



erpCommerce[™]

THE CORE INTEGRATED TOUCHPOINTS

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THE CORE TOUCHPOINTS IN A BEST IN CLASS B2B & B2C ECOMMERCE SOLUTION SEAMLESSLY INTEGRATED WITH ERP.

ERP and eCommerce systems are two distinct business tools that need to be integrated to provide the most benefit to a business. Separately, both systems are widely accepted for being cost-effective solutions for operating and organizing a business. Flexible eCommerce software allows businesses to take control over designing an online store and Enterprise Resource Planning (ERP) platforms allow companies to “manage and integrate the important parts of their businesses,” according to Investopedia.

Together, ERP + eCommerce makes the Pixafy erpCommerce™ solution; a fully integrated system that allows backend data to work with nearly every other business operation for better information management. While awareness of the benefits of our erpCommerce for business is slowly but surely growing, it might be a nice refresher to break down how necessary integration of these two distinct systems is for modern businesses.

INTEGRATION IS KEY

Integration of these two systems allows them to share vital information between back-of-house and customer-facing operations with minimal human input. Data coordination is crucial for streamlining eCommerce operations, and ultimately turning a larger profit.

Even though integration is a complex process, it doesn't have to be overwhelming. Some of the best practices for ERP and eCommerce integration are as simple as having a plan in place and keeping an extra copy of data available prior to implementation.

Allowing a backend system to share data with an eCommerce platform not only benefits business operations, it's used to enhance the customer experience. eCommerce represented 14.3% of total retail sales in 2018, according to Digital Commerce 360. Having a website where consumers are viewing accurate information and receive the right order on time not only increases a business's online presence, it can increase sales and create a positive brand reputation.

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PRICING

WHY ERP & ECOMMERCE PRICING INTEGRATION IS CRUCIAL FOR B2B COMPANIES

B2B customer portals require complex pricing rules and integration with customer records, among other things, to provide tailored shopping experiences clients desire.

Even though pricing is a primary touchpoint of any eCommerce transaction, there are still large capability gaps in price and discount structures. In a survey of more than 1,700 B2B companies, Bain & Company found that roughly 85% of respondents believed their pricing decisions could improve.

THE INTRICACIES OF PRICING IN B2B ECOMMERCE

B2B customers desire a transparent shopping experience that shows them the right price based on their contract and agreed upon discounts so they can continue with the purchasing process. A seamless check-out experience tailored to each individual business helps clients down the sales funnel and can even improve an organization's overall performance.

Harvard Business Review found that top-performing B2B companies exceeded their peers in three key areas of pricing. The greatest differentiator was that companies with the largest market share employed "truly tailored pricing at the individual customer and product level."

Presenting different prices to selected customers may sound complicated, but it's not with the correct complex pricing integration.

WHAT IS COMPLEX PRICING?

One price does not fit all in the modern shopping landscape. Depending on the customer, quantities and shipping, prices can vary – but how do you convey different pricing to consumers without overwhelming them with choices and complicated account criteria? The answer is complex pricing.

Complex pricing allows businesses to set different prices depending on a customer's details. For example, most companies offer a retail price and a wholesale price for items regardless of volume. On a simple level, different customers can be created so when they sign in to shop they are presented with the price corresponding to their needs.

For businesses juggling different clientele and discounts, they may need even more complex pricing. In this scenario, companies can tier customers into different groups, assigning a unique pricing to each. When the customer enters their account, they will be shown the price based on their assignment. The same can be done for discount codes.

OTHER COMPLEX PRICING DRIVERS:

- » Customer
- » Product
- » Customer ship to location
- » Ship from location
- » Volume discounts
- » Family discounts

Static pricing does not take these criteria into consideration, and businesses can lose out on strategically changing their pricing to appeal to different customers.



THE IMPORTANCE OF ERP & ECOMMERCE PRICING INTEGRATION

ERP and eCommerce systems work tirelessly behind the scenes to help manage a business' online presence, but are often treated as two separate entities.

When it comes to pricing, most of the crucial information on SKUs and costs are handled by a business' ERP system. Having this information organized and on hand is helpful, but it's not customer facing. Instead, consumers will be interacting with a company's eCommerce platform to view crucial product information and, hopefully, complete a purchase.

An eCommerce platform must be flexible and integrated with an organization's ERP to support complex pricing and provide users with the most accurate retail experience. Unifying ERP and eCommerce systems can help companies create a seamless workflow between back of house operations and the customer experience.

When ERP and eCommerce are integrated, businesses can begin to create more complex tiered pricing to show the correct consumer the right place when they need it. Accurate product pricing will always be displayed depending on the customer, shipping and quantity - no more manually updating product display pages.

An integrated system means customers are receiving the most accurate and personalized pricing information to help them with their purchasing decision. It also gives businesses the freedom to tier their pricing and discounts to certain customers to manage their sales.

Integration takes away the burden of manually updating each system while providing customers with a seamless shopping experience.

