



NUCLEUS
RESEARCH

OMS Technology Value Matrix 2026

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The Bottom Line

In 2026, the order management systems market is defined by persistent supply chain volatility, the convergence of B2C and B2B commerce under unified commerce architectures, and the emergence of AI-driven orchestration as the defining capability that separates leaders from the rest of the field. Every platform evaluated in this year's Value Matrix has absorbed the principles of distributed order management, positioning the OMS as the connective orchestration layer between storefronts, warehouses, stores, carriers, and financial systems rather than a back-office order book. Agentic AI has moved from roadmap to production across the market, with platforms shipping agents that orchestrate exceptions, rebalance inventory, manage post-purchase changes, and serve as natural language interfaces for operators, buyers, and customer service teams. Returns and reverse logistics are now treated as a strategic pillar rather than an afterthought, with disposition automation, resale routing, and fraud detection becoming standard capabilities. Composable, API-first architectures with deep integration to WMS, TMS, SCP, ERP, POS, and CRM systems separate platforms that can anchor unified commerce from those that cannot. Leaders combine AI-driven decisioning, end-to-end omnichannel and B2B coverage, composable and unified architectures, and operator usability, positioning the OMS as the orchestration layer where commerce, fulfillment, and customer experience converge.

Market Overview

The order management systems (OMS) market in 2026 is being reshaped by increasing supply chain volatility, fulfillment complexity, and the continued convergence of physical and digital commerce. Organizations are managing a growing mix of direct-to-consumer, wholesale, marketplace, and store-based fulfillment models, often across distributed inventory networks and global supplier bases. At the same time, rising customer expectations for speed, accuracy, and transparency are placing additional pressure on operations teams to make faster and more precise fulfillment decisions. A defining trend in this environment is the convergence of B2C and B2B order management within unified platforms. Vendors that historically served omnichannel retail are now investing heavily in B2B capabilities, including hierarchical customer relationships, contract-driven ordering, account-level inventory segmentation, and multi-supplier orchestration. Conversely, B2B-focused vendors are expanding omnichannel retail capabilities and standardized B2B portals that bring consumer-grade experiences to wholesale buyers. The result is a market moving toward a single operational layer capable of managing every order type an enterprise handles, from a single-item consumer purchase to a multi-region wholesale contract.

In response to these pressures, OMS platforms are evolving from transactional systems into real-time orchestration layers, increasingly aligned with the principles of Distributed Order Management (DOM). Rather than simply capturing and routing orders, modern platforms continuously evaluate inventory positions, fulfillment capacity, delivery constraints, and service-level objectives to determine how and where orders should be fulfilled. This shift reflects a broader move toward systems that not only execute predefined rules but dynamically coordinate decisions across the network. As a result, OMS platforms are becoming central to balancing cost, service, and inventory utilization in real time, particularly in environments with distributed inventory and complex fulfillment paths.

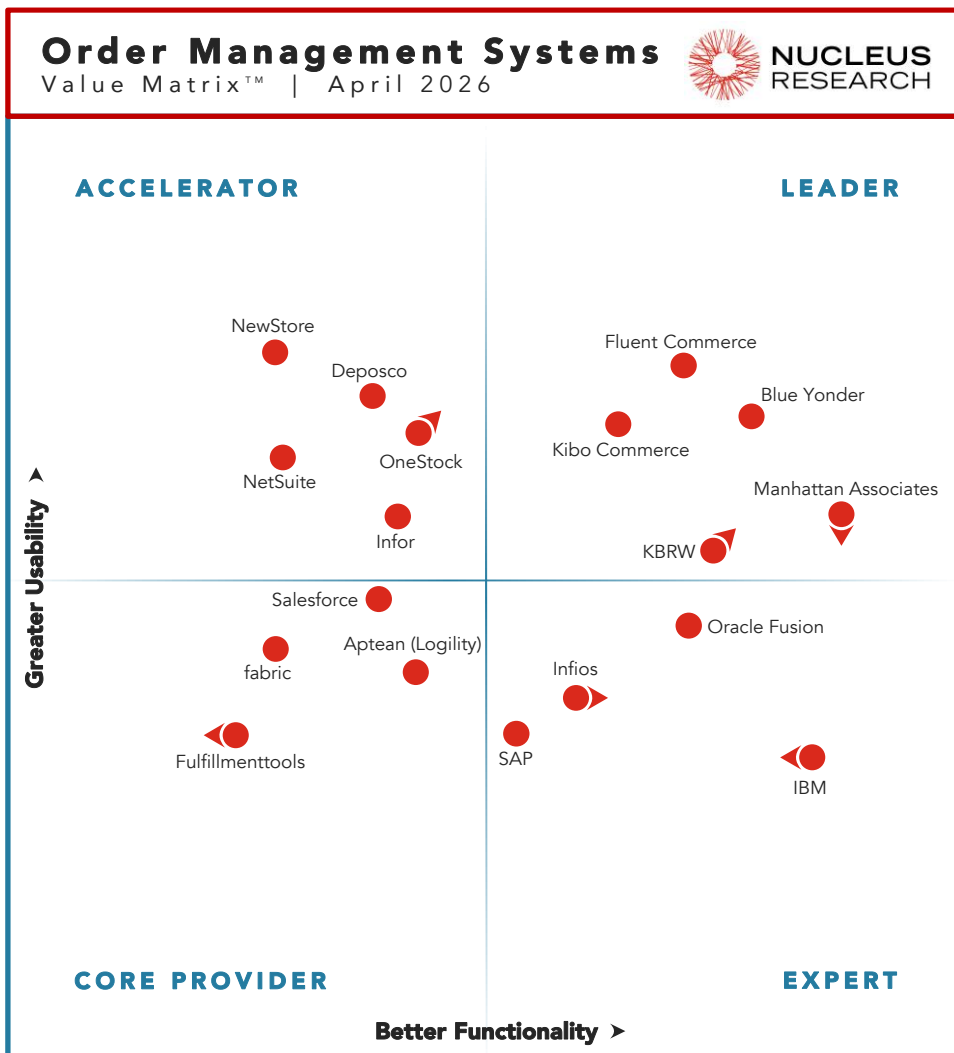
Over the past 12 to 24 months, artificial intelligence has become a focal point of vendor investment and market messaging, with nearly every OMS provider introducing or announcing AI-driven capabilities. While early positioning has often emphasized broad transformation narratives, the current phase of innovation is increasingly defined by tangible functionality. Every platform evaluated in this year's Value Matrix has shipped or planned agentic AI capabilities, including embedded operational agents for store associates and customer

OMS platforms are evolving into real-time orchestration layers that continuously evaluate inventory, capacity, and service-level objectives to decide how and where each order is fulfilled, rather than simply executing predefined rules.

