits at the center of whether those interactions fulfill reliably. Platforms that can't respond to real-time inventory queries at machine speed, expose EDD via API, or execute autonomous order flows without human intervention will become operational bottlenecks precisely when speed and accuracy matter most. This guide incorporates that dimension throughout.

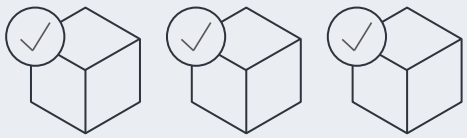
Use it in three ways:

1. **Before the demo:** Send relevant sections to vendor contacts in advance so answers are prepared, not improvised.
2. **During the evaluation:** Use the questions as a scoring framework to compare responses across vendors on the same criteria.
3. **During reference checks:** Adapt these questions for conversations with the vendor's existing customers, particularly around implementation experience and post-go-live support.

Not every question will apply to your business. Use the sections most relevant to your operational model and flag any area where a vendor deflects, generalizes, or defers to a roadmap.

Section 1:

Inventory Management and Availability



Inventory accuracy is foundational. Every downstream OMS capability (order promising, routing, allocation, and customer-facing delivery dates) depends on the system maintaining a reliable, real-time picture of stock across all nodes. This section tests whether the platform can deliver on that foundation at your scale and complexity.

Core Capability Questions

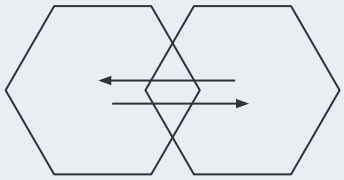
- How does the platform maintain real-time inventory accuracy across all fulfillment nodes, including distribution centers, stores, dropship vendors, and in-transit inventory?
- How does the system prevent overselling during high-velocity events like flash sales or promotional spikes?
- What is the platform's approach to safety stock configuration? Can thresholds be set at the node level, the SKU level, or both?
- How are inventory adjustments handled? Manually, automatically, or both? What triggers automatic adjustments?
- How does the system reconcile inventory discrepancies between the OMS and upstream systems like the ERP or WMS?
- How frequently is inventory synced across the platform, and what is the latency at peak load?

Flexibility and Scalability Questions

- How does the platform handle the addition of new fulfillment nodes (stores, 3PLs, new DCs) without a re-implementation?
- What level of configuration is available to business users for inventory rules versus what requires developer involvement or professional services?
- How does the system handle multi-location inventory pooling and ATP (Available-to-Promise) calculations?
- Does the platform support segmented or ring-fenced inventory, for example, reserving stock for specific channels, customer segments, or order types?

Section 2:

Order Routing, Sourcing, and Allocation



Routing logic is the operational core of any OMS. The questions in this section separate platforms with genuine rules engines from those that apply simple proximity or availability logic. Pay close attention to how vendors answer the profitability question. It reveals whether their routing is built for operational nuance or just availability.

Rules Engine and Logic Questions

- Walk us through your routing rules engine. What variables can be incorporated, for example, carrier costs, labor costs, split order penalties, SLA commitments, node capacity?
- How does the platform optimize for profitability per shipment, not just inventory availability?
- How are routing rules configured and managed? Can business users update rules without developer support?
- What happens when no fulfillment node can satisfy a routing rule? How does the system handle exceptions?
- How does the platform manage order splitting across multiple nodes, and how does it evaluate the cost/benefit of splitting versus delaying?

Fulfillment Type and Scenario Questions

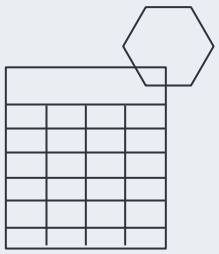
- How does routing logic differ across fulfillment types: Ship-to-Home, BOPIS, curbside pickup, ship-from-store, and ship-to-store?
- How does the platform handle capacity constraints at the node level, for example, limiting orders assigned to a store during peak periods?
- Can routing rules account for carrier-specific constraints such as dimensional weight limits, delivery zone costs, or service level commitments?

AI and Learning Questions

- Does the routing engine use AI or machine learning to improve decisions over time? If so, what data does it train on and how are improvements surfaced?
- Can you pre-schedule routing rule changes to activate and revert between specific dates. For example, shifting to store fulfillment during DC maintenance windows or switching rules for holiday peak?
- How are routing outcomes monitored and reported? Can you see which rules fired, why, and what the result was?
- How does the platform handle high-frequency, programmatic order inputs from AI agents or automated buying flows? Does throughput or routing accuracy degrade under that kind of load?
- Can the platform apply routing logic autonomously, without human review, when orders arrive through agentic or automated channels?