HOW PRICING WORKS WITH ERP/COMMERCE™

With access to subject matter expertise within our sister company Net at Work, Pixafy's erpCommerce™ solution was created with ERP as the core value add. For B2B enterprises beginning their eCommerce journey, pricing in our default format can be a great start to optimizing their online presence.

All pricing is set in the ERP system. By default, erpCommerce™ does not show customer-specific pricing while browsing because it can vary based on volume and shipping. For this reason, a final price will be received from Boomi and the ERP once the quantity, shipping and customer information is set in the cart.

If an item does not exist in the ERP, the default Magento price will be used instead. In this scenario, a customer will be alerted to this change and given the direction to either continue with their purchase or remove the items from their order. Orders containing these items would then go back into a dedicated status determined by a configuration so that they are not automatically sent to the ERP with the default pricing on them.

On the front end, the Product Listing Page and Product Display Page will display a message to customers stating: "Add to Cart to View YOUR Price." There is the ability to change this and display pricing on pages if products are simply priced by their SKU level.

While these are mostly default options, erpCommerce™ is a highly extendable and flexible solution. Enterprises can create their own tiers and customer groups and define what pricing and/or discounts they receive. Additional features can allow customers to request pricing on certain products or add a quantity selector to the Product Display Page that updates pricing when set.

INVENTORY

THE BENEFITS OF STREAMLINING INVENTORY WITH ERPCOMMERCE™ FOR B2B COMPANIES

B2B customers expect a high level of professionalism and personalization from their shopping experience. From the moment they enter your eCommerce website to their final order update, they require a seamless interaction with your brand.

One of the major touchpoints along the B2B funnel is inventory. B2B customers expect inventory levels to be displayed accurately on product pages and will base their orders off the given information. It's paramount that the levels displayed are accurate so businesses are not promising more than they currently have and consumers can continue with their purchase.

B2B COMPANIES SEE THE NEED TO STREAMLINE INVENTORY THROUGH INTEGRATION

Treating your ERP and eCommerce systems as separate entities disrupts the flow of inventory information that's crucial to showing customers the most up-to-date product data. B2B organizations, in particular, need to carefully monitor and reflect accurate inventory levels on their websites to meet customer expectations.

B2B consumers typically order larger quantities of items than their B2C counterparts, so businesses

must ensure they have enough inventory in their dedicated warehouse(s) to meet their needs. Displaying inaccurate inventory levels, having a customer order and then being unable to fulfill it, is sure to cost your business sales.

It's crucial that the ERP system, where inventory and warehouse information is stored, is integrated with a business's eCommerce platform so accurate inventory levels are displayed at the customer level. Without this interconnectivity, organizations run the risk of data inaccuracies that naturally come with manually inputting information.

In fact, Logistics Viewpoints found that inventory accuracy at distribution centers and warehouses that utilize automation and system integration ranges from 89% to 99%. In retail, where inventory systems are still reliant on manual methods, inventory accuracy drops to around 60%.

Receiving real-time updates on data inventory is not only important for delivering clients the correct information, but it also helps organizations keep their stock up-to-date. Only when ERP and eCommerce systems are integrated can the seamless, accurate movement of this data be accomplished.

DISTRIBUTION CENTER INVENTORY ACCURACY

With automation & system integration

89-99%

Manual inventory systems

60%



HOW INVENTORY WORKS WITH ERP COMMERCE™

Pixafy's erpCommerce™ solution was created with ERP as the core value add and insight from the experts at our sister company, Net at Work. Our highly flexible platform can be made to fit your inventory needs or be utilized in its default format to help B2B enterprises begin to streamline their processes.

With erpCommerce™, seamless integration of front and back-end systems can directly synchronize the product management loop. When a consumer makes a purchase, not only are they receiving the most up-to-date view on inventory levels, but the main warehouse, distribution hub and final POS all receive accurate, real-time information on the order and inventory status.

Even though Magento supports multi-warehouse operations, erpCommerce™ by default does not leverage this feature, but it can be extended via configurations to be used in specific cases.

By default in Magento, there will be a single value for inventory (on a per product level) where erpCommerce™ consolidates all inventory levels from the ERP into a single field or value. This is extremely helpful when managing inventory levels from multiple warehouses.

erpCommerce™ will then bring in in the per-location values from the ERP, but not update the products with it. Rather, we hold those values in a table that can be referenced when orders are sent down.

This lets the ERP know what levels to fulfill from and which warehouses the inventory will be shipped from.

The total of all values will then be imported from Boomi/ERP on a scheduled basis. This interval syncing can be determined in Boomi. This helps us choose which products display throughout the site and if they can be ordered or not. Basically, this will determine if inventory is available and show customers if enough product is stocked to complete their order.

erpCommerce™ by default does not re-check inventory at checkout (though it can be configured to do so), to allow backorders (when there is no inventory at the warehouse) and rely on the ERP for allocation and fulfillment of orders.

When B2B and B2C businesses allow backorders, they aren't missing out on a sale. This accounts for the opportunity that an item can still be shipped from other warehouses when they come back in stock on the default site via the ERP processes.