The market is converging toward a single operational layer capable of managing every order type an enterprise handles, from a single-item consumer purchase to a multi-region wholesale contract.

service teams, natural-language interfaces for order creation and exception handling, and model context protocol servers that expose order data and workflows to enterprise agent ecosystems. These capabilities are beginning to support more practical use cases, such as automating exception resolution, guiding fulfillment decisions, and enabling faster interaction with order data, although adoption and maturity vary significantly across vendors.

Integration with WMS, TMS, SCP, ERP, POS, and CRM has become critical to OMS value, letting platforms operate on a unified view of inventory, orders, and customer data.



Returns management has moved from a back-office cost center to a strategic pillar of the OMS. Acquisitions and product investments across the market have folded returns routing, disposition decisioning, intelligent fraud prevention, and customer-facing self-service into the core order management workflow. Platforms are using machine learning to optimize return disposition based on transit time, markdown risk, and inventory position, with reported margin improvements of 30 to 50 percent over static rules. Returns are

increasingly managed alongside the outbound order as a single end-to-end lifecycle rather than a separate post-purchase process, and this shift is reshaping expectations for what an OMS must deliver.

Delivery promise accuracy and real-time fulfillment decisioning have emerged as primary differentiators. Platforms are calculating delivery commitments from live carrier performance, warehouse capacity, and distributed inventory rather than static lead times, and they are continuously tuning those promises against actual outcomes. Simulation engines, fulfillment sourcing simulators, and pre-live rule testing environments allow organizations to model routing and service level changes before deployment. In parallel, vendors are reporting production workloads at a scale that was uncommon only a few years ago, including billions of real-time SKU queries per peak season and SKU reservations completed in tens of milliseconds.

As OMS platforms take on a more central role in execution, their ability to integrate with complementary supply chain and enterprise systems has become critical to delivering value. Organizations are increasingly connecting OMS with warehouse management (WMS), transportation management (TMS), supply chain planning (SCP), enterprise resource planning (ERP), point-of-sale (POS), and customer relationship management (CRM) systems to enable more consistent and accurate decision-making. These integrations allow OMS platforms to operate on a unified view of inventory, orders, and customer data, improving fulfillment accuracy, accelerating exception resolution, and aligning planning decisions with execution realities. Vendors that can support these integrations through standardized APIs, composable architectures, or tightly unified platforms are better positioned to support end-to-end operational coordination.

These developments redefine the evaluation criteria for OMS platforms and the role of the operations, merchandising, and customer service teams that depend on them. The OMS is no longer assessed solely on its ability to capture an order and route it to a fulfillment node; it is now the orchestration layer where inventory decisions, fulfillment execution, returns management, and agent-driven operations converge. Vendors that lead in this year's Value Matrix are those combining AI-driven decisioning, deep omnichannel and B2B coverage, composable or unified architectures that match enterprise deployment patterns, and the usability required for operations teams to adapt rules and workflows at the pace retail change demands. Vendors positioned in the expert, accelerator, and core provider quadrants bring distinct strengths in enterprise scalability, vertical

Returns have shifted from post-sale afterthought to a strategic pillar of the OMS, with leading platforms treating disposition routing, resale placement, and fraud detection as native capabilities rather than bolt-ons.

Tariff shifts, carrier disruptions, and swinging demand have pushed the OMS from a back-office order book into the connective orchestration layer across storefronts, warehouses, stores, and carriers.

focus, or composable deployment that align with specific buyer requirements.

Leaders

Leaders in the OMS Technology Value Matrix include Blue Yonder, Fluent Commerce, KBRW, Kibo, and Manhattan Associates.

Blue Yonder

Blue Yonder is recognized as a leader in this year's Order Management Systems Value Matrix. The Blue Yonder OMS operates as an end-to-end, AI-driven system of execution that synchronizes inventory visibility, promise management, fulfillment orchestration, disruption management, and returns initiation and processing into a unified real-time decision fabric. Built on a composable, microservices-based architecture, the platform supports incremental adoption of capabilities, from intelligent commit management and inventory reservation to order rebalancing and returns, without requiring full-stack replacement, accelerating time-to-value and reducing implementation risk. During the 2025 peak season, the platform processed over one billion API calls, supported 444 billion SKU queries at 16-millisecond response times, and handled 18 million real-time SKU reservations in 30 milliseconds.

In addition to its strengths in omnichannel retail, Blue Yonder OMS is designed to address the structural complexity of enterprise B2B environments, including multi-region operations, hierarchical customer relationships, and contract-driven ordering patterns. The platform delivers time-phased inventory visibility with support for forward-looking commitments, along with advanced inventory segmentation ("fencing") to prioritize key accounts and channels. Intelligent rebalancing and real-time re-promising enable organizations to manage large, evolving wholesale orders while maintaining service levels. These capabilities are complemented by flexible order capture across channels and formats, and end-to-end lifecycle management that supports ongoing order modifications, exception handling, and operational constraints.

The platform embeds AI and machine learning (ML) natively across every core microservice, powering real-time closed-loop decisioning throughout the order lifecycle. Dynamic safety stock optimization, markdown prediction, stockout avoidance modeling, and autonomous delivery date promising operate through embedded ML logic, while agentic AI capabilities serve fulfillment operations and customer

During the 2025 peak season, a Blue Yonder deployment processed over one billion API calls and completed 18 million real-time SKU reservations in 30 milliseconds.

