



Active HUB

Integration Hub Supporting
Digital Commerce and
Operations

B2B Portal that Integrates
Acumatica, BigCommerce, and
any App with an API

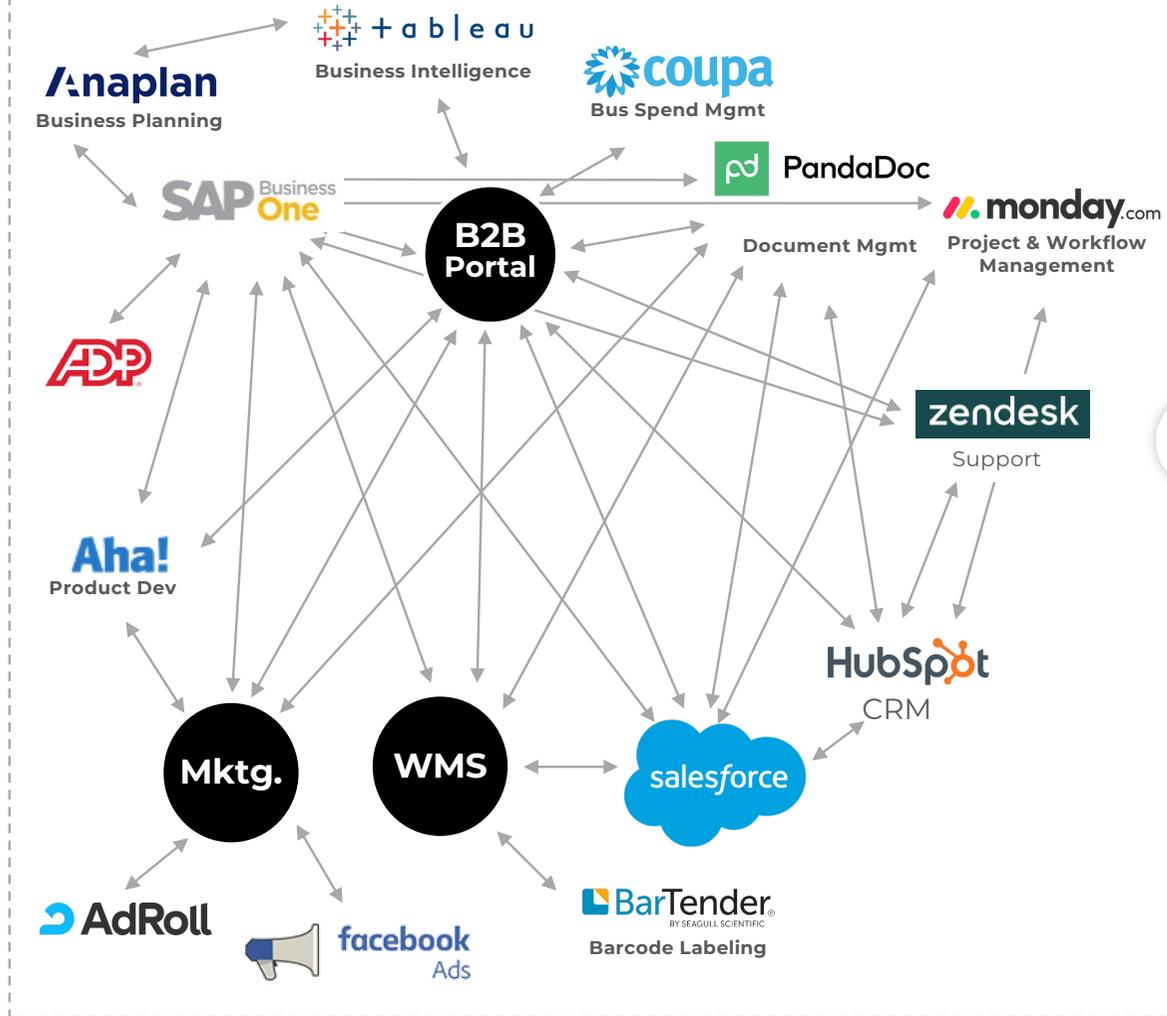
March 28th | 2023



**Cloud-Based Interconnectivity
Enabled by Active Hub**