While these are mostly default options, erpCommerce™ is a highly extendable and flexible solution that can allow your organization to leverage multiple warehouses. Enterprises can sync inventory levels based on their needs, or choose not to track inventory at all. There are also options to automatically refresh inventory and do a final update at checkout. No matter what your needs are, you can ensure customers are receiving the most up to date inventory information to help with their purchasing decision.

erpCommerce™ is a highly extendable and flexible solution that can allow your organization to leverage multiple warehouses.

PRODUCTS

THE IMPORTANCE OF PRODUCT INTEGRATION FOR B2B ECOMMERCE

B2B customers are becoming increasingly familiar with the eCommerce landscape, and with that, their expectations of a seamless experience are growing. In fact, Forbes reported that B2B eCommerce is projected to be two times bigger than its B2C counterpart in 2020.

With this growing market for B2B eCommerce services, precise coordination between various lines of business is critical. Putting yourself in a buyer's shoes is the best way to begin understanding where and how they interact with your business.

There are multiple interactions with wholesale products that are paramount to completing a purchase. Without an organized, well-managed catalog showcasing the most up-to-date product information, buyers making purchases in bulk can easily become frustrated with the experience.

INTEGRATING SYSTEMS STREAMLINES PRODUCT MANAGEMENT

Both ERP and eCommerce systems can house important product data, but treating them as separate entities can impede how fast this information becomes customer-facing. When an eCommerce system is deployed as a standalone solution, information will need to be entered manually or imported from back-end systems, typically ERP.

A business's ERP system can contain a plethora of product information, including names, SKUs, descriptions and images, among other things. Transporting this data from one system to the other can be tedious and doesn't provide an accurate view of product data at any given time.

Only when these two integral systems are synchronized can the seamless flow of product

information ensure that online catalogs are showing the most relevant data to the buyer. Then, product attributes, category information, availability and related products defined in ERP can be shown on the customer-facing product page as well.

Using the ERP system as the single source of truth for product information not only confirms your eCommerce platform is accurate, but it can help customers find the product they are searching for faster even in a large catalog. A flexible integration solution allows your company to operate at peak efficiency and customize fields to meet specific product needs.

HOW NEW PRODUCTS AND UPDATES WORK WITH ERP COMMERCE™

Pixafy's erpCommerce™ integration solution was created with experts at our sister company, Net at Work. With ERP as the source of truth, we discovered that incorporating products as a standard touchpoint could help our customers better manage their online catalogs and further enhance the buyer experience.

SALES CYCLE TOUCHPOINTS:

- » Browsing products within your online catalog.
- » Selecting items and considering various configurations of the products.
- » Adding them to their cart.
- » Checking out, expecting the order to proceed and be fulfilled.



Integrating front and back-end systems is the perfect opportunity to clean up data to make certain your website is as user-friendly as possible. We recommend that before integration, businesses take the time to scrub down especially large product catalogs so they are suitable for the web.

During the initial setup of erpCommerce™, all products - regardless of their status - will be imported into Magento. If for some reason specific products don't transfer, an error will display in the Pixafy Magento module (Statistics) and the product will most likely need to be created manually.

After the initial setup and import, all subsequent product syncs will pick up only new products created after the last run or updated products since the last run.

PRODUCT IMPORT WILL SYNC:

- » Name
- » SKU
- » Images
- » Weight
- » Unit of Measure
- » Default price
- » Status
- » Sage ID

The sync or import can also put products into categories, as long as those categories are created in Magento and their IDs mapped to TSICOD values in Boomi. The integrator can be configured through Magento system configuration to use the ERP system's UPC field as SKU, or use product ID field as SKU (in case the UPC is not managed in ERP).

This should be determined before the first import, otherwise products will be duplicated with different

SKUs in Magento. Additional attributes can be included to a product sync as customization. For instance, you can choose to display an expected delivery date as a product attribute to be more transparent with buyers.

Having as much data as possible in your ERP system is important when it comes time to "publish" the products live on your online store. Depending on the information available in the ERP, products may be brought over to eCommerce as "unpublished/disabled." A user must go in and add the remaining marketing content that does not live in ERP and manually publish the item(s).

In this scenario, we can also bring in products as "published/enabled" if all the critical information necessary to present the product live is flowing over. We always work with customers to optimize this workflow and base our actions and recommendations on your specific requirements and existing data structures.

With erpCommerce™, you can choose to sync as much or as little product information desired. There is also the option to sync over partial data. For example, if you only want items with a specific code to be synced from your ERP to eCommerce platform, we can make that happen.

Integration can help you avoid creating extraneous product records and provide you with the opportunity to refactor your catalog to improve product classifications - all in the interest of enhancing the customer experience. Once products are set up, everything can be automatically updated so your website showcases the most recent product information.