Doddle and Optoro acquisitions embedded ML-powered returns routing into the OMS, with 30 to 50 percent margin improvement over static disposition rules.

service teams with real-time order visibility, exception resolution, and automated sourcing recommendations. The acquisitions of Doddle and Optoro extend the platform into comprehensive end-to-end returns management, connecting returns routing, processing, and disposition to warehouse, transportation, and planning systems and positioning returns as a margin recovery opportunity rather than a cost center.

Recent product updates and enhancements include:

► **Doddle and Optoro Acquisitions**

Created end-to-end returns management capability within the OMS, including ML-powered smart routing that optimizes returned item disposition based on transit time, inventory position, and markdown risk, achieving 30 to 50 percent margin improvement over static rules.

► **Intelligent Rebalancer**

Automates inventory reallocations during disruptions such as shortages or demand spikes, ensuring margin-aware, service-level-aligned outcomes in real-time without manual intervention.

► **Fulfillment Sourcing Simulator**

Enables retailers to simulate and evaluate multiple sourcing scenarios in real-time, allowing teams to assess cost, speed, and margin trade-offs across fulfillment routes before committing to a sourcing strategy.

► **Agentic AI Fulfillment and Customer Service Agents**

Embedded AI agents for fulfillment operations managers and customer service teams provide real-time inventory visibility, proactive exception handling, AI-suggested responses, and automated sourcing recommendations integrated directly into operational workflows.

Fluent Commerce

Fluent Commerce is recognized as a leader in this year's Order Management Systems Value Matrix. The Fluent Order Management platform delivers cloud-native distributed order management for omnichannel retail, enabling organizations to manage real-time inventory, orchestrate fulfillment, and coordinate post-purchase workflows across all channels from a single platform. Built on an API-first, event-driven architecture, the platform supports multi-location inventory tracking across stores, warehouses, and distribution centers

Fluent's Model Context Protocol server launched in late 2025 exposes order management to enterprise AI agents with full validation and authorization controls.

with configurable workflows for click-and-collect, ship-from-store, drop-ship, and curbside pickup. The platform's modular design allows organizations to deploy targeted capabilities independently, reducing implementation scope and enabling incremental value delivery without requiring a full platform replacement.

Fluent Order Management centers on workflow configurability and rules-based orchestration, enabling operations teams to define and adjust fulfillment logic without engineering dependencies. The platform's distributed architecture separates orchestration logic from system-of-record infrastructure, enabling faster change cycles while reducing the risk associated with modifying core ERP or WMS systems. A Model Context Protocol server launched in late 2025 extends the platform's API-first design to support AI agent integration, enabling customer service AI systems to handle post-purchase order inquiries at scale with full validation and authorization controls.

Recent product updates and enhancements include:

► **Order Management MCP Server**

Middleware layer enabling AI agents to interact with Fluent Order Management for post-purchase inquiries and order operations at scale, including validation, authorization, and secure routing of AI-generated messages to backend order APIs.

► **Platform Performance Enhancements**

Optimization of core platform services, improving response times, throughput, and system efficiency for high-volume distributed order management operations.

► **Store and OMS User Experience Improvements**

Operational enhancements reducing configuration errors and improving cross-device usability, including device-specific default context configuration for store associate workflows.

KBRW

KBRW is recognized as a leader in this year's Order Management Systems Value Matrix. The KBRW OMS delivers enterprise-grade orchestration for complex omnichannel and B2B fulfillment environments, operating as a centralized execution command center that connects planning systems with real-time fulfillment operations across logistics networks, warehouse management systems, and transportation partners. The platform is architecturally designed to decouple fast-changing orchestration logic, allocation policies,

A distributed architecture separates orchestration logic from the ERP and WMS system of record, enabling faster change cycles without touching back-office systems.

KBRW's execution command center decouples fast-changing orchestration logic from stability-focused ERP and WMS systems, enabling faster fulfillment evolution.

exception rules, workflow variants, and integration behaviors from systems of record such as ERP and WMS, which are optimized for stability rather than frequent change. This decoupling enables IT teams to evolve fulfillment logic and integrate new channels without requiring deep customization of core back-office systems.

KBRW's execution command center consolidates signals from inventory movements, capacity constraints, shipment events, and operational exceptions, and applies orchestration logic to guide real-time decisions when disruptions occur. A feedback loop between execution outcomes and operational policies enables continuous improvement of service rules and fulfillment performance with documented decision traceability. KBRW serves enterprises in complex B2B and mixed B2B/B2C environments, with documented deployments at global organizations including Michelin and Stellantis Group. The platform is positioned as a best-of-breed orchestration layer capable of operating across heterogeneous technology landscapes, including legacy ERP systems, modern API-based services, and multi-partner logistics networks, with decision logic designed to enable agentic AI adoption.

Recent product updates and enhancements include:

▶ **B2B Capabilities Expansion**

Standardization of the B2B portal and expansion of B2B omnichannel flows, including system-to-system transaction support, B2B execution rule configuration, no-code promise setup, and multi-supplier management and customer-supplier relationship handling.

▶ **Smart Steering and Order-Level Alerting**

Strengthened alerting to the individual order level, enabling operations teams to tag orders exhibiting undesired behaviors and prioritize follow-up, with expanded standardized KPI packaging and simulation tools to test execution and availability assumptions before deployment.

▶ **Integration Platform Enhancements**

Expanded business process-driven orchestration and low and no-code configuration patterns for cross-system workflows and exception paths, alongside strengthened disaster recovery capabilities and technical monitoring and alerting improvements.

Deployments at global enterprises including Michelin and Stellantis Group demonstrate KBRW's depth in complex B2B and mixed B2B/B2C fulfillment networks.

Kibo Commerce

Kibo Commerce is recognized as a leader in this year's Order Management Systems Value Matrix. The Kibo Order Management platform delivers composable, API-first order management for B2C and B2B commerce, combining omnichannel fulfillment orchestration, multi-location inventory management, and returns processing within a unified, headless architecture. The platform supports complex inventory allocation, real-time delivery promising, and order routing across stores, warehouses, and third-party logistics partners, with native support for curbside pickup, buy-online-pick-up-in-store, and ship-from-store fulfillment models. Kibo's composable design enables organizations to deploy order management capabilities independently or as part of a broader unified commerce platform that also includes ecommerce, subscriptions, and pricing.

