# Discussion Panel: A Deeper Dive Into Integrations & B2B Features

**1) Opening note (00:15-03:21)**

**Timothy Diep:** Good morning everybody or good evening, depending on where you guys are at. Welcome to the DCKAP eSessions for 2021. This is our February edition and we'll be talking about how we went live with Cathy's Concepts. So looking forward to this event. We have an awesome lineup of just all the partners that were involved with the process of the Cathy's Concepts website.

Cathy's Concepts is a premier customizable gifts provider that sells items ranging from travel, home, wedding and other related product lines. Information related to new orders, product details, real-time inventory and customer information were to be manually transferred from one application to another. This was one of the biggest pain points with their site.

Orders placed in BigCommerce had to be manually entered into Distribution One, and the latest information on inventory and product details from Distribution One had to be updated manually into BigCommerce. Cathy's Concepts required the automation of data entry related to orders, products, inventory and other key business data from and to their ERP and eCommerce software.

Today, we'll be going over the case study with some of the partners who were involved with this project. I'd like to have a big shoutout to all the sponsors from Distribution One, from BigCommerce and from DCKAP Cloras. These are the guys who will be speaking today. With DCKAP, we are really big in community and we love to bring the ecosystem together. So all these different companies have lots of skills, and they're very good at what they do. So if there's anything that we could do to help to even connect you guys to the right technology partner, do let us know. You can reach me at timothyd@dckap.com.

Next, I'd like to bring up Catherine Sulskis. She works with the marketing team at DCKAP as the Partner Manager, bridging connections, finding ways to co-brand and co-market our solutions, and building lasting relationships with our partners. She works to ensure that our partnerships add value to the community and to expand the partner ecosystem. I'd like to bring up Catherine. I'd also like to bring up the rest of the panelists too, Bijal, Adam, and Praveen as we kick off this Q&A session.

**Catherine Sulskis:** Great, thanks Tim. Glad to be here. As Tim said, I work closely with managing our partnerships, as well as helping with our events and bringing our partners together to join us and sharing our experiences like this. Today being with Distribution One and BigCommerce on Cathy's Concepts project.

We just had the honor of hearing some great presentations on most recently with Praveen and Cloras and some great points have been made. So thank you everyone for that. I'm joining on now to propose

all the questions for our speakers and guests. So we're gonna have Praveen stay on and then kindly invite Adam and Bijal back on to go over these questions. We'll talk about some of the successes of Cathy's Concepts and the integration and how these strategies support B2B.

**2) How Cloras aided Cathy's Concepts with their implementation process (03:22-05:12)**

**Catherine Sulskis:** I'll go ahead and I'll start off with Praveen to elaborate a little bit on the presentation you just gave. So Praveen, you did talk a little bit about Cloras and the role it played in Cathy's Concepts project? Could you walk us through some of the implementation process? Specifically, how long does it take to go live as well as what platforms and specific systems that Cloras supports?

**Praveen Venugopal:** Sure Cathy. Let's get to the implementation process and all of that. We have a pretty simple implementation process, I would say. Again, it depends on what we are trying to integrate and all of that, timeframe differs, but then on an average we see a timeframe of around six weeks for our integration to go live. And with respect to the process, initially it's the onboarding.

We have our checklist in terms of what we need, in terms of access and all of that. As part of the first week, we make sure that we understand the requirements and we also document all of them. Once that's in place, and we also have all of the fields which need to be mapped between both the systems, we get started off with the work and then we also provide weekly status updates to the customers.

That's pretty much how we go about and as part of the go live, we have a checklist in terms of what is required from Distribution One, and as part of the BigCommerce, what are things that are required. Then we go live with our customers. So that's pretty much the implementation process, Cathy.

**Catherine Sulskis:** Great. Thank you. That's really helpful insights.

**3) Learn more about BigCommerce (05:15-07:30)**

**Catherine Sulskis:** Adam, over to you. Could you talk to us a little bit about the platform from an API perspective and the available integrations for BigCommerce.