CUSTOMERS

ERP ECOMMERCE INTEGRATION: THE IMPORTANCE OF INTEGRATING YOUR ORGANIZATION'S MOST COMPLEX TOUCHPOINT

For B2B organizations, customer service is paramount. With a longer sales cycle and more individuals involved in the decision-making process, there is more room for opportunity to lose the sale. On the other hand, B2B businesses have the chance to build customer loyalty during the sales process by improving their service model.

Delivering exceptional customer service begins by ensuring B2B visitors to your online store have the most seamless experience possible. From viewing products and pricing to checking out and receiving order updates, your ERP and eCommerce systems must communicate to keep the sales cycle flowing smoothly.

INTEGRATION ENHANCES THE B2B CUSTOMER EXPERIENCE

B2B customers desire an online shopping experience that is personalized and streamlined. In fact, Convenience and Convert reported that 74% of business buyers agree receiving personalized offers and experiences have a major or moderate impact on their loyalty.

Unlike a typical B2C business, these buyers are accustomed to unique pricing structures, special discounts and product offerings - all of which means that having one website for all consumers is difficult. When customer information lives in the businesses enterprise resource planning (ERP) system, it must seamlessly communicate with the customer facing eCommerce platform to ensure buyers are presented with the pricing and products relevant to them.

Businesses can tier their customers into groups assigning a unique pricing, product and payment to each. When they enter their account, they are then shown all the relevant information to make a purchase with minimal need to contact the business directly over the phone or through email which would slow the process. With their email and contact information, they can easily receive updates on their orders for a seamless experience from start to finish.

When front- and back-end systems can easily share customer information, buyers are having the best experience and are presented with the most accurate pricing and product information in accordance with their predetermined tier. Integration makes it possible to create a personalized experience for every business buyer, no matter their specific needs.

AUTOMATION REDUCES HUMAN ERROR

When ERP and eCommerce systems are integrated, they can automatically share customer information without the need for manual entry. This in turn reduces the chance for human error and is one of the most important benefits of integrating these two integral systems, according to Futurism.

For instance, when a business customer needs to update their information in the ERP system, the data will be automatically reflected in the eCommerce website. This helps eliminate the process of manually re-entering the data in both systems and reduces instances of data redundancy and error.

When automation reduces human error and streamlines back-end processes, customers have the best experience possible – and may not even know what’s happening behind the scenes. For businesses large and small, this can be the differentiator between themselves and a competitor and is important for standing out in the highly competitive business landscape.

THE IMPORTANCE OF ERP & ECOMMERCE CUSTOMER INTEGRATION

As you can see, ERP and eCommerce integration of customer information is crucial for automated data entry and enhancing the business-buyer experience, but the benefits of this unification don’t end there.

ERP integration empowers businesses to align their processes and relieve the operational burden of providing personalized purchasing processes for individual customers. A connected system means customers are easily categorized or tiered when they access their account, they’re presented with information relevant to them. This can include defining roles and capabilities that only allow the accounting team member to access financial information from the website, while buyers can only make purchases.

With ERP as the single source of truth that effortlessly communicated with the eCommerce system, businesses have the freedom to sort customers to enhance their experience and manage their sales. Instead of manually updating each system, teams can shift their focus to continue growing leads and communicating with buyers improving their efficiency overall.

HOW CUSTOMER INTEGRATION WORKS WITH ERP/COMMERCE™

With insight from subject matter experts at our sister company Net at Work, Pixafy’s erpCommerce™ solution was created with ERP as the single source of truth to simplify the integration process. Our integration process begins when a customer (the company) is created in the ERP. By default, all contacts already associated with the business will have customer records created in Magento with their important contact information and company level details.

Before starting the integration process, you may want to clean up your contact lists to ensure you’re only syncing accurate records. During this stage, you can also filter customer accounts and only sync contacts assigned with a specific role. These roles can have different capabilities, for instance, you can assign customers the role of a buyer so they can make purchases and only sync users with that role as part of their profile.

Once these accounts are created in Magento, an email either in the standard template or customized to your preference alerting them to the creation of this account will be sent out. New customers will be directed to access their new account and update their password with an enclosed link.

If a company does not exist in Magento, an entirely new record will need to be created for them using their company level details. This includes information ranging from company name, status, email, sales representative, VAT/TAX ID, Reseller ID, address, company administrator, credit, group, payment methods, shared catalog and shipping site, among other details.

It’s crucial to fill out these company level details accurately to create an account. Company credit will determine which contacts can order on account. The customer group identifies the customer group all contacts from the company are assigned to along with their tax class, pricing they see by default and ensures inventory is allocated properly when orders are sent to Sage. Integration of these systems helps determine the customer group as well as the customer’s credit balance. “Authorized Credit” in the ERP, on the customer level, will be synced to the “Credit Limit” field on the company record in Magento.

Pixafy’s erpCommerce™ solution was created with ERP as the single source of truth to simplify the integration process.

If there is a value here, we allow the customer to order on account. If there is no value, they must pay with a credit card.