The platform serves both B2C retailers and B2B distributors, with capabilities spanning order splitting, partial shipments, backorder management, and contract pricing for wholesale operations. Agentic commerce capabilities introduced in 2025 automate content operations and provide centralized agent performance management across the order lifecycle. Advanced reverse logistics functionality integrates returns from initiation through financial resolution, with intelligent return routing, disposition mapping, and fraud prevention embedded directly in the order management workflow to minimize post-purchase friction.

Recent product updates and enhancements include:

- ▶ **Comprehensive Reverse Logistics**

Launched intelligent return routing, disposition mapping, and custom return rules by product or customer segment, integrating returns management from initiation through financial resolution with embedded fraud prevention capabilities.

- ▶ **Agentic Commerce and Agent Administration Dashboard**

Delivered a Merchandiser Agent automating content generation and translations alongside an Agent Administration Dashboard for centralized management of agents, playbooks, and performance metrics.

- ▶ **Advanced Fulfillment Optimization**

Introduced partial backorder release for accelerated fulfillment, multi-location consolidation for network optimization, and

Kibo's composable, API-first architecture lets retailers deploy order management independently or alongside its ecommerce, subscription, and pricing modules.

An Agent Administration Dashboard centralizes management of Kibo's Merchandiser Agent and customer playbooks, giving operations teams a single view of agent performance.

automatic order redirection to surplus stock locations for excess inventory management.

Manhattan Associates

Manhattan Associates is recognized as a leader in this year's Order Management Systems Value Matrix. Manhattan Active Order Management delivers enterprise-grade unified commerce for large-scale omnichannel retailers, combining fulfillment orchestration, inventory management, point-of-sale, and customer engagement within a single continuously updated cloud platform. The platform orchestrates complex order flows across stores, distribution centers, drop-ship suppliers, and third-party logistics partners with real-time inventory availability and delivery promising across all channels. Manhattan's unified commerce approach eliminates the traditional separation between order management, point-of-sale, and customer service systems, enabling a single platform to serve all execution touchpoints across the retail operation.

The platform embeds real-time analytics and AI capabilities directly within the fulfillment workflow, giving operations teams actionable insights without requiring separate analytics infrastructure. A simulation engine allows retailers to model fulfillment strategies and replay historical orders to evaluate the impact of routing rule changes before deployment, while peer benchmarking capabilities provide contextual KPI comparisons against industry cohorts. An AI agent workforce commercially released in Q1 2026 delivers embedded intelligence for store associates, contact center teams, and OMS configuration workflows, with a no-code and low-code agent development environment enabling organizations to build purpose-specific agents on the Manhattan platform.

Recent product updates and enhancements include:

► AI Agent Workforce

Commercial availability of Store Associate Agent, Contact Center Agent, and OMS Configuration Agent embedded within Manhattan Active Omni, providing natural-language order and fulfillment interaction and enabling customers to build custom agents through Manhattan Agent Foundry using no-code and low-code tools.

► Fulfillment Optimization Simulation Engine

Enables retailers to model and compare fulfillment strategies, run scenario analyses, and replay historical orders to evaluate the cost,

Manhattan's Q1 2026 AI agent workforce includes Store Associate, Contact Center, and OMS Configuration Agents embedded within Manhattan Active Omni.

A unified commerce architecture collapses order management, point-of-sale, and customer service into a single continuously updated cloud platform.

speed, and KPI impact of different routing approaches before deployment.

► **Real-Time Sales and Fulfillment Insights Dashboard**

Embedded analytics providing real-time visibility into sales, inventory, returns, and customer behavior accessible across the Active Omni platform without requiring separate analytics tools.

Experts

Experts in the OMS Technology Value Matrix include Aptean (Logility), IBM Sterling Order Management, Infios, Oracle Fusion, and SAP.

Aptean (Logility)

Aptean is recognized as an expert in this year's Order Management Systems Value Matrix. Aptean delivers order management and fulfillment capabilities as part of an AI-first supply chain decision intelligence platform, integrating demand planning, inventory optimization, and order execution within a unified analytical environment. The platform positions order management not as a standalone transaction system but as an execution layer tightly coupled with supply chain planning, using AI to connect demand forecasts with real-time fulfillment decisions across the inventory network. This integration makes Aptean particularly effective for organizations where fulfillment accuracy depends heavily on upstream demand and supply visibility.

Aptean's intelligent order response capabilities use AI to monitor inventory positions and demand signals in real-time, identifying demand-supply imbalances and triggering automated allocation adjustments before they affect service levels. The platform serves mid-market to enterprise organizations in distribution, manufacturing, and retail where tight integration between supply chain planning and order execution is a key selection criterion. Aptean acquired Logility in April 2025, adding complementary supply chain management technologies and expanded go-to-market reach for integrated order management and fulfillment operations.

Recent product updates and enhancements include:

► **Intelligent Order Response**

AI-powered capability that actively monitors demand-supply positions to identify and automatically address imbalances in real-

Acquisition of Logility in April 2025 expanded Aptean's go-to-market reach for integrated order management and supply chain operations.

Aptean positions order management as an execution layer tightly coupled with planning, using AI to link demand forecasts to real-time fulfillment decisions.

time, optimizing order allocation and fulfillment outcomes without manual intervention.

► **Continuous Network Optimization**

AI-driven recommendations for incremental supply chain network adjustments, automating realignment of the operating model based on actual execution data and forecasted demand patterns.

► **Aptean Acquisition**

Aptean's April 2025 acquisition of Logility integrated complementary supply chain management technologies and expanded the platform's capabilities for end-to-end order management and fulfillment operations.

IBM Sterling Order Management

IBM Sterling Order Management is recognized as an expert in this year's Order Management Systems Value Matrix. Sterling OMS serves large enterprises in retail, distribution, and manufacturing with high-availability order orchestration at enterprise scale, supporting complex multi-channel order flows including B2B, B2C, and mixed-channel environments with global fulfillment, trade compliance, and multi-enterprise order collaboration. The platform handles order splitting, partial shipments, multi-enterprise fulfillment networks, and supplier integration across hundreds of fulfillment nodes, with a transaction processing architecture designed for sustained high-volume operations. IBM has invested in modernizing Sterling with cloud-native infrastructure, AI capabilities, and enhanced observability tooling, bringing platform capabilities forward while preserving the stability and implementation depth that large enterprise deployments require.