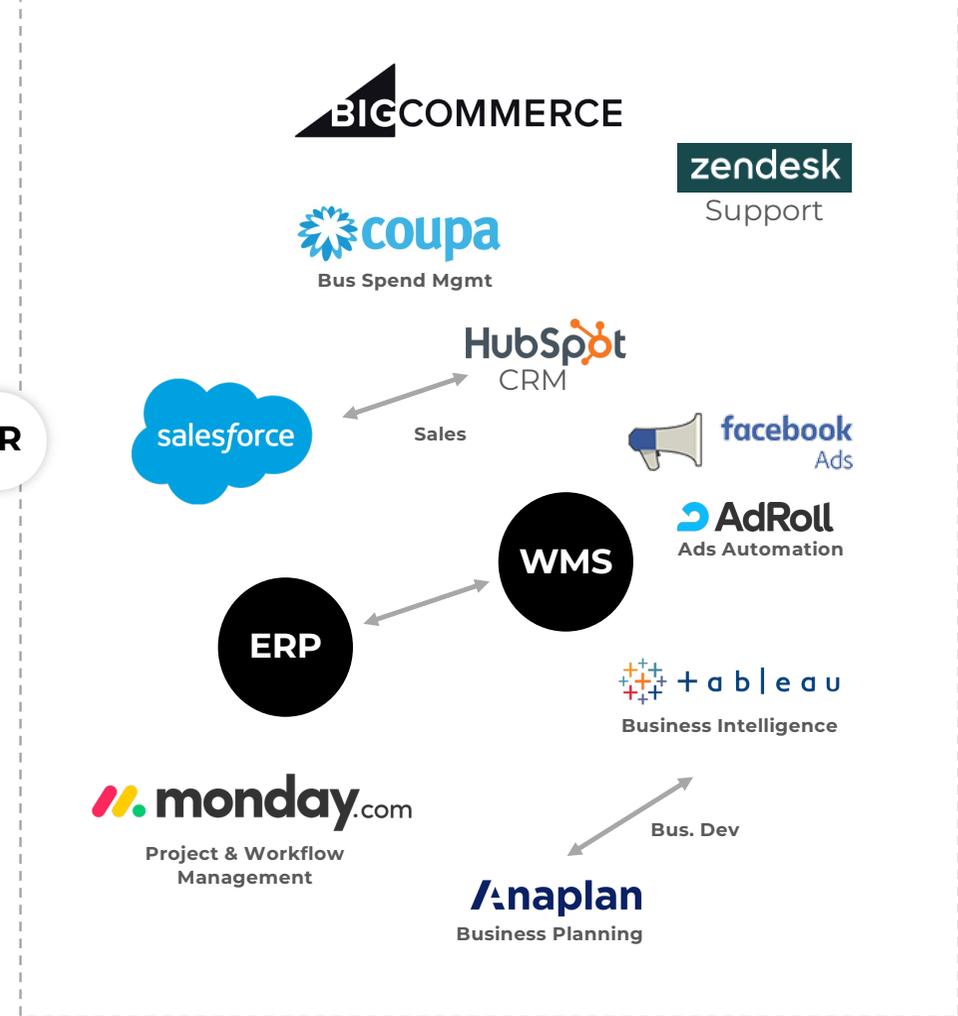


Complex System Hard to Manage



OR

Unconnected System inefficient, info lags





Active Hub: Manages Integration Just Right — Priority Connections

It couples together two cloud-based solutions: Acumatica [ERP] and BigCommerce [Digital Commerce]