**Adam Semien:** So we have five different API's really, that we allow you to integrate into and we actually have really good training on all these API's and really good logs that developers can review. The ones that we allow you to kind of build into, we have our storefront API that allows you to build a better storefront and create a very unique experience using a custom CMS or a custom tool of your choice, a catalogs API that allows you to learn to efficiently build and manage and maintain large complex product catalogs.

We have our check out, our orders API as well as our stencil essentials, stencil just being the front end design framework that's built into the platform that allows you to build sites on top of within just kind of that stencil command line, which is a coding language that is not unique to us, it's actually very easy to learn for any developer that knows how to use just basic HTML.

All our BigCommerce is really built with these. Again, the open SaaS idea is that if you are using an internal tool, like the Distribution One, we have a marketplace with applications. Several of these integrations are just one click integrations that will allow you to build these different site tools or connect these different tools into your site. But if we do not have one of those different applications available, you can easily build custom code using our API or middleware that's going to allow you to integrate those two systems or as many systems as you'd like, I should say.

**Catherine Sulskis:** Great. Yeah, that's definitely good to know, certainly, to have that capability.

## 4) Distribution One's contribution towards Cathy's Concepts Project (07:32-10:08)

**Catherine Sulskis:** Bijal, I'm gonna go over to you for the next question. How important was inventory management in order processing, in the case of Cathy's Concepts, and how Distribution One catered to improving that process in particular?

**Bijal Patel:** Just specifically, in the case of Cathy's Concepts, they had a lot of different avenues that they were dealing with. Specifically, they were working with a lot of big box stores, doing a lot of EDI, where they had some stock promised to a specific customer on a specific date. These were big box stores that they had to deliver without chargebacks and things like that. So there were a lot of different aspects to it.

When you switch to an eCommerce platform, that's kind of the first come first serve basis kind of thing. So whatever you're displaying, you have to fulfill because you're taking payments ahead of time and things like that. A lot of complexity goes on into it. So just process streamlining was very important.

Managing the inventory, hey, how much of the inventory do you show? Do you create a certain specific warehouse for the items that you want to display on BigCommerce, so you have guaranteed stock versus the other customers like Amazon or Walmart that you're dealing with, where they have specific actual store requirements you have to fulfill. So it really comes down to complexity on what the customer needs, how many Avenue they're dealing with.

BigCommerce could be just one instance they're integrated with, they might have the other eCommerce sites that they sell with under a different brand name. So those kinds of things come into play. That's why we have real-time syncing available, where you can call inventory and pricing on demand if the system allows you to do it.

That was kind of something where DCKAP uses that API plugin that we have made available for a lot of different instances where you can just specify this item from this location, how many do you have right now and as you submit those orders into the system, it commits it against those, so it can give you the kind of peace of mind where Hey, the order was placed and is gonna be a guaranteed stock.

Some of the other kinds of nuances that they come up with as you go through the workflow processes, entering them manually. Specifically, in Cathy's Concepts, they do a lot of personalizations, for example. So in that scenario, how do you go about bringing that into the system from BigCommerce.

There were a lot of different workflows that we went through, and we kind of helped them accommodate through working with DCKAP.

**Catherine Sulskis:** Great. Yes, streamlining is important, as we know.

## 5) Gain deeper insight into Cloras (10:10-12:20)

**Catherine Sulskis:** Praveen, let me come back to you then. And just talk a little bit more about Cloras. I understand that Cloras supports real-time and batch-based synchronization. And could you provide some guidance on choosing between them?

**Praveen Venugopal:** Yeah, absolutely. So with respect to Cloras, we definitely support the batch-based and scheduled synchronization, and the real-time synchronization. To start off, I just want to give you some insights on what both imply. With respect to real-time it is going to be in terms of so whenever a customer is querying on the BigCommerce platform, for instance.

