

Combining the Right Middleware Solution by Haritha Sridhar from Cloras, DCKAP

1) Opening note (00:12-01:48)

Tim Diep: Good morning everyone. Welcome to the DCKAP eSessions 2021. This is the one for March. We're going to have a special showcase for Midland Scientific and all the work that went behind it, including some of the technology partners that were integrated into the eCommerce site. My name is Tim Diep. I'm the host for today.

I'm the customer success manager for DCKAP. I've been with the company for about eight-nine years now. I've just been leading events on a monthly basis ever since COVID happened, which has been over a year now. And we've really taken the advantage of just really hosting these events online rather than onsite now.

Today we have a really good session and hopefully you guys are able to take lots of notes and enjoy it. I would like to thank our sponsors for this event. These are the guys that you'll be hearing later today with a short presentation.

So we have Midland Scientific. We have Avalara, Nexcess, Magento, and DCKAP Cloras. I would like to bring up Haritha Sridhar. She would be talking about combining the right middleware solution and choosing DCKAP for Midland Scientific implementation. She's an integral part of DCKAP's Magento team. Haritha is an experienced coder and her expertise lies in solving intricacies for clients from both B2B and B2C eCommerce.

She is one of the primary team members to create the presence of Midland Scientific online and has taken care of the technicalities with their problem solving nature and systematic approach. I'd like to bring up Haritha Sridhar. She's a senior software engineer at DCKAP Cloras. So welcome Haritha.

2) The challenges faced by Midland Scientific (01:50-05:22)

Haritha Sridhar: Thank you Tim for the introduction. Let me share my screen. So hi everyone. Thank you for having me here today. I'm going to talk on behalf of DCKAP about combining the right middleware solution and why Midland Scientific chose us for their website implementation.

Before jumping onto the agenda, let me give you a brief introduction about myself. I'm Haritha Sridhar. I have been working with DCKAP for about five years now as a senior software engineer. I had an early opportunity to work on Magento 2 from its booming days. Since then I have achieved a couple of certifications, which comprises Magento Commerce Developer and Magento Commerce Front-End Developer.

So, jumping on to today's agenda, we'll be talking about the challenges that were faced by the Midland Scientific team in their legacy website and how our product serves as a middleware solution for them to integrate the B2B features from Magento to Epicor P21. We

will also see a bit about how flexible they are using our current platform in extending their features for B2B strategies.

Before talking a little bit about challenges, I want to thank Rodrigo for providing the detailed introduction about what they do. I just want to give a quick recap about what Midland Scientific does. They are the full-line distributors for lab supplies, chemical products, and equipment, supplying over the entire United States.

Before reaching out to us, their earlier eCommerce platform was Epicor B2B Seller. So while extending the product for B2B strategies, they faced some hindrances and that made them rethink about the platform. So these are the challenges that they were facing in their earlier website.

The first one to talk about is the customization. In the B2B seller, there were no parts of code that were customizable. So they had to rely upon Epicor to make these small changes on the website. And every time they reached out to them, it was a long period and it was way more time consuming.

Also the speed of synchronization was a bit slow because they had to find the right time to update the information and they had to sync them manually. Even after making things on track, they weren't able to relax. With respect to their daily sync failures, it was very hard for them to identify the cause, troubleshoot it and fix it.

Again the cycle repeats itself and it was making it very hard for them with their earlier site. So for several years, they were looking for one platform that could provide them more flexibility to implement the B2B strategies.

3) How Cloras saved the day for Midland Scientific (05:24-15:48)

After finding our product Cloras, which seamlessly integrates the Magento website with Epicor P21, their challenges have come to an end. Finally, what is Cloras? To talk a little bit about Cloras, it is a cloud rapid automation system, which runs as the Integration Platform as a Service. It means that the system can be integrated seamlessly over cloud and irrespective of the technology we are trying to integrate.

So we need not worry about the different environments they are running upon. This serves as a middleware solution used for connecting two or more systems automatically. We are able to see the real-time data just by seeing the user interface. For using the Cloras product, we do not need a special coding knowledge for extending the features. So that makes it very much easier for the distributors to integrate over the site.

Let us dive into some of the integration that has been done for Midland Scientific based on their company and their customer integration. The first one to talk about is the customer registration. We have customized the Magento platform comprising both the brand new customer and the existing customer.

Whenever the existing customer comes to the site, they will be provided with the three options for collecting the email ID, customer ID and the zip code, then they are able to

register onto the website. Even a brand new customer, who can come and register on the website is able to register with the form we have provided and all those information will be synced to P21.