A suite of AI agents launched in Q1 2026 addresses core order management workflows including information retrieval, exception handling, and inventory segmentation, with explainable AI decision tracing designed to support compliance requirements by documenting automated decisioning logic. The platform's integration with IBM's broader ecosystem, including supply chain visibility, watsonx AI services, and cloud infrastructure, positions Sterling as a foundational component of enterprise-scale supply chain operations. IBM Sterling's architecture is optimized for large enterprise deployments where proven scalability, B2B order complexity, and multi-enterprise coordination are the primary selection drivers.

Recent product updates and enhancements include:

A Q1 2026 agentic AI toolkit gives IBM Sterling explainable AI decisioning with full traceability of every automated order management action.

Integration with watsonx AI services and supply chain visibility positions Sterling as a foundational layer for enterprise-scale supply chain operations.

► **Agentic AI Toolkit**

General availability of AI agents for order information retrieval, coupon enforcement, order cancellations, inventory segmentation, and contract risk assessment, with explainable AI decisioning providing full traceability of every automated decision.

► **Returns Management Enhancements**

End-to-end returns processing improvements including support for attaching sales orders to returns, modifying shipping addresses post-submission, and viewing detailed charges and refunds from a unified interface.

► **Modern Platform Infrastructure**

Customizable call center portlets for personalized agent workspaces, OpenSearch-enhanced observability, JDK 21 support, and commerce connectivity enhancements with flexible surcharge configuration.

Infios integrates order management, warehouse management, and transportation management under one brand, differentiating from standalone OMS solutions.

Infios

Infios is recognized as an expert in this year's Order Management Systems Value Matrix. Rebranded in March 2025 from Körber Supply Chain Software to Infios, the company delivers an integrated supply chain execution suite combining order management, warehouse management, and transportation management for global enterprises in logistics, distribution, and manufacturing. The Infios Order Management platform serves as the connective layer between demand signals and physical fulfillment operations, enabling coordinated execution across the full supply chain network through tight integration with warehouse capacity, transportation routing, and returns processing. This integration between order routing decisions and physical operations differentiates Infios from standalone OMS solutions and makes the platform particularly effective for enterprises operating complex multi-node fulfillment networks.

A 2025 AWS partnership is embedding generative AI agents into Infios Order Management to automate ETA updates, document verification, and transactional work.

Building on established strength in warehouse management systems, Infios is extending that core capability into a more comprehensive order management layer supported by AI-driven automation. A partnership with AWS initiated in 2025 targets integration of generative AI agents into Infios Order Management, designed to automate repetitive transactional tasks including ETA updates and document verification to free operations teams for exception management and higher-value work. The platform delivers its highest value to enterprises where order management decisions are tightly coupled with warehouse capacity and transportation constraints, and

where end-to-end supply chain execution integration creates advantages over standalone OMS deployments.

Recent product updates and enhancements include:

► **AWS Generative AI Partnership**

Initiated partnership with AWS in 2025 to integrate generative AI agents into Infios Order Management, targeting automation of transactional tasks including ETA updates and document verification to allow operations teams to focus on exception management and strategic optimization.

► **Infios Rebrand and Platform Strategy**

Rebranded from Körber Supply Chain Software to Infios in March 2025, reflecting a unified platform strategy connecting order management, warehouse management, and transportation management under a single brand identity.

► **AI-Driven Order Operations Automation**

Expanded focus on AI agents for handling repetitive order management processes, reducing manual transactional workload and enabling operations teams to concentrate on exception-driven and higher-value activities.

Oracle Fusion

Oracle Fusion is recognized as an expert in this year's Order Management Systems Value Matrix. Oracle Fusion Cloud Order Management delivers enterprise-grade order orchestration for global, multi-channel operations, integrating with Oracle Fusiob's broader ERP and supply chain management suite to provide end-to-end order-to-cash visibility. The platform supports multi-source fulfillment, global availability promising, and real-time exception management across distribution centers, retail locations, and contract manufacturers, with deep integration to Oracle Procurement, Inventory Management, and Financial Cloud for organizations operating complex, multi-system environments. Oracle Fusion's continuous release cadence delivers multiple capability updates annually, with AI agent innovation increasingly central to the platform's recent development trajectory.

Multiple purpose-built AI agents introduced across Oracle Fusion's 2025 and 2026 platform releases address critical automation opportunities in the order lifecycle, from document-based order entry through exception resolution. The Order Exception Agent, Sales Order Assistant, and Purchase Order to Sales Order Converter Agent

Oracle Fusion's Purchase Order to Sales Order Converter Agent automates conversion of purchase order PDFs to sales orders for high-volume B2B

Fusion Cloud Order Management delivers its strongest value to buyers already invested in Oracle's ERP and supply chain ecosystem.

represent Oracle's commitment to automating high-volume, repetitive order management tasks that consume operations team capacity at scale. Oracle Fusion Cloud Order Management delivers its strongest value to organizations already invested in Oracle's ERP and supply chain ecosystem, where deep integration across procure-to-pay and order-to-cash processes creates compounding advantages over standalone OMS deployments.

Recent product updates and enhancements include:

► **Purchase Order to Sales Order Converter Agent**

AI agent automating conversion of purchase order PDFs to sales orders, reducing manual entry effort and error rates for high-volume B2B order intake scenarios.

► **Order Exception Agent Expansion**

Enhanced monitoring, diagnosis, and automated resolution of order exceptions with broader coverage and real-time intervention capabilities in the Fusion Cloud 26A release.

► **Sales Order Assistant Agent**

Natural language interface enabling teams to create and manage sales orders through conversational AI interaction, reducing training time and improving accessibility for order management operations.