We also determine if a customer can or cannot order on credit based on the following "Credit Control" settings. In this instance, the "Credit Level Total" in the ERP - again on the customer level - will be synced to the "Credit Balance" field on the company record in Magento. The available credit in Magento will then be calculated by subtracting the "Credit Balance" from the "Credit Limit," determining the amount a customer can order solely on account.

This is a completely flexible system, and we can "Allow to Exceed Credit Limit" on a per-company level in Magento. There are four scenarios that can occur: Customers can purchase without restrictions on account, only purchase up to their credit limit, must use a credit card for purchases or are blocked from purchasing.

All other values beyond those previously mentioned on the customer level in Sage will get synced to the contact records for that company in Magento. Integration means that when users are on the site, they are seeing the most up-to-date credit available, because any updates to a customer or company in the ERP will automatically sync over to the corresponding Magento records.

It's important to note that new customer records created in Magento (by customer registration) will not sync over to the ERP. These customers will only have B2C capabilities if the site allows for those kinds of transactions. If the site has no B2C, these customers will have no access to the catalog or orders until they are set up in the ERP and their details are synced.

erpCommerce™ ensures that customers cannot have duplicate accounts created with the same email. If a CONTACT in the ERP already has a B2C account for their email in Magento, we will receive an error when trying to create a Magento Customer for this user. These will need to be manually reviewed, and the admin will either need to change

the customer email in Magento directly or change the email associated with the contact record in the ERP. This ensures that the B2B and B2C user accounts are unique.

New customers are assigned to default settings with a PENDING status. The client will review the customer request and determine their credit limit and terms before manually setting them up as a Customer/Contact in the ERP.

Once the administrator completes this step, we will sync over all contact and company information to the Magento user and set them to the appropriate B2B "Customer Group" based on their ID or email match. If neither exist, a new company record must be created.

With the account synced, the customer will receive an email about their account in the ERP and will already know their password from being set up in Magento. Customer updates will not sync to the ERP. By default, customers will not be able to edit any company information or billing/shipping addressed in Magento as a B2B user.

B2C INTEGRATION

This integration is also available for B2C organizations. In this case, a B2C customer created in Magento will not automatically have an account created in the ERP. Rather, their orders in Magento will be associated with the "Web" specified by the user company in the ERP. All customer data will be retained in the ERP on the order level.

It is possible for users to have multiple web customers to route B2C toward, but it does require additional development - which is possible with Pixafy - in Magento and discovery needed to identify all the possible order and customer scenarios possible for this additional configuration.

Once these steps are complete, orders from B2C customers will sync over and update via Order/Fulfillment flows.

ORDERING

HOW ERP & ECOMMERCE INTEGRATION SUPPORT A SEAMLESS ORDERING EXPERIENCE

While every part of your business is important, it can be argued that ordering is one of the most crucial steps along the customer journey. If ordering is not made simple, you run the risk of cart abandonment and a frustrated customer. Furthermore, if order details are not correct, a customer who is relying on a fast shipment may experience delays. It's best to streamline this process and avoid these mishaps to build a loyal, satisfied customer base.

Customers expect an easy and precise ordering process to receive their products at the right place and time. Integration helps eCommerce sites meet these goals as well as aid inventory and budget management.

B2B ORGANIZATIONS REQUIRE STREAMLINED ORDERING

When a customer places an order, they expect it to be completed in a timely and accurate manner. This is doubly true for B2B customers who often rely on bulk orders to fulfill their own operational needs. Barilliance found that the average eCommerce store loses over 75% of its sales to cart abandonment - and while this is a general fact applied to both B2B and B2C organizations it is still an enormously large number.

For consumers, abandonment can be chalked up to sticker shock or unexpected shipping costs. However, B2B customers desire convenience overall. Business 2 Community explained that these consumers desire a seamless ordering process that can be achieved by eliminating the need for inputting duplicate data and be presented with the option to autofill details or repeat an order when necessary.

While B2C customers may be making a one-time purchase, B2B organizations require that their ordering process is streamlined, secure and accurate. Without this, businesses may experience a higher rate of cart abandonment or less frequent orders. Making the ordering process as easy as possible enhances the customer experience and builds loyalty and trust between businesses and consumers.

THE IMPORTANCE OF ERP & ECOMMERCE ORDER INTEGRATION

When your business's ERP and eCommerce systems work separately, there is room for error that can impede the progress of your business. It's of the utmost importance that during the ordering phase a customer's data is automatically populating both back- and front-end systems.

As a customer enters their payment details, their customer or company profile containing their shipping address must be accurate for the order to be sent to the correct location. Additionally, this information determines which warehouse is to fulfill the order for optimal fulfillment and shipping time.

Without integration, these processes are left to be completed manually where the room for human error increases. If order information is not integrated and updated regularly, organizations run the risk of sending shipments to the wrong address or warehouse, slowing down on the promised shipping time and leaving hopeful customers disappointed. Only by integrating these two integral systems can you business ensure your ordering process is streamlined and accurate to the benefit of your organization and customers.



