

Discussion Panel Moderated by Catherine Sulskis

1) Opening note (00:12-03:03)

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 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 her up. She's going to do a deeper dive into integration and B2B features along with all the presenters. And then we'll also bring up Efi from Magento. Welcome.

Catherine Sulskis: Thanks Tim. Yeah, I'm happy to be moderating the panel with our partners and guests today and continue to start the discussion on our solutions, the successes with Midland Scientific, some B2B strategy and the benefits of the integrated eCommerce experience. A lot of great points have been made in the presentations and going over the solutions.

Thanks again to everybody for that. I'll be asking our guests some questions and then opening it up for some further conversation. We're going to have Haritha stay on with us. Then I'll kindly invite Rodrigo from Midland Scientific, Maria from Avalara, and Gary from Nexcess to come back with us.

As Tim mentioned, we do have a great special guest Efi Shabtai, customer success manager from Magento, Adobe, who will be joining us to contribute to the conversation. Efi comes with 14 years of experience working with enterprise clients in her role as operations manager at Magento Commerce.

Today, she stands at the position of a senior account manager and handles 20 plus enterprise accounts in the Midwest West. Her experience comprises a detailed understanding of customer relations, licensed consulting services, upselling annual multi-year license

retention. Welcome Efi. We're really happy to have you and looking forward to our conversation.

2) Throwing light into the digital transformation journey (03:05-06:12)

Catherine Sulskis: All right. So I'm going to start with some questions and I'm going to go back over to Haritha first. I'll start with asking you just further on the project. When it comes to the customer experience, what are you most proud of accomplishing on the Midland Scientific project. And then perhaps you can expand a bit on how integral the migration to Magento 2 was.

Haritha Sridhar: Thank you for that. That's a good question. Regarding the customer experience, I'll talk a little bit about it. There are many features built with the website that we are happy about accomplishing. One thing that always strikes my mind will be the customer registration and our company structure, which is one of the large customizations we implemented.

We have customized the wide range and to talk a bit about the customer structure it is more or less like the admin administrator will be on the main level and our managers will come and users will be present.

We have customized this functionality to provide them the purchase limit while placing the order. So the user is able to place an order using the 'Pay on Account', which is a special payment method we have provided them. So, let's say if the purchase order exceeded their order amount.

What we'll do is, we'll just suspend the order and we'll notify them to the managers and managers are able to view and edit the orders and they can approve it. So once the order has been placed, this will be synced back to the P21. So overall, we have an end-to-end integration, right from PIM to Magento and from Magento to P21.

Also there are some bi-directional sync from P21 to Magento 2 also. So, once in a while, we'll update the products from Akeneo and the product pricing and inventory will be synced from P21. So, this provides them more flexibility. This serves as an integral part of migrating from the B2B Seller to Magento 2.

3) How Cloras aids integration (06:14-07:52)

Catherine Sulskis: Okay. Great. Yeah. Thanks for expanding on that. I think that's helpful to kind of go over some of the specifics there and then additionally, we've heard some of the higher level points on Cloras in your presentation and the ways that it can help simplify and automate and could you just expand a little bit more on that such as the systems that supports.

Haritha Sridhar: Yeah sure Catherine. Cloras is a middleware solution that connects their application end-to-end. So it has the potential to manage and automate data synchronization across multiple systems with great security and provide seamless integration for cross-platform.

It provides a wide range of integration with respect to ERP, eCommerce, and CRM. And many other systems have been successfully integrated. So far, we have integrated about hundred customers over these years . We have some pre-built connectors and templates are readily available.

So, whenever the signup has been done, we can easily get it onboard. Another thing is the user interface, which provides more workflow visibility for the customers. So that will provide the workflow and real-time experience can be provided. We have connected the eCommerce channel with Magento one and two, BigCommerce, Shopify and all that.

With respect to ERP, we have connected P21, NetSuite, Acumatica, Epicor Prelude, and all, and with CRM, we have integrated HubSpot, Salesforce, and Bronto.

Catherine Sulskis: Yeah, thank you. I mean, certainly a lot of different things that can be automated altogether, which is one of the great points of it. Thank you so much for contributing to that.

4) How DCKAP resolved the challenges faced by Midland Scientific (07:54-15:22)

Catherine Sulskis: Rodrigo, I would love to go over to you and I wonder if you might tell us a little bit more about your experience with DCKAP in implementing Magento Commerce and integrating P21 using Cloras. Could you explain some of the benefits and highlights and what you think might be the best features of that?