SAP

SAP is recognized as an expert in this year's Order Management Systems Value Matrix. SAP Order Management Services delivers omnichannel order fulfillment orchestration for enterprise retailers and B2B organizations operating within the SAP ecosystem, integrating with S/4HANA, SAP Commerce Cloud, and SAP Logistics to provide end-to-end order visibility and fulfillment coordination. The platform handles multi-channel order capture, fulfillment sourcing, real-time inventory promising, and post-order management including returns and exchanges, with the ERP integration depth that SAP customers require for financial, compliance, and procurement alignment. SAP's subscription order management capabilities extend the platform into recurring services, consumption-based models, and SaaS business scenarios.

SAP has integrated its Joule AI copilot into order management operations, enabling natural language access to order data and operational insights across the platform. A planned Order Reliability

SAP's Joule AI copilot, announced at NRF 2026, brings natural-language access to order data, analyses, and operational insights across Order Management Services.

A planned Order Reliability Agent is designed to proactively flag stock, status, and fulfillment risks before they reach the customer.

Agent is designed to proactively identify and address potential order issues before customer impact, representing SAP's direction toward autonomous order exception management. The platform delivers its highest value to large enterprises committed to the SAP ecosystem, where deep integration with procurement, financial accounting, and supply chain execution creates compounding ROI advantages that standalone OMS solutions cannot replicate.

Bright Suite unifies OMS, WMS, and planning for mid-market brands and third-party logistics providers.

Recent product updates and enhancements include:

► **Joule AI Copilot Integration**

Joule AI copilot, announced at NRF 2026, available for order management to enable natural language access to order data, analyses, and operational insights with integrated visual display.

► **Order Reliability Agent**

Planned AI agent designed to proactively identify and address potential order issues, helping operations teams monitor order status, stock availability, and fulfillment risks before customer impact, to be available within SAP Order Management Services.

► **Subscription Order Management 2025 FPS01**

Major release strengthening subscription lifecycle management, improving Fiori usability, enabling phased contract management through the UI, and extending API capabilities for recurring services and subscription-based business models.

Accelerators

Accelerators in the OMS Technology Value Matrix include Deposco, NetSuite, NewStore, and OneStock.

Deposco

Deposco is recognized as an accelerator in this year's Order Management Systems Value Matrix. The Deposco Bright Suite delivers integrated order management, warehouse management, and supply chain planning for mid-market omnichannel brands and third-party logistics providers on a unified platform. The platform's productized integration with Shopify and Shopify POS reduces implementation complexity for mid-market brands without extensive technical resources, while native B2C and B2B order flow support enables growing brands to manage retail and wholesale operations within a single system. Multi-business unit support enables third-party logistics

operators to manage multiple brands on one Deposco instance with isolated data, permissions, and feature access.

Deposco's value lies in connecting order management, warehouse execution, and supply chain planning within a unified system for mid-market organizations that need operational depth without enterprise implementation complexity. The Bright Suite model eliminates integration overhead between OMS, WMS, and planning, enabling real-time data sharing across the operational stack. The platform primarily targets fast-growing brands and third-party logistics providers in the 50 to 5,000 employee range, where simplicity, rapid deployment, and out-of-the-box Shopify connectivity deliver more immediate value than the deep customization available in enterprise-grade platforms.

Recent product updates and enhancements include:

► **Mobile Store Picking Enhancements**

Reworked mobile store picking to include larger product images for easier item identification and a scrollable item card list enabling associates to pick in any order, reducing dependency on secondary devices during fulfillment.

► **Flexible Cycle Count Capabilities**

Simultaneous multi-user cycle counting with seamless task switching, improving inventory accuracy workflows and reducing the time required to complete counts in active fulfillment environments.

► **Estimated Delivery Date API**

New API enabling display of estimated delivery dates on product detail pages, with client implementations reporting estimated four to 10 percent conversion rate improvements, and a follow-on Shopify app planned for checkout display.

NetSuite

NetSuite is recognized as an accelerator in this year's Order Management Systems Value Matrix. NetSuite, owned by Oracle, delivers integrated order-to-cash capabilities within its cloud ERP platform, combining order entry, inventory management, and fulfillment coordination with financial management, CRM, and ecommerce in a unified system. The platform serves SMB and mid-market organizations that prioritize operational consolidation over OMS specialization, providing a single platform for order

NetSuite's shared data model across order management, financial accounting, and inventory removes the reconciliation overhead common in multi-system architectures.

management, financial reporting, and inventory control without requiring standalone OMS infrastructure. NetSuite's order management capabilities span multi-channel order intake, multi-location inventory tracking, fulfillment routing, and returns management for organizations operating warehouses, retail locations, and drop-ship arrangements.

NetSuite's primary differentiation is its broad integration across business operations rather than deep OMS specialization. Customers benefit from a shared data model across order management, financial accounting, and inventory, eliminating the reconciliation overhead common in multi-system architectures. The platform is particularly effective for companies transitioning from standalone ecommerce or ERP tools to an integrated operational environment, where consolidating systems and improving data consistency generate the highest operational value. Two annual releases, typically in spring and fall, deliver continuous platform improvements, with the 2025 and 2026 releases adding advanced pricing capabilities and consignment inventory support.

Recent product updates and enhancements include:

- ▶ **Advanced Pricing Engine with AI Summaries**
Rules-based pricing engine with AI-generated pricing summaries enabling managers to make data-driven pricing decisions with consistent rule enforcement across multi-channel order scenarios.
- ▶ **Native Consignment Inventory Support**
New capability allowing management of consignment inventory directly within NetSuite Order Management, expanding fulfillment model support for consignment-based retail and distribution operations.
- ▶ **Enhanced Order Fulfillment Location Assignment**
Improved visibility into automatic location assignment for sales orders, with greater transparency into how location assignment rules are evaluated per item.

NewStore

NewStore is recognized as an accelerator in this year's Order Management Systems Value Matrix. The NewStore platform delivers omnichannel-as-a-service for mid-market premium and specialty retailers, combining a mobile-native store associate application, order management, inventory management, clienteling, and point-of-sale

Two annual releases in spring and fall added advanced pricing and native consignment inventory support across the 2025 and 2026 cycles.