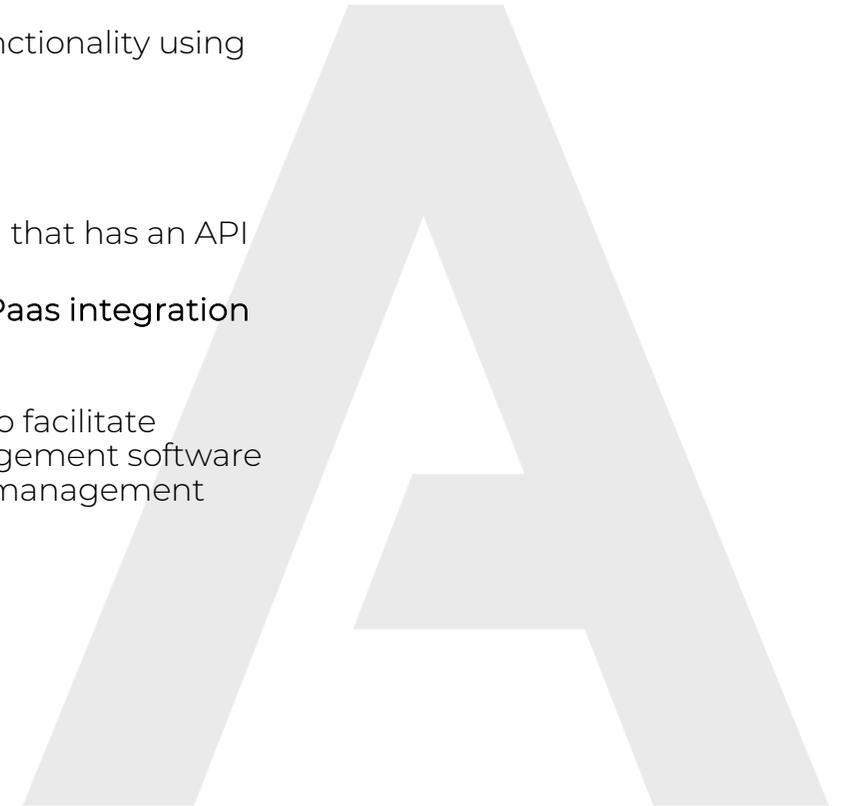




Active
HUB

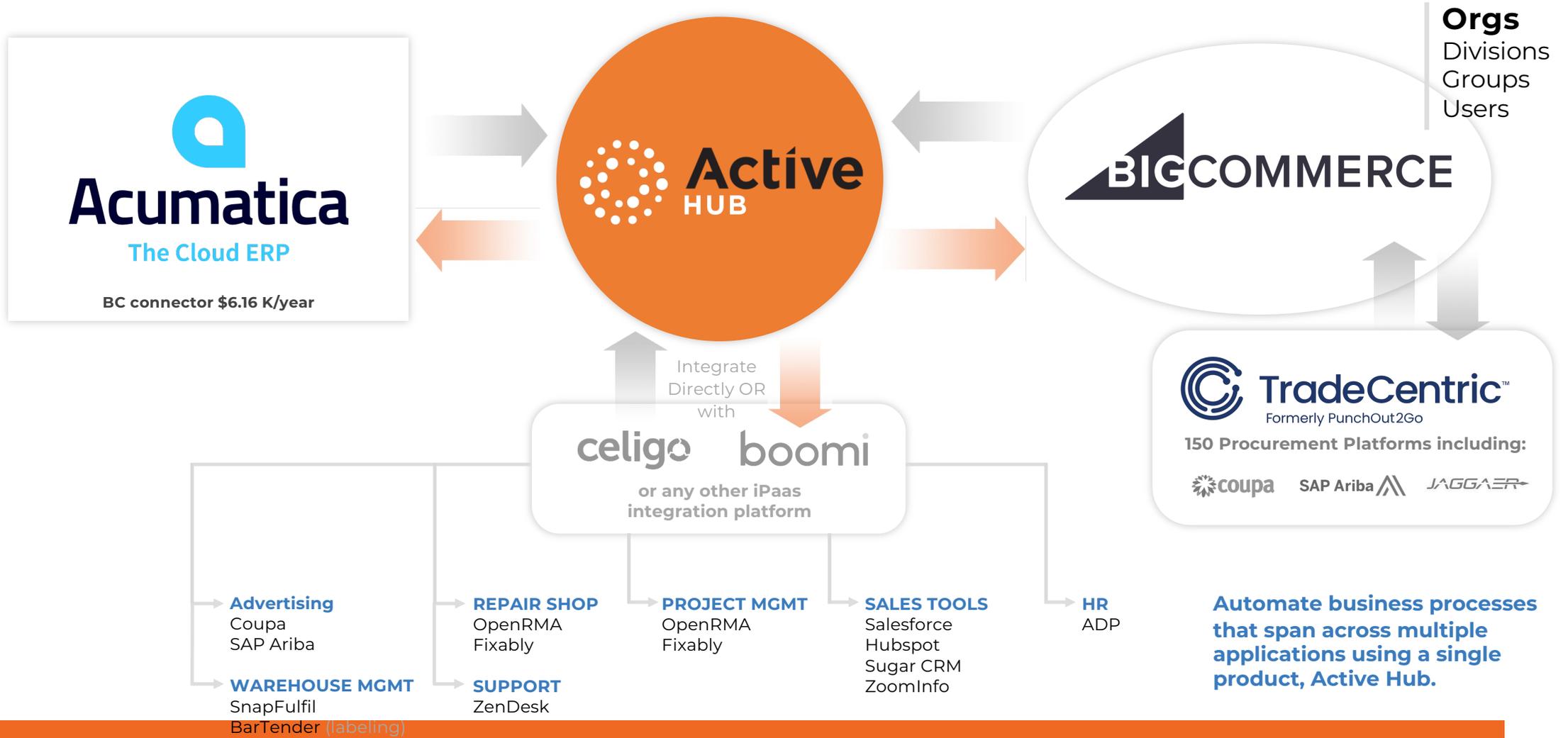
Active Hub extends what is possible

- Active Hub interacts directly with **Acumatica**. Additional functionality using Acumatica data can be designed into Active Hub.
- Active Hub interacts directly with **BigCommerce**.
- Active Hub can integrate directly with any **other application** that has an API
- Active Hub can integrate with **Celigo, Boomi or any other iPaaS integration platform** (a cloud-based platform for doing integrations)
- Active Hub works with **TradeCentric** within BigCommerce to facilitate purchasing from enterprises that use business spend management software such as Coupa, Ariba, Jaggaer, and/or any one of 150 spend management platforms





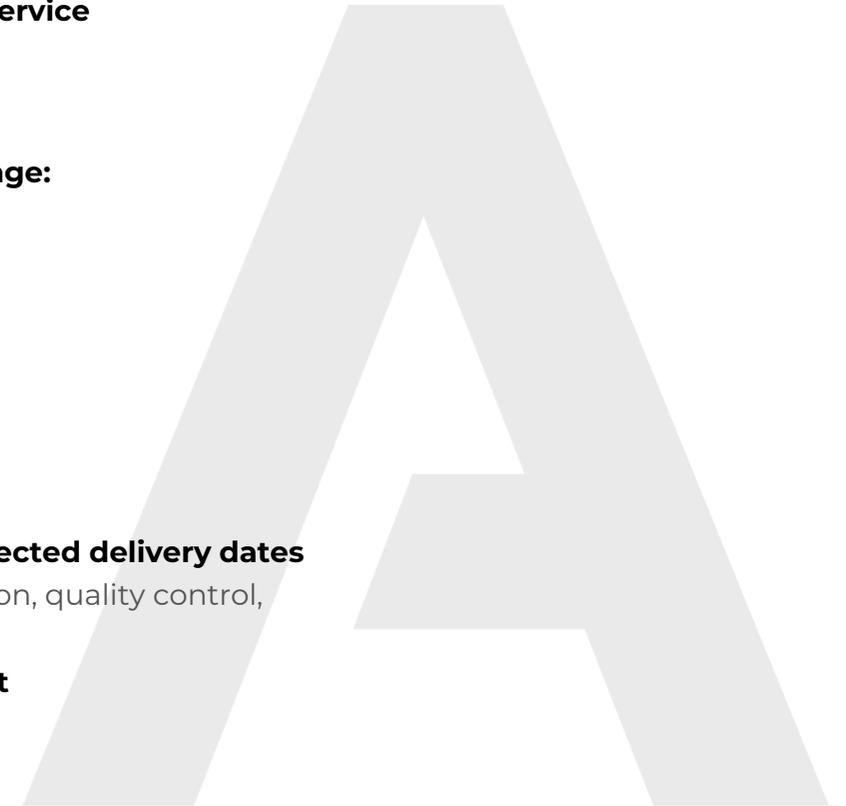
Active Hub: Manages Integration Just Right — Specialty Solutions





Overview of Functionality

- **Customers make B2B purchases or engage and schedule service**
 - Record purchaser whether 1st impersonator or not
- **Customers Pay invoices online**
- **Core business functionality that Customers view and manage:**
 - Contacts/users
 - Permissions
 - Addresses
 - Quotes
 - Orders
 - Shipments
 - Invoices
 - Payments
- **Track orders from submission to delivered-status with expected delivery dates**
 - Track status of order from pick/pull, shop floor/production, quality control, packing, shipping, delivery
- **Include information from Acumatica wherever it is relevant**
- **Keep track of integrations**
 - Name
 - URL, Credentials
 - Description
 - Flows





B2B Functions

Admin Actions for Facility Manager (direct login)

The screenshot shows the Van Dyk Direct B2B portal interface. At the top, a red banner contains a notification: "Please note that our company will be closed on Memorial Day, Monday, May 30". Below this, a blue header bar displays account details: "Acct #: 1469", "Account Name: Waste Management SPRINGFIELD", "Acct Status: Good Standing", and "Group Address P.O. BOX 6700, Oregon, United States 972286700".