HOW ORDERS WORK WITH ERP COMMERCE™

Pixafy's erpCommerce™ solution was created with input from subject matter experts at our sister company Net at Work. With our combined expertise, we have designed our solution with ERP as the core value add. For B2B enterprises hoping to deploy eCommerce quickly, our default format for ordering is an ideal start for optimizing their online presence and can be customized to meet their specific needs at a later date.

In erpCommerce™, order details move from Magento to Boomi and then from Boomi to the ERP. During the second transfer of information, the Sage ID is passed to the order level so orders can be assigned to the ERP customers when they come in, effectively streamlining the process. When a customer is already set up in the ERP, the the ERP ID is automatically sent with the order.

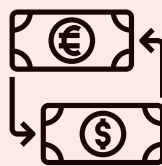


From there, the customer has two distinct paths to place an order:



CREDIT CARD:

When an order is placed on a credit card, the payment will be processed via Magento/Payment Gateway. The authorization and capture automatically creates an invoice in Magento and the transaction ID will be passed to the ERP with the order and prepayment. From there, your business will pick, pack and ship out the order.



ON ACCOUNT:

A customer is only allowed to pay on terms if allowed by the system (they are allowed a company credit limit). However, if the items in their order exceed the "Company Credit Limit" synced from the ERP, then a message will appear urging the customer to please pay via a credit card or contact us to add credit to their account.



Once the customer enters their desired payment method and it is accepted by the system, the order will then be passed to the ERP. If a customer paid by credit card, their prepayment would be included. However, if they paid on terms within their credit limit, a prepayment will not be included. The invoice process will all take place within Sage.

It's important to note that when the final order is created in the ERP, it should be associated with the correct company or customer because the "Ship Site" for orders will ultimately be determined by the associated "Ship To Address" in the ERP. This also determines the logic for which warehouses will fulfill each order.

erpCommerce™ automatically updates customer information. For B2B users, we only sync addresses from the ERP to Magento. This means that when a user places an order, they will only be able to use a pre-approved address from the ERP system. This method effectively reduces the chances for orders being shipped the incorrect or outdated address and streamlines the process of updating all the customer information needed for the order.

For B2C customers, ordering follows much of the same initial process. However, only credit card payments are acceptable for B2C orders and they will be processed via Magento/Payment Gateway. The authorizing and capture creates an invoice in Magento and we then pass the transaction ID along with the order to the ERP with a prepayment.

Once the order is sent to Boomi, the status in Magento should change to "In Process." Again, the order should be associated with the same customer as identified in the B2C "Customer Sync" process to ensure the order is being fulfilled by the correct warehouse.

Like with our other touchpoints, the order process in erpCommerce™ is able to be customized to a customer's needs. We can extend multiple orders to different shipping locations and ensure that Magento does not charge a cart upfront. This means that if a customer orders 20 items but only 15 are in stock, only 15 items will be sent and charged for - no refunds necessary.

If more complex logic is needed for your organization's ordering process, Pixafy can support it because erpCommerce™ is designed to be scalable.

INVOICES

HOW ERP & ECOMMERCE INVOICE INTEGRATION HELPS B2B COMPANIES STAY ORGANIZED

Invoicing is an often overlooked touchpoint. After all, it's nestled between two, arguably more important functions of ordering and shipping which both directly affect the customer. However, without an effective invoice process, there would be no seamless transition from ordering to shipping. Having an effective invoicing process is crucial for collecting payment information, triggering shipping in a timely manner and keeping accurate financial records. One flaw in the system could result in delays in collecting important payments and shipping that can leave B2B customers feeling aggravated that a supposedly streamlined process has been halted.

Today, many businesses have automated their invoice processes to improve its accuracy and avoid common mistakes that could occur manually. Even if your business's invoice process is automated, if it's not integrated between front and back-end systems then it's still not as effective as it could be.

B2B customers expect a seamless shopping experience from your business, and no touchpoint that has the potential to affect their experience should be ignored. Keep reading to learn how integrating your ERP and eCommerce systems can help streamline and organize the invoicing process to the benefit of your business and the customer journey.

BEST PRACTICES FOR B2B INVOICE PROCESSING

Invoicing is a critical component of your everyday business operations. Being able to process payments correctly may sound easier than it seems, so let's explore some of the best practices for invoicing to show how integration can benefit them:

Send it as quickly and accurately as possible: As the first step in accounts receivables management, it's of the utmost importance to send and receive invoices as quickly and accurately as possible to properly manage your cash flow. Ultimately, if your customer never receives an invoice, your business will never get paid (or everything will be delayed trying to figure out what went wrong). Keeping invoices moving in a timely manner ensures your business receives payment and your customers know what exactly they're paying for.

Keep all invoices in an organized system: Forecast recommended storing all your invoices in one centralized place. Having all your records on hand - for both past and present transactions - helps your team when they need to look back at customer history. You can review when a customer received an invoice and if it was paid so you can send a gentle reminder for them to pay.

Ensure you're documenting all necessary information: Invoices require more information than just customer payment information and names. They must include information on the order, totals, due date, company name and other important payment terms that affect how the order will be processed and subsequently shipped.