NewStore's iPhone-native Associate App consolidates pick, pack, ship, BOPIS, returns, and clienteling workflows onto a single mobile device.

within a single cloud platform. The platform's iPhone-native associate application enables store teams to manage pick, pack, ship, buy-online-pick-up-in-store, returns, and clienteling workflows from a single mobile device, reducing the physical infrastructure complexity associated with traditional store fulfillment systems. NewStore targets premium fashion, lifestyle, and specialty retail brands seeking a modern, mobile-first replacement for legacy in-store systems that also serves as their distributed order management platform.

NewStore's order management capabilities support real-time inventory visibility across stores and distribution centers, with configurable routing rules for fulfillment node selection based on availability, capacity, customer service levels, and geographic proximity. The platform's SaaS delivery model reduces implementation timelines relative to enterprise OMS solutions, with managed upgrades eliminating the maintenance overhead of on-premises deployments. NewStore's store-centric approach makes it particularly effective for brands where physical retail locations serve as primary fulfillment nodes and where store associate experience is a primary driver of operational performance.

Recent product updates and enhancements include:

▶ **Cycle Count Inventory Management**

New cycle count capabilities enabling retailers to audit inventory across stores and configure counts for consistent product lists across countries or selected store groups, improving inventory accuracy and reducing shrinkage across distributed store networks.

▶ **Service Levels for Order Priority**

Service level APIs enabling retailers to define priority service levels for orders, with priority orders flagged visually in the Associate App to support service-level-differentiated fulfillment workflow management.

▶ **Fulfillment Request API Enhancement**

New routing rule set API and support for a rescinded rejection reason in the Fulfillment Request API, enabling retailers to reject items and reroute without triggering availability changes, improving flexibility in fulfillment exception workflows.

Service Level APIs let retailers flag priority orders visually in the Associate App for service-level-differentiated fulfillment workflows.

OneStock

OneStock is recognized as an accelerator in this year's Order Management Systems Value Matrix. OneStock delivers a distributed order management platform with particular depth in delivery promise accuracy and omnichannel inventory orchestration, serving European and global retailers from production environments in EMEA, Asia, and North America. The platform's delivery promise engine calculates accurate delivery estimates in real-time, incorporating carrier performance data, warehouse capacity, and inventory position to generate commitments aligned with actual fulfillment capabilities rather than static lead time assumptions. OneStock's inventory unification layer consolidates stock positions across stores, warehouses, and distribution centers, enabling retailers to fulfill from any node while managing availability commitments accurately across all channels.

The platform supports store fulfillment, click-and-collect, ship-from-store, drop-ship, and marketplace integration through configurable orchestration that incorporates cost, speed, margin, and carbon objectives into routing decisions. OneStock's multi-region production environments in EMEA, Asia, and North America support data residency requirements for international retailers. Ongoing investments in global carrier integration and US and Canadian tax compliance are broadening the platform's applicability for retailers expanding internationally.

Recent product updates and enhancements include:

- ▶ **Delivery Promise Engine Upgrade**

Reworked delivery promise engine to handle 10 times previous request volumes at maintained low latency, with a redesigned configuration interface, dynamic carrier metadata support, and automated customer notifications on delivery date changes.

- ▶ **AI-Powered Fulfillment Intelligence**

Introduced Promise Accuracy Optimization through dynamic fine-tuning of delivery estimates based on carrier and warehouse performance data, alongside Intelligent Fulfillment Orchestration with automatic rerouting of at-risk orders and margin-optimization routing.

- ▶ **Global Infrastructure and Carrier Expansion**

Added production environments across EMEA, Asia, and North America for reduced regional latency, expanded carrier

OneStock's upgraded delivery promise engine handles 10 times previous request volumes while maintaining low latency.

Configurable orchestration balances cost, speed, margin, and carbon objectives in routing decisions across store, ship-from-store, drop-ship, and marketplace fulfillment.

integrations including DHL, Mondial Relay, GLS, Uber Direct, SF Express, and StarTrack, and Avalara Tax Connector support for US and Canada..

Core Providers

Core Providers in the OMS Technology Value Matrix include fabric, Fulfillmenttools, Infor, and Salesforce.

fabric

fabric is recognized as a core provider in this year's Order Management Systems Value Matrix. The fabric platform delivers a cloud-native, API-first order management system as a native component of a composable commerce suite, integrating order orchestration, distributed inventory management, dropship fulfillment, and store fulfillment within a single modular architecture. Designed for mid-market and enterprise direct-to-consumer and B2B retailers, the platform connects orders and inventory across digital, physical, and marketplace channels without requiring replacement of existing infrastructure. Customers including ESW, Brooklinen, and Chico's use fabric to operate omnichannel commerce, with the platform's composable design enabling selective adoption of OMS capabilities alongside product information management, pricing, and promotions modules.

fabric delivers its clearest value for retailers pursuing composable commerce modernization who need order management natively integrated with storefront and catalog capabilities rather than deployed as a standalone system. The platform's integration between order orchestration and product and pricing data reduces the middleware and integration overhead typically associated with discrete OMS deployments, making it well suited to growing direct-to-consumer and specialty retailers investing in headless architecture. The OMS supports omnichannel fulfillment routing across owned warehouses, third-party logistics providers, and vendor dropship relationships within unified fulfillment rules, and its availability on AWS Marketplace and partnerships with global commerce operators such as ESW extend its reach across cross-border commerce use cases. fabric competes less on the depth of advanced fulfillment optimization logic than on its composable deployment model and native cohesion with broader commerce functionality.

Recent product updates and enhancements include:

fabric's Smart Order Routing scores fulfillment locations in real time across inventory, capacity, cost, and delivery promise with no-code rule configuration.

Composable integration between order orchestration and product and pricing data reduces the middleware overhead of discrete OMS deployments.

► **Smart Order Routing**

This AI-powered routing engine scores fulfillment locations in real time across inventory availability, carrier capacity, cost, and delivery promise, then selects the optimal source for each order. A no-code configuration interface allows operations teams to build and adjust routing logic without engineering resources, and a pre-live simulation mode lets teams test rule changes against historical order data before deploying to production.

► **Store Fulfillment App**

Native application that equips store associates with a unified interface for BOPIS and ship-from-store workflows, covering pick, pack, and ship task management, real-time in-store inventory lookup, point-of-sale sync, and exception handling. The dual iOS and browser deployment model allows retailers to roll out store fulfillment capabilities without additional hardware procurement.