Section 3:

Order Promising and Estimated Delivery Dates



Inaccurate or inconsistent delivery promises are one of the fastest ways to lose customer trust, and one of the most common failure points in OMS implementations. This section evaluates whether the platform can be the authoritative source of delivery promises across every customer-facing and associate-facing surface.

EDD Calculation and Display Questions

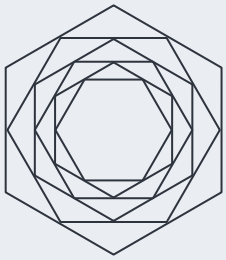
- How does the platform calculate Estimated Delivery Dates? What inputs are factored in, such as carrier transit times, node processing time, cutoff times, carrier pickups?
- At what points in the purchase journey can EDD be displayed? Product page, cart, checkout?
- How frequently is EDD refreshed during a browsing or checkout session?
- How does the platform handle EDD when multiple fulfillment options are available? Does it surface the fastest, cheapest, or most reliable option first?

Consistency and Accuracy Questions

- How does the platform ensure EDD consistency across all touchpoints (storefront, store associate UI, customer service tools, and post-purchase communications)?
- What is the platform's historical EDD accuracy rate for current customers? Can you provide benchmarks?
- How does the system handle EDD when carrier delays or node disruptions occur after an order is placed?
- Can the platform support carrier-confirmed delivery date integration (e.g., UPS, FedEx committed delivery windows)?
- Does the platform expose EDD via API so it can be queried programmatically by AI agents or third-party buying tools in real time?
- What is the API response time for an EDD query at peak load? Is this SLA-backed?

Section 4:

Solution Architecture and Operational Support



"Composable" and "API-first" are now standard vendor vocabulary, which makes it harder to evaluate what's actually true. The questions in this section are designed to move past marketing language and get to the architectural reality: how much can your team do independently, and what are the ongoing operational costs?

Architecture Questions

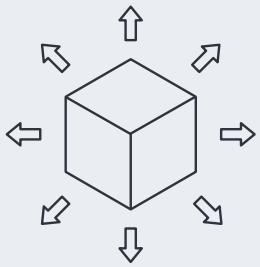
- Describe the platform's architecture. Is it truly API-first? What are the core services, and how are they decoupled?
- Can functionality be extended or customized without modifying the core platform? How are custom extensions managed during upgrades?
- How does the platform handle multi-tenant vs. single-tenant deployments? What are the trade-offs for our use case?
- What cloud infrastructure does the platform run on, and does the deployment model align with our organization's cloud strategy?
- How does the platform approach SLAs for uptime, performance, and support response?

Operational Support Questions

- What does day-to-day operational management of the platform look like for our internal team? What roles and skill sets are required?
- How are platform upgrades handled? Are they automatic, optional, or require manual migration?
- What monitoring, alerting, and observability tools are available to our operations team?
- What does the support model look like post-go-live? What is the escalation path for critical issues?

Section 5:

Fulfiller UI and In-Store Fulfillment Workflows



The Fulfiller UI is often where implementation gaps first surface. A platform that routes efficiently but gives fulfillment teams a poor interface will create operational friction, errors, and staff frustration whether those teams are working in a store, a distribution center, or a third-party warehouse. This section evaluates whether fulfillment tooling is a first-class capability across all location types, or a late-stage addition built primarily for one.

UI and Usability Questions

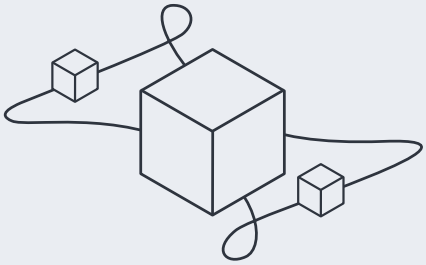
- Can we see the Fulfiller UI in a live or realistic demo environment, not a polished prototype?
- Does the Fulfiller UI provide a real-time dashboard that displays active fulfillment locations across all node types (stores, DCs, warehouses, and 3PLs) and can it be viewed as both a location map and a shipment list?
- Can the dashboard be filtered by location, shipment type, fulfillment step, and time period (e.g., last 24 hours, last week)?
- How does the interface surface SLA status at a glance? Does it visually indicate which shipments are on track versus at risk versus past due?
- How does the interface guide associates through each fulfillment workflow, such as Ship-to-Home, BOPIS, and curbside? Is it step-by-step guided or does it require training to navigate?
- How does the platform handle partial picks, substitutions, or out-of-stock scenarios during an active fulfillment workflow?
- Is the Fulfiller UI mobile-responsive or device-specific? What hardware does it require?
- How does the interface surface priority orders, deadlines, or SLA warnings to associates?