At that point in time, we access the API's which are mentioned, and then get the pricing in real-time and showcase it to the customer or the inventory in real-time and showcase it to the customer. Batch-based synchronization could be something more in lines of the product data, which gets updated maybe once in a day based on how frequently they are updating the information. So that's the difference between both.

With respect to choosing between both, again, it's a trade off, I'll have to say. With respect to a real-time, we need to be looking at if it is really required at that point in time, we look at our real-time synchronization, maybe pricing, because with respect to pricing, that could be a lot of pricing tiers within Distribution One.

Maybe if we are trying to replicate the same with BigCommerce, it might not be an effective utilization of resources of maybe BigCommerce as a platform. So it is better to kind of query that information and bring that over, if required. But then yeah, those are minor stuff is available, you could still maintain them within BigCommerce itself. It depends on what you're trying to accomplish here. But then, with respect to the product data and all of that, so that could be in batches. Maybe it could be synchronized once in a day, or even in some cases constantly based on the customer's needs.

**Catherine Sulskis:** Right. Yes, definitely. Okay, great. You could go over that particular detail for people.

## 6) Importance of Integration (12:21-15:00)

**Catherine Sulskis:** And then let me go over to you again Bijal, why would you say that integration is so important. And how helpful is Cloras to that effect in our partnership with Distribution One.

**Bijal Patel:** As far as the integration goes, it comes down to the requirements, the manual effort, customers have to maintain multiple different systems, it becomes redundant, error prone, and a lot of different issues that come along with just human intervention with a lot of projects on there.

As far as what we kind of strive for is ERP that has a lot of flexibility, where you can store a lot of data that you might store in some of the content management systems, but you have the ability to store all that and where there are certain checkboxes in our system where you can trigger that, hey, I'm ready to send this item to the website, all you have to do after you have submitted everything, you hit a checkbox that says yes, send it as a web item on there.

When Cloras pulls that data, that item becomes enabled on the Cloras cloud on the platform. So you don't have to go in and type those upload those images again, somewhere else. So it's a one-stop shop kind of to do those. It gives you a lot of flexibility. You don't want to be maintaining a lot, it obviously increases overhead, multiple people trained into multiple different aspects of it. So you want to keep it as kind of low as possible.

As far as that second part of your question, how has Cloras helped us is I've been doing this here for eight years now. So I've seen customers go through where, hey I'm trying to integrate something and they will just focus on one thing there. Where they just say I'm just trying to do this, but my ask of them has always been, hey, think 5, 6, or 10 years down the line.

If this is successful, how you're going to accommodate other things that you want to do. Keep in mind where technology is going or changing. In the past, you were just dealing with big box stores directly. Now you have to be competitive on Amazon, you have to be competitive on your own eCommerce front. So that's where Cloras has been a big kind of partner for us.

Anytime we get an integration request, I'm pretty confident in saying hey, we have a partner in DCKAP. It has a tool called Cloras where they have pre-built connectors for certain things that you need, and that will help you grow as a product. So you just connect once and you can kind of spin it off into Amazon, eBay, BigCommerce, or other different integrations so that's when the biggest selling point for any kind of comfort factor on our site is with DCKAP on there.

**Catherine Sulskis:** Great, thank you. Yeah, and I think that's a great point. Thinking ahead into the future a little bit is something to certainly consider

**7) eCommerce tips for B2B distributors (15:02-18:25)**

**Catherine Sulskis:** And then Adam, I'm going to go over to you with the next question. If you could tell us a little bit about SAS, and why B2B distributors in particular should care about it?

**Adam Semien:** Sure. So I'm gonna share my screen again. Let me know if you can see the slide I am sharing.

**Catherine Sulskis:** Looks like it's loading. There you go.

**Adam Semien:** So, what is SaaS? SaaS simply allows you to focus on your core business. So really why SaaS, it allows you as a distributor, or as any company really, to focus on what you do best being that core business to distribute its products, sells B2B, focused on your sales, your marketing efforts, and the things are really going to help you grow your business and not focus on really being a technology or a data company that has to do a lot of the things that we just do for you.