Rodrigo Neves: Sure. Yeah. Our implementation process was really long. I think it took a year for us to go over everything and be ready. Mainly because we had a lot of customizations already implemented in our previous ERP and the type of features that were required to be part of the new platform because we had a lot of important customers and that created a lot of challenges during the implementation.

We had a lot of requirements and they had a lot of details. One of the things that I asked DCKAP since the beginning of the implementation was to have daily meetings with the development team. I think that kind of surprised DCKAP because the customers would demand all of that attention.

But it was one of the reasons that our implementation was successful. Just meeting every day and making sure that all of our requirements were understood by the DCKAP team and reviewing and testing the platform was something that made a huge difference on our implementation. I think one of the characteristics also that the DCKAP team had was being able to adapt.

Because we didn't know Magento that well, a lot of the time we had something in mind and we had to change. So we kind of have a similar implementation, like using the agile method where you have to review your requirements and adopt and change all the time.

The DCKAP team was always able to list them to us and explain what has to be changed and being able to adapt to the requirements and meeting every day for a year, it was something that we value a lot. The DCKAP team was able to do that with us. And sometimes we had to

test things at night and meet again in the morning and work over the weekend. So, not all the partners would agree to do something like that for your customers.

So something that we appreciate a lot that DCKAP did for us and talking like more about Cloras. It was one of the main reasons that we chose DCKAP. Integration is something when you were talking about a PIM system and ERP system and all our different softwares that you have information and you need to make that available to the customer, find a solution that would be able to just offer all of that to you in a place that you can see and you can manage.

That's great. It was amazing. Even notification is something that DCKAP was changing and adapting the solution for us because of some of our requirements. It's something that is really valuable for us because users are really creative. It's really hard to predict how they're going to act and how they're going to interact with your site.

And being able to just receive a notification if something failed right away and just act on top of that and change the platform and fix the problem sometimes in a matter of minutes, it's great. It's just something that we didn't have before. And after six months of using the system and also being able to change and adapt to new requirements, it's been great for us.

We couldn't be more than happy about this. Using Cloras, it's a great software. And, yeah, just being able to expand and receive notifications, monitor and being able to see if something is going wrong. Yeah, it's great. We also use that, we have cases that we had an issue with the network and we started receiving a lot of alerts on Cloras just because something was wrong on our side, nothing related to what DCKAP did.

It has been great. We are finding new ways to monitor our system and all other pieces of our network as well. So, yeah, that's great.

Catherine Sulskis: That's always great to hear. And certainly, along with our partners as well, taking care of clients is certainly a priority to make sure that everything that we provide for solutions is working as needed. If you could also just let us know what you think are the benefits of using multiple development environments from the hosting company instead of using local development environments.

Rodrigo Neves: Sure. Yeah. I can definitely talk about that. So yeah, we started with local environments and we were having a lot of headaches trying to manage hardware and making sure that all the local environments had the same resources and the same information.

Also search is something huge for us. We have, as I said, almost 400,000 products and being able to bring back, so all of the products and making sure that all the local environments also have a search engine. So we were spending a lot of time on things that were not bringing any value to our customers like just trying to manage with a small team.

Local environments were just slowing down our development process. So, we decided to try it out, just using that, just for that also. And it's been great for us. So now we can just have one main environment. One server having our production side and also our staging site

where we do caching before putting code to our live site and having that site, each developer had their own system.

Then you have some share resources like search. All of the dev environments are sharing the same search. So you just need to worry and take care of only one search engine for all the dev sites and also because of COVID and also because of office space, we had to just adapt and we have developers working from anywhere.

Sometimes we also have some internal teams doing development as well, not only DCKAP. So sometimes they work from home. Sometimes they work at their office. Sometimes they have to travel and work from a different place and not have to worry about it about the hardware again. Just having all that information on the cloud is speeding up our process so they can work basically working from anywhere.

The main thing is just because we had a lot of different dev environments and the test team was having to just be in touch with each one of the developers and making sure that they were doing the right things. It is just sped up the testing side because you can just be in touch with the developer and check the website and our team doesn't need to have access to the local environment anymore. You can just bring up the site on your phone or from any desktop and because it's on the cloud, you get access right away.