Once they have registered onto the website and are approved, they are able to see a wide range of portals available on the dashboard. Using the feature we have provided, they can place an order with different shipping addresses, by creating a new shipping address or even editing the existing shipping address.

So all those information will be synced back to P21. And, it is one classic instance for bi-directional sync. Whatever we update here, all those information will be synced back to P21 and whatever the edits we made in P21 will be synced back to Magento. This is a simplified mapping interface, which is one of the features available in Cloras.

Let me give you a scenario where the simplified mapping comes into play with the customer registration. This is the mapping between two systems- Magento on the left and ERP on the right. With the customer registration, there will be two different sets of fields for collecting the name.

One is the first name and the second one is the last name. So by an ERP, there is only one field to collect the information. We have to map these fields in order to get their information to the ERP. After this is mapped, it can be modified using the advance modifier. This is another Cloras functionality.

Once this has been lined up, the first name and last name can be concatenated using the advanced modifier. There are other modifiers such as capitalizing and removing the unwanted words and combining or splitting up words and many more are available on the system.

So far, we have seen some of the customer and company-level integration. Now we'll talk a little bit about product-level integrations. The first one to talk about is the dynamic pricing. Every customer will have a different set of pricing libraries for each product that will be available on P21.

We have provided the option to display on the product detail page and category page. Also to talk about the inventory sync, the customer will be able to see the real-time inventory available when they go to the product page. Some of the products that are available on the website are restricted.

Even though they are displayed on the website, buyers are not able to add the item to the cart. Until they are approved from the P21, the product will remain as a restricted on the website. Similarly, there is another set of products, whose price will not be displayed on the website.

If the buyers want to see the pricing, they can request it to the Midland Scientific team. Once they have approved on P21, they are able to see the pricing on their dashboard. All these integrations will be dynamically pulled from P21 to Magento using Cloras.

Moving onto the order integration, the first one to talk about is the order sync. Once the customer reviews the product and places the order, all the information will be synced into P21 using Cloras. Next one is the offline orders. To talk a little bit about offline orders, these will be placed directly on P21.

All the information regarding the offline orders will be fetched from P21, and it will be displayed on the website. This is one classic instance which provides the omni-channel experience for the customer. The next one to talk about is the back orders. We still allow the customer to place an order, even when the product is out of stock.

The next one is about the scheduled order. This is kind of like a subscription basis where the customer can order in bulk and get it delivered once in a while for a month or so. To talk about the invoice payment, some of the customers wanted to see the invoices that are present on P21 and the website.

After the data is pulled in dynamically from P21, this will be displayed and open invoices can be paid from the website using the credit cards that they are using. We have provided a feature for requesting the quote from the website as well as dynamically pulling the quote from the P21 as well.

All these quotes will be converted to orders on the website. This is the scheduler, the one feature that is provided by the Cloras. This is used for automatically syncing the orders or creating the customer and more. We can set the frequency for about five minutes or an hour also.

The one main advantage of this scheduler is that it not only automates the synchronization between Magento and P21, but it mainly tracks the information including missed record and updates the call from the last synchronized. Let's say if any of the orders fail, all the notification will be sent to the support team.

Once they have been notified, they are able to troubleshoot the issue instantaneously on Cloras. To troubleshoot the issue, we have provided them a feature called detailed logging. This detailed logging will provide the detailed information of the issue that has occurred. Also we can download this information as a file, which provides clear-cut details. These are the key features that Midland Scientific found to be very much beneficial.

Overall the Midland Scientific was very much satisfied with respect to the flexibility of the platform they are using. With the customization being done by them, they find it more as an absolute solution than any other product. By using the detailed logging and failure notification, it was made very much easier for them to troubleshoot the issue and by using the user interface, they find more visibility over the workflow.

Overall the Midland Scientific find that they are very much happy and their overall sales have been improved and they find it more flexible than any other solution. Thank you, Tim. Over to you.

4) Concluding note (15:48-16:35)

Tim Diep: Thank you so much Haritha on your presentation and just thank you for all our presenters as well, just bringing everything together and what was done behind the site for Midland Scientific.

Thank you again for all the sponsors from Midland Scientific, from Avalara, from Nexcess, Magento, and Cloras. Without you guys, this eSession wouldn't be possible. Thank you guys once again for all your help and your contribution to this.

And then just mark it on your calendars. The next DCKAP eSession will be on April 13th and this will be in regards to the ADA compliance. That's another hot issue within the B2B market. That's all I have here. Thank you guys so much for your time and hopefully you guys have a great day and stay safe out there.

So we'll see you guys. Have a good one.