So kind of taking you through a chart here, I found this analogy, I shared this with Tim and Cathy last week, and I thought it was pretty hilarious. But if we were thinking about this, from the perspective of pizza as a service versus Software as a Service, a traditional on-prem system, you're basically doing everything yourself, right, everything from the dining room table, to put the cheese on the pizza, that's all managed by you.

You have to probably have a whole internal IT department or someone that you're paying to run that on-prem system. When we move into Infrastructure as a Service, that's when you're talking about taking away some of that cooking supplies or the tools that you would use, like the dining room table, the drinks, the electric, the oven, the fire.

Really, the infrastructure as a service would address things like you'd have to worry about like the pizza though, that tomato sauce, the toppings, or the cheese. Platform as a Service gets a little bit less, but then SaaS, that's everything, we're managing everything for you. And just to compare here, I have an actual real chart that kind of reflects the pizza analogy.

So again, for on-prem, you're managing everything from applications and networking infrastructure, you're managing applications to the operating system and then we jump over the SaaS, all of that is the stuff that we're managing for you and allowing you the time to focus on just growing your business and doing the things that really matter and aren't distracting you from increasing sales, connecting with your customers, doing the things again, that are gonna drive more revenue, and not be in some cases a time suck for your business. Hope my pizza analogy made sense for everyone.

**Catherine Sulskis:** Yeah, I was just gonna say thank you so much for sharing the analogy, cuz I definitely think it, it helps in a lot of ways to break that down just the specifics like that. So very helpful. Thank you. And you can probably pull that back if you'd like. All right, great.

**8) How Distribution One resolves the pain points of distributors and manufacturers (18:27-21:15)**

**Catherine Sulskis:** And then Bijal. I'm gonna keep going with you in terms of the distributors and manufacturers. Can you tell us what are some of the most common pain points for distributors and manufacturers that you see that distribution one console for?

**Bijal Patel:** It's not really a one-size-fits-all answer for everybody but you can imagine that we got we have customers that will range from, let's say, a smaller mom and pop shop that's outgrowing their old QuickBooks systems coming on to something new, where they might just need, hey, we need help with inventory management or something like that.

Our software is not module based by any way. Once you buy our software, you get the whole package, whether you use it or not. That's where we shine the most. It helps you grow your business. For the most part, we have seen customers who've been like Cathy's Concepts since 2007. They started with smaller firms and as they grow the business, our software can help them adapt to the changes with the needs that they have. That's where we differentiate ourselves and help them where we have.

We have the content management, we have the CRM, we have the mobile apps, the order entry side, we have our own eCommerce solution for B2B side of that stuff. So it really hits a lot of different aspects. Some of the pain points I would say is just depending on it was probably a mom and pop initially kind of running certain things, managing books, outside the system to where training on how to use the right technology.

We have a full implementation cycle where we can train you on certain technologies. When you get to it, if you decide to go the eCommerce route, we have a full department, hey, these are the options. So we help them guide through to make decisions on which technology partners to partner with, and things like that. So that's where we kind of shine, where you're not on your own. We're in this together, that's the kind of a family environment for us specifically.

We do a lot of user conferences almost every 18 months where customers get to learn all this new technology, you get to see what's out there, where technology is going. And that's where we can kind of help them. Till they see it, they don't realize, Oh, we could be doing this. Where is it? automating the warehouse? We were just picking everything off of paper before? Can I use my cell phone or things like that? There's a lot of different things people can do. And that's where we can step in and help them with all those points.

**Catherine Sulskis:** Great. Yeah, I think you brought up a really good point, too, you know, certainly things are modernizing in processes and making sure that they're aware of that, and educating them is certainly an important part of that.

**9) The evolving phase of eCommerce (21:18-24:15)**

**Catherine Sulskis:** All right, and then Adam, let me go over to you then for the next one. How are you seeing B2B customers change or adapt in terms of eCommerce.