Use invoices to improve the customer relationship: Even if invoices seem to be in the background of customer relations, they are an opportunity to connect with your consumer. Momentum suggested using the invoice process as an extension of the customer relationship. Send simple, yet personalized invoices to customers, friendly reminders to collect payment, and finally, a thank-you note when done.

THE IMPORTANCE OF ERP & ECOMMERCE INVOICE INTEGRATION

All of the aforementioned best practices of invoicing can only be achieved by integrating your business's ERP and eCommerce systems. When your invoice system is connected to front and back-end processes that include customer and order information, keeping track of payments is a breeze.

With these two essential systems working seamlessly together, you have all the information on the customer, order and payment method that you need to create a complete and accurate invoice. As the system automatically updates with new information, your invoices will reflect that so there will be no mishap of sending the invoice to the wrong customer.

Furthermore, having front and back-end systems integrated allows you to keep all invoicing information in one convenient place no matter how or where a customer places their order. As you will see, a solution that opens the flow of information between ERP and eCommerce systems can help your business organize and optimize its invoicing process.

HOW INVOICING WORKS WITH PIXAFY'S ERP/COMMERCE™

With assistance from the subject matter experts at our sister company Net at Work, Pixafy created the erpCommerce™ solution to integrate two essential systems to enhance the B2B customer experience. With ERP as the core value add, B2B enterprises can enhance customer touchpoints to improve their business. Even though invoicing is often a process that is overlooked, we saw how our standard solution could be the jumping-off point to improve methods and be tweaked at a later date to include customized workflows.

While invoicing is a relatively simple touchpoint, we created a standardized process that can be deployed quickly to immediately improve the process. For B2B and B2C customers, the invoicing process begins when an order is placed in the system. Any posted invoices for orders in Sage that are associated with orders placed on Magento will be synced over to Magento's customer invoices entity.

Users can be granted access to review the invoice history in Magento from "My Account" and then

"My Invoices" section. In this section, authorized users will be able to view:

WEB INVOICES:

Review all invoices associated with orders placed on the web. These invoices were originally created via Magento and are considered native Magento invoices.

You will find these invoices in Magento under:

"My Account" » "Order History" »
{select a specific order} » "Invoices"

ERP INVOICES:

Find all invoices associated with orders placed on the web that were created via the ERP.

You can find these invoices in Magento under:

"My Account" » "Order History" »
{select a specific order} » ERP Invoices"

ALL INVOICES:

For a comprehensive look at all invoices, find a complete list of both ERP and Web invoices at your fingertips.

It's important to note that imported ERP invoices will always be associated with a specific order and customer ID. This will only be visible to the customer who created the order and any members of the company who is designated at a level higher than the current user or otherwise authorized to view all orders. For a refresher on erpCommerce™ ordering processes, review our previous blog post in the series that covers integrating this other crucial touchpoint.

Automatically filing invoices in this way and being able to sort them allows your internal teams to stay organized and on top of payments easily - no more manually wading through invoices to collect your hard-earned sale. All the while, your customers will continue to experience the seamless journey they have come to expect from your brand.

While the above details how our invoice touchpoint works with our standard erpCommerce™ solution, it's a scalable process that is able to accommodate alternative workflows on a business-by-business basis. Custom functionality can allow parent users, like those in the finance department, to review all invoices while that information is hidden from other users. Additionally, the invoicing process itself can be customized to further identify the sources of the order and determine payment terms.

SHIPPING

THE IMPORTANCE OF INTEGRATING SHIPPING TO END A SEAMLESS B2B ECOMMERCE CUSTOMER EXPERIENCE

The final touchpoint in the customer journey is shipping. Even though it's viewed as the ultimate destination in the trip and last contact with a customer, fulfilling and shipping orders is an opportunity to build loyalty with your B2B audience.

When an order is processed, B2B customers expect it to be delivered on time, to the right location with the correct products. They rely on an accurate and timely delivery to maintain their internal processes, so it's of the utmost importance to not overlook this final touchpoint. When shipping is done correctly, it can build trust between businesses and customers and lead to more orders. On the other hand, when shipping goes awry, it can lead to confusion and frustration for both parties involved.

Accurately fulfilling orders relies on the cumulation of all the information collected throughout the customer journey. From customer information to order details and payments, one piece of data out-of-place can cause a delivery to be delayed, misplaced or duplicated. When this information is siloed between front and back-end systems and shipping relies on the manual relaying of data, it opens up the process to these faults.

Only by integrating your business's eCommerce and ERP solutions can you achieve a seamless and efficient shipping process that benefits your organization and enhances the customer experience. Let's continue to explore the importance of this final touchpoint and how your business can optimize it.

68% of online shoppers review the shipping policy before making a purchase.