The main content area features the Van Dyk Direct logo and the text: "Browse parts, get a quote, place an order. It's parts ordering made easy." Below this is a search bar with the placeholder "Enter Search Term or Product Name", a dropdown menu set to "All Products", and a search icon.

A navigation bar below the search bar includes "Products", "Orders & Shipments", and "Quotes". The "Products" dropdown menu is open, listing categories: AIR SYSTEM, BALER, BEEPRO, BETONBLOCK, CONVEYOR, and EDDY CURRENT.

On the right side, a user profile is displayed: "Good Afternoon WASTE MANAGEMENT SPRINGFIELD Manager - Jim (Logout) Role: Facility Manager". A dropdown menu for "Admin Actions" is open, listing the following options: Admin Actions, My Account, My Quotes, Orders (placed online), Returns, Shipments, Invoices, Payments, Product History, and Contacts.

At the bottom of the page, there are several product cards with "Buy it Again" buttons. One card shows a conveyor belt, another shows a roll of pink material, and a third shows a metal rod.



Buying can involve multiple levels of management

- **BigCommerce is set up so that one user is one customer**
- **Acumatica organizes each Customer is one company with possibly multiple contacts and addresses**
 - An Acumatica Customer can have a Parent Customer
 - Has contacts but generally does not support website users
- **The most general situation for a Buying Organization is a hierarchy with**
 - Organization – corporate managers
 - Divisional managers – oversees multiple work groups
 - Work Group such as a facility, a job shop, a property, etc
 - People within a work group including the work group manager
- **Active Hub preserves this hierarchy for Customers of the App-Owner**
 - A customer can be a flat “company” without regions or groups
 - An organization, region and group record is created for each company
 - a default, generic entity is used if it is not relevant to a flat company
 - All users in a Group create and see information for the whole group:
 - account info
 - past orders
 - buy-it-again products
 - group catalog
 - invoices
 - shipments



Purchasing Models

When any company makes a purchase, (in this case a customer of the app-owner), the management of the buyer-company has to provide oversight to how their money is spent.

These are the different purchase flows that Active Hub supports.

- 1. No approval needed**, direct purchase by user
Payment method is PO or credit card
- 2. Quote**
Quote generated, approval sought then granted with PO#; release and pay; place order; order fulfilled; invoice generated. Purchasing organization can assign permissions so that the doer who needs the items must have manager sign-off, or not. (Direct purchase allowed, authorization required, or stop access (e.g. employee is no longer employed))
- 3. Procure-to-Pay Purchasing Systems [P2P]** (Ariba, Jaggaer, Coupa, SAP, Oracle and others)
This is used for large enterprise corporations and automates the generation of an approval and a purchase order number. User starts on the website, submits the purchase request to the purchasing system where approval is sought (PO provided?), then order comes back to vendor with approval; the order is generated; order is fulfilled; invoice is generated
- 4. Integration bridge to Procure-to-Pay [P2P]** purchasing systems using Celigo or TradeCentric
TradeCentric (formerly PunchOut2Go) provides an affordable way for a Vendor to sell to a big enterprise Customer that uses a P2P purchasing system. The app-owner creates uses Customer Groups their B2B BigCommerce store. A Customer-user/buyer starts a session on their P2P system, such as Coupa, then they “punch out” and go TradeCentric software that forwards them to the B2B portal; the user orders from the B2B portal. TradeCentric software then submits the purchase request to the Customer’s P2P system; receives back permission with a PO number; submits the order to the app-buyer’s B2B portal with a PO#; the app-buyer fulfills the order; and then generates an invoice. The same integration can be set up using Celigo.