**Adam Semien:** So really, what we're seeing is a trend more towards. So first of all, millennials are becoming or are getting into positions where they have the buying power inside of companies. If you think about millennials, a lot of millennials are internet first shoppers and consumers. Even from the way that they are, even if you think about their customer journey, they are doing their research for products as much as they can online.

Millennials do not like to speak on the phone, and I'm grouping here. But this is largely true. I can speak to this to some extent, because I'm in that generation. We like to do as much research as we can online. Even if we can easily purchase online, we prefer that over having to speak to a representative.

So B2B customers, B2B distributors, and B2B companies. It behooves them to adopt to the natural customer journey that the millennial follows, because that's a very familiar process.

We also are seeing from a B2B shopper perspective, that they're using more site tools and site technologies, they're going to make that buying journey shorter. So we even partner with a technology company that uses augmented reality. There's our B2B use cases like manufacturing equipment that needs to specifically fit in plants and they need to understand if this manufacturer equipment is going to fit. And of course, they can read the specifications. But having a visual augmented reality view of that equipment in a salvo plant is much more helpful for some buyers as a lot of us are very visual learners, myself included.

The other thing that we're seeing across pretty much all B2B sites is that personalization is king. So with Cathy's Concepts, being able to personalize that buying experience, even the pricing to particular customer types, is going to create a better buying experience and more streamlined buying experience for that individual buyer. It's also going to speed up just the total time of transaction because you're gonna have to go back and forth, get that person custom pricing, they can just do that all from the site directly.

**Catherine Sulskis:** Yeah, great insights. I think it also speaks to that modernization that's occurring. Awesome.

**10) How Cloras benefits B2B customers (24:20-26-40)**

**Catherine Sulskis:** And then Praveen, I'm gonna bring the final question in that same realm over to you. In regards to B2B, what would you say is the value that Cloras brings to the table for B2B customers?

**Praveen Venugopal:** Yeah, I guess it's a loaded question. With respect to Cloras, it has multifold benefits in terms of the value it brings to the customers, the first and foremost being reliable synchronization, which means that the data is flowing between multiple systems in a seamless fashion so you need not really look at what information is going in.

You need not have a person just looking at this information being processed between the multiple systems. So that is one of the biggest value add that I see that Cloras brings to the table. And the second one I would say is the dependence on the developers in an ongoing fashion. A solution like Cloras makes it easier.

You just have it implemented and you can have complete peace of mind. Even if there are some issues or anything which crops up or even if there are new upgrades coming up, with a platform like Cloras, we keep upgrading, which makes it easier. So you're not dependent on the developer to keep up pace with the upgrades with respect to BigCommerce or Distribution One in this particular case. Those are two major benefits that I would say, in terms of the customers as value added here.

**Catherine Sulskis:** Thank you so much. I think that's gonna wrap up, essentially, what questions we had, I really appreciate the insights into everything with Cathy's Concepts in regards to the strategy and your insights into B2B, as things are modernizing and moving ahead in the industry, I think we had a lot of helpful information out there for people. So hopefully, they can use that and contact us, each of us if needed on anything further. I didn't see any other further questions in there. So I'll go ahead and bring Tim back on and again, thank you, Adam, Bijal, and Praveen for the great discussion.

## 11) Concluding note (26:42-28:28)

**Timothy Diep:** That was a great discussion panel. I love the pizza analogy. So maybe a little hungry as well. But great illustration. Thank you.

So again, I'd like to thank all the sponsors and all the speakers as well from Distribution One, from BigCommerce and from Cloras, that was a great informative session. And just upcoming, we'll have our next session on March 9, right now, it's still TBD on who's going to be presenting, but it's going to be in reference for one of our case studies as well.

That's pretty much all we have today. And thank you again, for all of our speakers and for the attendees as well for joining. Hopefully, you found it informative, and I look forward to having the next session on March 9. If you guys don't have any questions, we'll see you guys then. So talk to you soon.