HOW TO USE YOUR SHIPPING PROCESS STRATEGICALLY

Shipping is much more than just transporting a product from one location to another, and businesses shouldn't view it as such. Bigcommerce explained that the most successful B2B merchants use strategic shipping options to differentiate their brand and increase margins. To achieve this, businesses must be sure to set clear goals, choose a shipping strategy and continue to innovate their processes along the way.

While there are an endless number of goals you may want to achieve from optimizing your shipping such as lowering costs, expediting processes and so on, you should be strategic with how you achieve said goal. While many businesses laud free shipping as the No.1 thing customers desire, this isn't necessarily true for B2B organizations.

In the B2B eCommerce space, free shipping is usually impractical and fails to impress customers. Rather, their companies should focus on ensuring their eCommerce platform allows for accurate dimensional-based pricing. As discussed in our previous pricing blog, this individualized approach to sales is possible and encouraged.

Furthermore, businesses should provide a page on their shipping policy. Shopify reported that 68% of online shoppers review this policy before making a purchase, and this page can also include information on tracking shipments, returns, delivery times and more. Of course, this consolidated data is only available if shipping is integrated with customer and order information, and this is why merging your business's two integral systems is essential.



THE IMPORTANCE OF ERP & ECOMMERCE SHIPPING INTEGRATION

As you can see, shipping extends beyond just a delivery, it uses the foundation of customer information collected throughout the journey to fulfill orders correctly and efficiently. It relies on data from every previous touchpoint to complete its goal, and that's why it must be integrated between ERP and eCommerce systems.

With a streamlined shipping process that can easily pull customer and order information, B2B businesses can distinguish themselves from the competition. USPS explained that there are a plethora of emerging opportunities in the B2B shipping landscape for organizations to capitalize on. This includes new technologies helping optimize and automate shipping processes and extending this final touchpoint to boost customer loyalty.

Furthermore, integrating shipping with other touchpoints helps businesses stay organized. With the correct customer information that is automatically being updated, businesses avoid sending shipments to the wrong location or duplicating orders. This is just touching the surface of why integrating shipping between ERP and eCommerce platforms is important, but the discussion around the solution that accomplishes this will shed light on some more reasons.

HOW SHIPPING WORKS WITH PIXAFY'S ERPCOMMERCE™

Pixafy has created the erpCommerce™ solution with help from our sister company Net at Work. By integrating front and back-end systems with ERP as the core value add, B2B businesses enhance touchpoints from customer information all the way to fulfillment. As the final touchpoint in the series, we understood that shipment is an opportunity to grow loyalty among a B2B customer base.

Our standard shipping integration is the same for B2B and B2C businesses and can be deployed quickly for businesses needing to optimize their fulfillment processes. That being said, it can easily accommodate custom workflows on a company-by-company basis. All shipments are first prepared and then validated in the ERP. Once validated, it automatically sends a tracking number and quantity of items per shipment to Boomi.

From there, Boomi triggers a "shipment" to be created on the respective order in Magento. This includes all information on the shipped items, quantities and tracking information. As you can see, this wealth of data comes from the previous touchpoints on the customer, pricing and order ID. This also allows for multiple shipments to be placed for a single order while ensuring that no order itself is duplicated to be sent more than once. This helps businesses keep track of their inventory and invoices and gives customers the power to track their orders.



Magento automatically sends an email to the customer with this shipment information as well so they can ensure it's being delivered to the correct location at the tight time. This is another important opportunity to connect with the customer. With erpCommerce™, businesses can customize this email to let customers know what products are being shipped and highlight any upcoming promotions to encourage future sales. With the ability to personalize the messaging in each email, businesses create a better bond and build loyalty with existing customers.

Whenever a shipment is updated in the ERP after being sent to Boomi or Magento, we will look for the time stamp on the update to ensure it's synced. This helps avoid any confusion over changing customer details including shipping address or order quantities. Additionally, we are always tracking the shipment process on the business end to ensure customers are receiving the most up-to-date information on their orders. For instance, if two items go out with their first shipment, we will update the record in Magento and the customer accordingly. This commitment to detail and customer

communication ensures the shipping process is transparent. Integrated with other details from the customer journey, shipping is streamlined and forgoes the manual processes that can cause an error.

Our standard erpCommerce™ solution enables customers to go to market quickly but is also scalable enough to be customized in the future. For instance, shipments can have a customized integration with payments to ensure that credit cards are only charged once items are shipped. This effectively automates the process and ensures that shipment triggers payment collections. However, this is just one example of how our shipment integration can be customized to fit your business's immediate needs and long-term plans for growth. Our experts are always happy to discuss how else we can personalize the process for your unique business operations.

Our standard erpCommerce™ solution enables customers to go to market quickly but is also scalable enough to be customized in the future.



ERP & ECOMMERCE SPECIALISTS

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Creating a seamless experience leaves customers with a positive memory of your business. B2B customers, in particular, care less about free shipping and more about receiving the correct orders at the right time and location for the previously agreed-upon price. Pixafy's standard erpCommerce™ can help businesses achieve this quickly so your organization can exceed customer expectations right away. This swift delivery is made possible because our solution can work alongside your ERP system.