► **Fulfillment Rule Engine and Inventory Zones and Regions**

The low-code rule engine enables automatic order reallocation and cancellation during fulfillment disruptions such as location outages, stockouts, and weather events, reducing manual intervention in exception scenarios. The paired Inventory Zones and Regions framework applies geography-aware prioritization to ship-from-location selection, allowing retailers to define regional fulfillment hierarchies and reduce average shipping distance.

A 2025 USD 17 million investment from REWE Group is accelerating Fulfillmenttools platform development and international expansion.

Fulfillmenttools

Fulfillmenttools is recognized as a core provider in this year's Order Management Systems Value Matrix. The fulfillmenttools platform delivers cloud-native distributed order management for omnichannel retailers, focusing on the digitalization of fulfillment operations from available-to-promise through picking, packing, shipping, and returns across multi-channel environments. Built as a modern, API-first platform developed in Germany, fulfillmenttools serves mid-market to enterprise retailers primarily in the EMEA region, connecting inventory and orders across multiple countries, online channels, physical stores, and marketplaces within a flexible distributed order management architecture. The platform is designed as an orchestration layer that operates above existing ERP and WMS infrastructure, enabling retailers to add distributed order management capabilities without replacing core systems.

An API-first orchestration layer operates above existing ERP and WMS infrastructure so retailers can add distributed order management without replacing core systems.

Fulfillmenttools addresses the complexity of distributed fulfillment networks through configurable routing, multi-location inventory

visibility, and fulfillment execution coordination across stores and distribution centers. REWE Group invested USD 17 million in fulfillment tools in 2025 to accelerate platform development and international market expansion. The platform's cloud-native architecture and growing EMEA customer base position it as an emerging option for European retailers seeking a modern distributed order management layer, with continued capability development and market expansion underway.

Recent product updates and enhancements include:

► **No-Code Routing Flow Configuration**

Routing engine with no-code and low-code configuration UI enabling operations teams to create and customize order routing logic without engineering resources, improving operational agility for multi-location fulfillment environments.

► **Thalia Deployment**

Deployed at Thalia, the leading German-language bookseller, to increase omnichannel efficiency, improve inventory availability and service levels, and enable ship-from-store capabilities across the retailer's logistics network.

Industry-specific CloudSuite variants for distribution, fashion, and other verticals include pre-configured order management workflows and data models.

Infor

Infor is recognized as a core provider in this year's Order Management Systems Value Matrix. Infor delivers order management capabilities as an integrated component of its CloudSuite ERP platform, serving mid-market to enterprise organizations in distribution, manufacturing, and retail with industry-specific cloud suites that combine order management with financial management, procurement, and supply chain modules. CloudSuite variants for distribution, fashion, and other verticals include pre-configured order management workflows and industry data models designed to reduce implementation effort for organizations in specific verticals. Infor's order management functionality targets organizations seeking integrated ERP with embedded order capabilities rather than a specialized, best-of-breed omnichannel OMS.

Infor's CloudSuite platform integrates order entry, inventory management, and fulfillment coordination within a broader enterprise system of record, with AI capabilities available through the embedded GenAI Assistant. The platform performs best for mid-market and enterprise organizations in distribution and manufacturing where ERP consolidation and industry-specific process support are primary

Infor's GenAI Assistant delivers business-object-specific agents for customer service managers, providing conversational access to order data.

selection drivers, and where order management requirements are met by integrated ERP functionality rather than specialized omnichannel orchestration. Recent investment in GenAI capabilities and order-to-cash automation reflects Infor's focus on reducing manual effort across the order lifecycle.

Recent product updates and enhancements include:

► **GenAI Assistant with Order Management Agents**

Business object-specific AI agents for customer service managers providing comprehensive order visibility and management, enabling conversational access to order data to optimize workflows and reduce processing errors.

► **Automated Invoice Processing with AI and RPA**

Automated order-to-cash invoice flows using AI and robotic process automation to import documents, match purchase orders to line items, and handle exceptions, providing a unified processing funnel for expense and trade invoices.

Salesforce

Salesforce is recognized as a core provider in this year's Order Management Systems Value Matrix. Salesforce Order Management delivers fulfillment orchestration as a native component of Salesforce Commerce Cloud, connecting order capture, post-purchase workflow management, and customer service within the Salesforce Customer 360 ecosystem. The platform supports multi-channel order fulfillment, real-time inventory visibility, order routing, and returns management for organizations operating B2C ecommerce on Salesforce Commerce Cloud, providing a unified data model across commerce, order management, and service without requiring a separate OMS integration layer. Salesforce Order Management's primary value lies in its native ecosystem integration rather than standalone fulfillment optimization depth.

The platform's declarative configuration tools and Salesforce admin tooling make it accessible to operations teams with existing Salesforce skills, reducing the need for specialized OMS implementation expertise. Salesforce Order Management is suited to retailers and brands that prioritize unified customer data and post-purchase service integration over deep supply chain optimization or multi-node warehouse management. Planned improvements in the Spring 2026 release include automatic location rerouting for capacity-constrained

Agentforce is bringing AI agents for post-purchase inquiries and order status workflows into Salesforce Commerce Cloud and Order Management.

Declarative admin tooling makes the platform accessible to operations teams with existing Salesforce skills, reducing OMS implementation specialization needs.

locations and refined financial adjustment calculations for post-order accuracy.

Recent product updates and enhancements include:

▶ **Automatic Location Rerouting**

Planned for Spring 2026, enables operations managers to remove fulfillment locations lacking required products or capacity, with the system automatically identifying and rerouting unfulfillable orders based on configured routing logic to prevent fulfillment delays.

▶ **Order Item Adjustment Calculation Updates**

Refinement of tax-only and product-only adjustment calculations on the Order Item Summary object to improve accuracy and reduce errors in post-order financial adjustments.

▶ **Agentforce for Order Management**

Salesforce is integrating Agentforce AI capabilities into Commerce Cloud and Order Management, enabling AI agents to handle post-purchase customer inquiries and order status workflows within the unified Salesforce ecosystem