5) Gain more insight into the dev environment (15:24-17:12)

Catherine Sulskis: Yes. Great, great points. And, I'd love to bring it over to Gary for you to chime in and maybe elaborate on that. I mean, Rodrigo touched upon obviously, you know, improving speeds and simplifying processes, but maybe you can go a little bit further in some of those benefits for us.

Gary Smith: Yeah. I mean, Rodrigo really told the story in a way better than I can. I actually got to harken back to my own experience with an agency. I mentioned it in the presentation, but I'll elaborate on it. Man. It was a headache. We would frequently have developers that worked with the agency that I helped run. And it's like, well, something blew up on our local dev environment and it happens because that's what you do as a developer as you are trying to fix things and sometimes trying to break things so that you can understand why they're breaking and so on.

And these things can result in unrecoverable errors. So now you've got a Macbook or a Linux machine and you're just going, 'well, it's just easier to start over'. And that's five, six, seven hours. That again, if you're the merchant, that's just dead cost. If you're the development agency, you can't bill it, or you have trouble building it.

So, here you go. I think to be candid, it's something that not a lot of our customers are doing. I would like to investigate that further with you Rodrigo because I think it's a great application and what we're doing with the cloud environments, more typical scenarios just simply like the main dev environment.

Like when you've pushed all the branches up, that's when you use a dev server. So Midland is unusual in how many they have, and I think that's really cool.

6) Benefits swept in for B2B operations from eCommerce websites (17:14-19:58)

Catherine Sulskis: Nice. Cool. Well, let's go a little bit further into how B2B operations benefit from eCommerce sites if they rely on salespeople to answer questions for customers.

Gary Smith: Okay. Sure. Again, I'm kind of harkening back to some of my experiences before Nexcess. Again, I would like to hear the experiences of others on this, but if you sell something that's a product that gets used in manufacturing or it's an additive or it's chemical or something. Well, that's not like going onto Amazon and picking it off a shelf.

Rodrigo mentioned the imperative nature of search because people aren't going with physical descriptions. They're picking up a container perhaps and looking at a part number and they want to order from that part number.

If I go on to Amazon and I search for something and I get a lot of amusing, similar suggestions, okay, cool. But if I'm buying B2B, I want to know exactly what I'm getting. So search becomes super important. But getting back more to your question, even if I can get tons of information straight off the eCommerce site, then I may very well still need a rep.

I may need to get on the phone or chat with the company's rep and say, okay, but will this work with that? Or can I customize this? Can I add something to it? And depending on the workflow, which is always one of the cool things about B2B is it's always so unique. Every company is so different compared to a seller of packaged goods.

That need for expertise from the reps, which means that the reps really kind of need to join the customer at the website as it were, and be able to look at what's going on there. And so it becomes a tool for the sales rep and the customer jointly.

I'm old enough to remember carrying a whole bunch of catalogs into sales calls with manufacturing clients. And I would have loved to have had an iPad and say, okay, well with this system, you can get this printed or we're out of stock on this and so on.

Catherine Sulskis: Yes. Well, having that increased support is certainly an important part of that. Yeah, thanks for expanding on those ideas.

7) Tap into the benefits of Magento Commerce in the B2B space (20:00-23:30)

Catherine Sulskis: In regards to B2B, maybe going a little bit with that and going over to you, Efi, thinking about this project and others, perhaps in a similar position, looking to start their eCommerce, tell us why Magento Commerce for B2B and what some of those benefits are.

Efi Shabtai: Yes. Thank you. Well, one of the first things being at Magento for so long, it's really great to see everything evolve from day one and how so much effort and passion went into all of these projects and making Magento a really, really strong platform. We were one of the first open-source platforms that enabled merchants to succeed with scalability and flexibility.

With being open source, you have that opportunity to create and innovate to what your business needs are and to be able to structure things that way. B2B allows sellers to offer

their clients a variety of things, overall better service, attracts new customers and transitions everyone into this new technology that we're in, in this new ecosystem of no more faxing orders or kind of moving away from that.

So Magento is really trying to encourage everyone to be up-to-date with technology and be able to grow their business on both the B2C level and B2B level in one platform. There's a lot of features that are available that could be really useful to our merchants with respect to policies, procedures, approvals, and workflows. So there's a variety of things that could be very beneficial to B2C.

Catherine Sulskis: Correct. Awesome. Yes. I mean, it's certainly something that needs to be considered and in taking a venture like that and knowing that you guys are there for support and have that experience is certainly helpful to them.