Configuration and Customization Questions

- Can fulfillment workflows be customized without developer involvement? What tooling supports this? Is it a Business Process Management (BPM) layer, a configuration UI, or something else?
- How are workflow updates deployed across locations? Is there a testing environment available?
- Can workflows differ by store, region, or fulfillment type within the same implementation?

Section 6:

Dropship and Vendor Network Management



Dropship adds meaningful revenue potential and assortment depth, but it also adds supply chain complexity. If the OMS isn't managing vendor routing, compliance, and visibility rigorously, that complexity shows up as delayed orders and customer service volume. This section identifies whether dropship is a mature capability or an underdeveloped one.

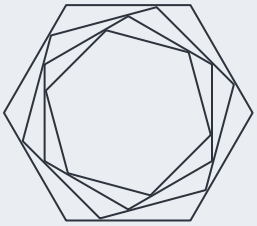
Vendor Management Questions

- How does the platform onboard new dropship vendors? What is the typical time to activate a new vendor?
- What compliance standards and SLA requirements can be configured and enforced at the vendor level?
- How does the platform handle vendor-specific routing preferences, lead times, and catalog restrictions?
- How are vendor performance metrics tracked and reported (i.e., on-time rate, fill rate, defect rate)?

Order Routing and Visibility Questions

- How does the platform route orders across a mixed-vendor network (first-party inventory, dropship, and 3PL) simultaneously?
- What visibility do merchants have into dropship order status after routing?
- How are vendor acknowledgment and order confirmation workflows managed?
- How does the platform handle vendor rejections or partial fulfillments?

Section 7:
Out-of-Box Integrations



Integration scope is one of the most underestimated cost and timeline drivers in OMS implementations. Pre-built connectors in critical areas reduce risk and accelerate go-live, but the quality of those integrations matters as much as their existence. This section tests both breadth and depth.

Integration Inventory Questions

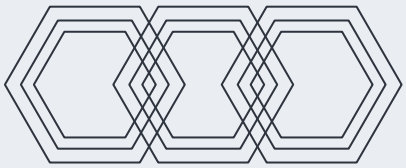
- For each of the following categories, ask: Does a pre-built integration exist? How is it maintained? What is the implementation timeline?
    - Product catalog (PIM, ERP)
    - Fulfillment locations (store systems, 3PLs, WMS)
    - Inventory feeds (ERP, WMS, supplier)
    - Order sources (ecommerce platform, marketplace, EDI, call center)
    - Triggered communications (email, SMS, post-purchase notifications)
    - Customer care platforms (CRM, service desk)
    - Returns and reverse logistics
    - Payment processing and settlement
    - Dropship and vendor management (EDI, vendor portals)
    - ERP and financial systems
    - Tax and compliance (Avalara, Vertex)
    - Shipping carriers and rate shopping (multi-carrier support, real-time rating)

Integration Quality Questions

- How are integrations maintained when third-party systems release updates or API changes?
- What is the support model for integration issues? Is this handled by the OMS vendor, the SI, or a shared responsibility?
- Are integrations event-driven or batch? What are the latency implications for real-time use cases?
- What does the integration development process look like for a connector that doesn't exist out of the box?

Section 8:

B2B-Specific Order Management Capabilities



B2B order management requires fundamentally different workflows than B2C. Purchase orders, net terms, account-based allocation, and complex shipping logic are standard operating requirements, not edge cases. Platforms built primarily for retail will often paper over these gaps in demos. This section surfaces them.

B2B Workflow Questions

- Does the platform natively support purchase order (PO) workflows, including PO creation, acknowledgment, and matching?
- How does the platform handle net terms, credit limits, and account-based payment workflows?
- Can inventory be allocated at the account level, for example, reserving specific stock for a key customer or dealer?
- Does the platform support ship-complete rules, where an order cannot ship until all line items are available?
- How are contract SLAs enforced within order management, and how are violations tracked?
- Does the platform support quote-to-order workflows natively, or does this require a separate CPQ integration?

Account and Catalog Management Questions

- How does the platform handle account-specific pricing within the order management workflow?
- Can catalog visibility be controlled at the account or buyer level?
- How does the platform manage multi-location B2B accounts where different ship-to addresses require different pricing, routing, or catalog access?