Maybe you can expand a little bit further too, and just your experience, what are some of the biggest pain points that you've seen in the B2B market perhaps specifically and how Magento can help solve those pain points?

Efi Shabtai: Yes. And one of those things, the biggest thing is being open-sourced. So with a B2B module that is included in Magento, it is completely open-sourced. So you're able to modify it to your business needs, client needs, how you work with distributors and kind of, again, moving away from the fax, making EDI a little bit more easy flowing and easier to work with.

And I think that is the biggest strength of the B2B market today on how Magento can help with that. Since we manage or we help so many different types of B2B businesses that have a large variety of SKUs, that have different workflows, different purchasing procedures, there is that flexibility to be able to kind of create the workflow based off of certain levels and what the company wants to see as far as how the workflow works for them, right.

Catherine Sulskis: Having that kind of flexibility and openness. Great.

8) Tackling the tax challenges and barriers in moving online (23:33-26:40)

Catherine Sulskis: Well, I guess I'm going to go ahead and go over to Maria. I wanted to touch base with you on some tax challenges and perhaps you can talk a little bit about what the biggest tax challenges you see for manufacturers.

Maria Tringali: Yeah, thanks Catherine. I've mentioned that a little bit during my presentation, but I think the biggest challenge for manufacturers right now is just understanding what their tax requirements are.

Well, two things, one is understanding that Nexcess footprint that we talked about, where do you. Really, according to the new laws need to be registered, to collect and remit tax and then getting registered. The second thing is moving online. It's exactly what we've been talking about.

We need to move more of our business online. We're adding B2C and we need to make that transition and the purchase process so much easier for both our B2C customers and our B2B

businesses. And we need to move that B2B process online, it's no longer sustainable to go out with your, um, with your stack of catalogs, Gary, you know, out to someone's office, that's just not going to happen anymore.

I really think people hesitate to move B2B online when really that's what our B2B buyer wants.

Catherine Sulskis: Yeah, definitely with lots of things changing in the industry and the way that people are just shopping online businesses are shopping online.

Maria Tringali: And tax compliance shouldn't keep you from doing that right, Rodrigo. It's not a reason to not go on the line. It's not.

Catherine Sulskis: Well going off of that then re um, what would you say are the biggest barriers to moving more businesses online?

Maria Tringali: Well, the fear I think of what's out there. We hear a lot of fear of connecting to their platforms. Rodrigo added to P21, where people have a fear of connecting the cloud to their platform.

So I think there's a lot of data security and maybe just fear of the unknown, what's that experience going to look like? How much work is that going to take? That's what we've been talking about for the past couple of hours, but you know, what is the process for doing that? I don't know how to do this.

And so I think people get sort of stuck in moving forward because of all these things. But there are people there's a bunch of us on the call here to help walk you through each piece of that and create the experience that you want for your customers. I always tease my customers that yes, we're going to connect cert capture certificates to our website like Midland has.

My web developer might not be a tax expert, but don't worry. We've got people that will help you get both your web experience or tax compliance, your ERP. There's a team of people that do understand this and can walk you through it and are doing it every day.

So I think it's really the fear that I see a lot. Maybe cost, but I think at the end of the day, Rodrigo sure can vouch for this, that their sales have been increased. So you will, there will be a return on your investment. We promise.

09) Dive deeper into the enriching thoughts shared by the panelists (26:42-35:03)

Catherine Sulskis: That is always important. Of course. All right. Great. Well, that's basically the question portion that I wanted to go through with you guys, what I would actually love to do is just step away a little bit from direct questions and just ask for maybe some more thoughts and experiences or personal stories and some insights around sort of the main topic that we've been speaking about, which is the importance of integrated eCommerce in B2B and bring incidence you just spoke about some of these barriers when businesses are facing moving online, perhaps you can start by expanding on that and talking about how tax compliance might pertain to the idea of the integrated experience.

Maria Tringali: In addition to what we've already, what we already talked about, but you know, you do have to connect, uh, you have to think of tax compliance as connected to everywhere that you do create an invoice. And again, Rodrigo has Magento on P21. It's not just an online requirement. It's not just an eCommerce requirement, right.

States do require that you report all of your transactional information. So when you look at a solution for anything. It needs to be a centralized solution that doesn't just cover eCommerce it covers everywhere else that you also create invoices. Sometimes even quoting, a lot of people do quotes and they require their tax calculation there.