Section 9:

AI Strategy and Agentic Commerce Readiness



5:09 PMAI has become standard vocabulary in OMS marketing, which makes precision in evaluation essential. The questions in this section are designed to separate capabilities that are live in core workflows from those on a roadmap, and to assess agentic readiness: the platform's ability to operate as an intelligent, API-accessible fulfillment layer as autonomous buying behaviors scale.

Current AI Capability Questions

- Which AI capabilities are live in the platform today versus in development or planned?
- Where specifically is AI embedded in the platform? Routing optimization, inventory prediction, EDD calculation, fraud detection, demand forecasting?
- Can you show us an AI-driven capability in a live environment, not a prototype?
- What data does the platform's AI train on? Is it proprietary to each customer, pooled across the customer base, or both?
- How are AI-driven decisions auditable? Can operators see why a recommendation was made and override it when needed?

Agentic Commerce Readiness Questions

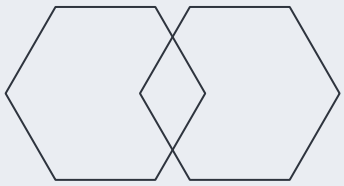
- How does the platform support agentic commerce flows, where AI agents place or manage orders programmatically on behalf of customers?
- Are core OMS capabilities, such as inventory availability, EDD, routing decisions, order status, exposed via API in a way that supports real-time, machine-speed queries?
- What API response time guarantees exist for inventory and EDD queries at peak load?
- How does the platform handle autonomous order execution, such as applying pricing rules, fulfillment logic, and business constraints, without requiring human confirmation at each step?
- How does the platform validate and process orders that originate from AI agents versus human buyers? Are there different authentication, rate limiting, or fraud logic requirements?
- If an AI agent submits an order that conflicts with a business rule (i.e., an allocation limit or a restricted product), how does the platform handle and communicate the exception?

Roadmap and Strategy Questions

- What is the vendor's overall AI and agentic commerce strategy, and who owns it internally?
- What AI or agentic capabilities are on the 12-month roadmap? What is the delivery confidence level on those items?
- How are AI capabilities validated? What benchmarks or outcome metrics do you share with customers?
- How does the vendor see the OMS role evolving as agentic buying behaviors become more prevalent?

Section 10:

Implementation Approach and Team



The OMS implementation is where vendor promises meet operational reality. A strong platform delivered by an under-resourced or misaligned implementation team is a common source of failed deployments. This section evaluates the full picture: vendor approach, SI quality, and deployment flexibility.

Implementation Model Questions

- What is the vendor's implementation methodology? What phases, milestones, and deliverables are standard?
- Does the vendor offer professional services, partner with SIs, or both? What is the recommended model for an implementation of our scope?
- If the recommendation includes an SI, what is the vendor's role during implementation (oversight, QA, embedded support)?
- How should we evaluate and select an SI partner? What criteria matter most for implementations like ours?

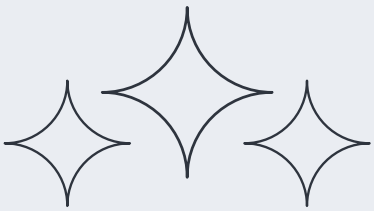
Flexibility and Phasing Questions

- Can the platform be deployed incrementally, for example, activating real-time inventory or order promising as a standalone capability before a full OMS migration?
- How has the vendor supported phased implementations for other clients? Can you provide an example?
- What is the typical go-live timeline for an implementation of similar scope to ours?

Risk and Accountability Questions

- What are the most common implementation failure points for this platform, and how does the vendor mitigate them?
- What does escalation look like if the implementation goes off track?
- What guarantees or remedies exist if go-live is delayed?

Section 11:
Accommodation of Unique Business Needs

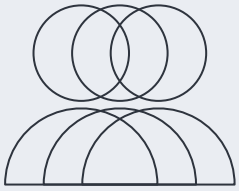


Every business has workflows that don't fit cleanly into a platform's default configuration. How a vendor responds to your unique requirements, and how honest they are about the limits of their configurability versus customization, is a reliable signal of the partnership you'll have post-go-live.

Requirements Fit Questions

- After reviewing our requirements, which are fully supported out of the box, which require configuration, and which would require custom development?
- For requirements that need customization, what is the development model? Who builds it, who owns it, and how is it maintained during upgrades?
- Are there requirements that the vendor would recommend we reconsider or align to platform best practices? Why?
- How has the platform been adapted for operational models similar to ours?

Section 12:
Differentiation of Providers



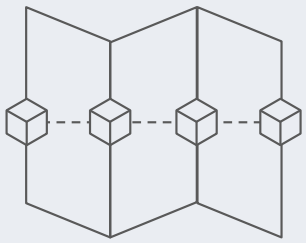
By the time you reach final vendor selection, most platforms will look broadly similar on feature checklists. The differentiation questions in this section are designed to surface what actually makes each vendor distinct, and to give vendors the opportunity to make their honest case.

Vendor Differentiation Questions

- What makes your platform genuinely different from your top three competitors, not in marketing language, but in architecture, capability, and customer outcomes?
- What types of businesses or use cases is your platform best suited for? Where does it excel most clearly?
- What are the honest limitations of your platform? What types of businesses or requirements are a poor fit?
- What partnerships, technology, carrier, or SI, provide meaningful capability advantages for your customers?
- What customer outcomes can you point to that you believe your competitors cannot replicate?

Section 13:

Product Roadmap and Customer Voice



The OMS you select today will need to evolve with your business. How the vendor manages product direction, and how much influence customers have over it, will determine whether the platform keeps pace with your needs or falls behind them.

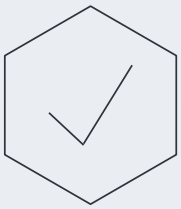
Roadmap Questions

- How is the product roadmap set? Who has input, and what drives prioritization decisions?
- Is there a customer product council or advisory board? How are members selected and how often does it meet?
- How do you communicate roadmap updates to customers, and how much lead time do customers get before major changes?
- What percentage of the roadmap reflects customer-requested capabilities versus internally driven innovation?

Customer Voice Questions

- How do customers submit feature requests, and how are those tracked and prioritized?
- Can you give an example of a customer-requested feature that made it into the platform in the last 12 months?
- What happens when a customer needs a capability that isn't on the roadmap?

Section 14:
Reference Checks



Reference checks are the most underutilized step in OMS evaluations. A well-structured reference conversation will surface more signal than a dozen vendor demos. Request references proactively and use the questions below to get beyond surface-level endorsements.

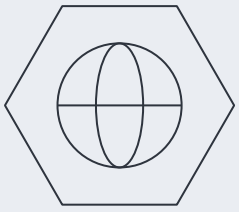
How to Request References

- Ask for at least two references from businesses with operational models similar to yours.
- Ask for at least one reference from a complex or challenging implementation.
- Ask whether any reference customers have moved off the platform, and why.

Reference Conversation Questions

- Why did you select this platform, and would you make the same decision today?
- How did the implementation compare to what was scoped and promised at the start?
- What has been the most challenging aspect of the platform since go-live?
- What does support look like day-to-day? How responsive is the vendor when issues arise?
- Has the platform kept pace with your business growth and changing needs?
- What do you wish you had asked during your evaluation that you didn't?
- Is there anything about your experience — positive or negative — that you think we should know?

One Final Consideration:
Cultural Fit



No evaluation framework fully captures the quality of the partnership you'll have with a vendor over five or more years. Throughout the process, pay attention to how the vendor team communicates, how they handle difficult questions, and whether they behave like a partner or a salesperson.

The best technology decision and the best partnership decision are not always the same choice. But when you can find both — a platform that genuinely fits your operational needs delivered by a team you trust — the result is an implementation that performs as promised and a relationship that compounds over time.

About KIBO

KIBO Commerce is a composable, enterprise-grade commerce platform that unifies order management, eCommerce, and subscription capabilities for retailers and B2B organizations. Trusted by leading brands to power complex, omnichannel fulfillment and commerce operations, KIBO enables businesses to deliver seamless customer experiences at scale. Headquartered in Austin, Texas, KIBO serves a growing portfolio of enterprise clients across retail, manufacturing, and distribution. Learn more at kibocommerce.com.

About Aries

Aries Solutions is a global solution implementer specializing in composable commerce and headless technologies. We are an accomplished commercetools North American partner, with the most live projects and the collective experience of forty implementations. We use this extensive knowledge to give you viable recommendations so you can move faster and more confidently. Aries Solutions has a proven track record of helping businesses scale, adapt, and own their digital commerce future.

Our ecommerce practice has launched customers of various sizes across B2C, DTC, and B2B. The developers and leaders working with you bring real-world experience and knowledge. We give you the confidence to launch commercetools successfully. Learn more about how Aries Solutions can help at https://www.ariessolutions.io/ or follow us on LinkedIn https://www.linkedin.com/company/aries-solutions/.

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