As you might have a quoting tool, a CRM. So you need to think of all the platforms where you might create an invoice or a quote that requires tax determination needs to be made. So definitely want to connect all of those, not just one. It doesn't work with just one. Also, you can't do this with just your taxable sales. People do that. Well, can't I just do my taxable sales, no tax compliance covers all of your sales.

Gary Smith: Hey, Maria, harkening back again to my experience as a rep, CRMs and reps get put in some tough spots when it comes to tax. And I could see tax compliance software helping with that. Because when I found that a lot of my customers in other industries insisted they were tax exempt, but they're not.

And so it's really helpful to be able to put up the criteria. It said, okay, well, you're tax exempt. As long as you can provide this documentation, here's our handy process. Like you described in the checkout process. Here's our handy process to give us that paper so we can prove your tax exempt.

Maria Tringali: Yeah. Every sale is taxable sans that proof. There's no honor system here. It's taxable or you have proof. Yep. And here's our system to provide that proof. I like that.

Rodrigo Neves: Yeah. And just adding to that also, I think one, one of the things that we see in our customers is when they are having a relationship with our company, they are expecting to have the same experience.

It doesn't matter how they reach out to you if they call you and they want to talk about their taxes and exemption is just one state, they want to have the same experience if they go to our website and check that information as well, if they send you an email and ask that question in a different way. So having all the systems integrated is something that makes a huge difference when you're talking about customer experience.

You have the information saved on your ERP and the customer expects to see it when they go to shop on your site. So having all the systems communicating and offering that same experience to the customers is something that is really important when you talk to B2B, because in our case, we deal with corporations.

So you have a lot of users that expect to see the same information related to their company. And they're going to reach out to you in a different way. Some of them are going to prefer to call. Someone is going to prefer to send an email. Someone is going to prefer just to ask for the website and know how to interact with anyone.

And when you don't have all of the information integrated and offering the same experience and make it really a challenge for your business. So that's why I think one of the reasons that it's really important for us, that we are a small team having partners that are specialized in different areas.

So when I said that I don't know a lot of taxes, our accounting team knows way more than me and just me being on IT and not having to be specialized on taxes is really important for us. So we rely on Avalara to just take care of all of our business challenges in terms of taxes, but also looking for new trends and being able to adapt to the new regulations and the same apply for hosting and for other areas.

So I think that's why it's really good for us to have partners as they can not only have our current requirements, but are looking for new things that are coming up as well.

Catherine Sulskis: Yeah, that's a great point for sure. And, having those partners available, like you said, is certainly an integral part of making sure that the customer experiences as best as it can be and maybe Efi, you'd have some contribution as well to the integrated experience.

Efi Shabtai: One of the great things in regards to tax is that Magento has a quick order form. So once somebody places a quote or wants to get pricing on specific items, they can see in addition to the taxes on what they will be charged, what the total is going to look like.

They have full transparency on what to expect and then they go ahead and they'll be able to place the order through the workflow that they're alone. In regards to taxation and how that works, that's also something that is really helpful to a lot of companies to have that transparency in the ordering.

Catherine Sulskis: That's great. Great to know, certainly that that kind of information can be very helpful as well. And then maybe Haritha, if you had some contribution on the integrated experience, you wanted to expand on it a little bit.

Haritha Sridhar: Sure. So one of the main motives for creating the whole website or creating the omni channel experience for the customer, I believe that we did that shopping experience for the customers. So they are distributed all over the world and all the information will be on the ERP.

By using the product, Cloras and the extra step of continuing the integration with Magento Commerce platforms. So all these are integrated and it is a great feature for the customers. So they'll be happy to see the changes that are made offline and online. So that is one key benefit that can be provided from getting the whole site integrated.

Catherine Sulskis: Great. I think there was a little bit of a noise in your background there, but yeah, for sure. Having that integrated experience, like you said, with everything being connected with ERP included, certainly some great benefits to that. And, I'm going to go ahead at this part of the session and go ahead and bring Tim back on board for us, for if there's anything additional in questions.

10) Concluding note (35:05-35:52)

Tim Diep: Awesome. Thank you guys so much for a great presentation. You guys are the superstar team just really showcasing the whole process of bringing Midland Scientific with their eCommerce website. So thank you guys so much for your time.

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.