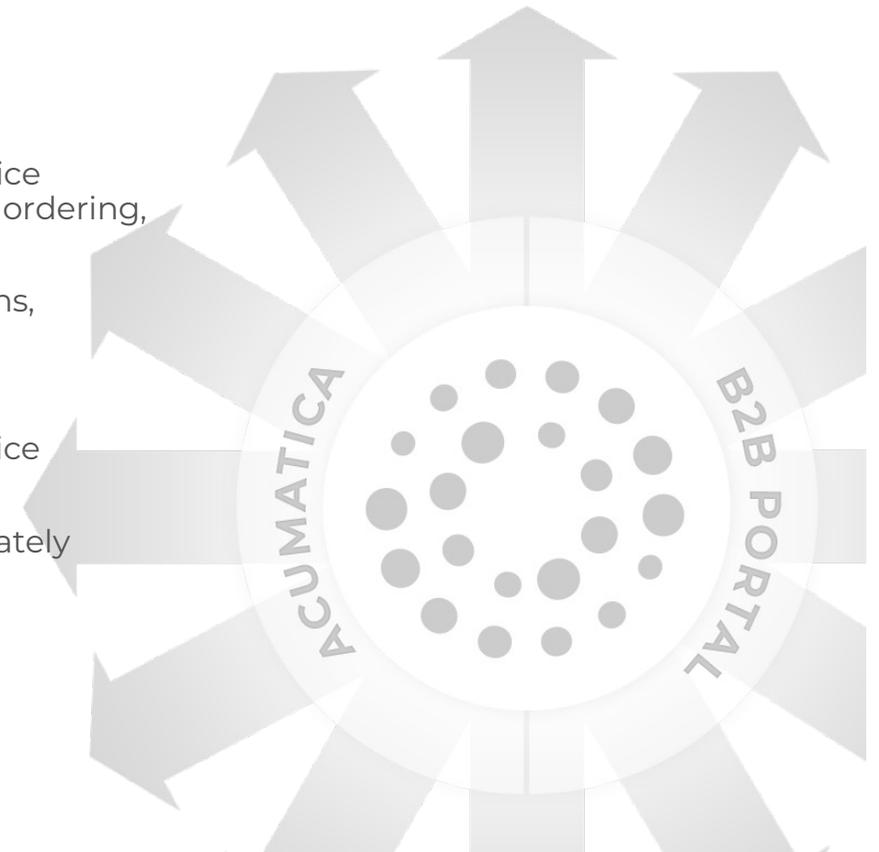


Summary

Active Hub provides a B2B portal integrated with owner's ERP system, cloud-based Acumatica, with the ability to add integration spokes to other software solutions, as needed.

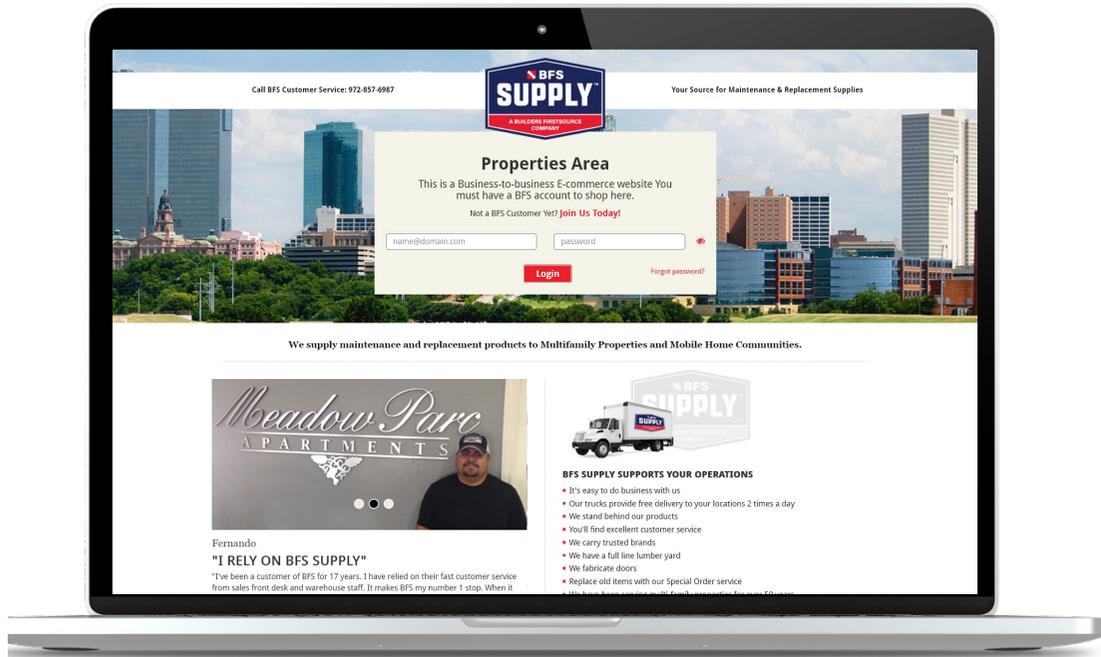
BENEFITS

- Facilitate customer ordering: up-to-date product or service offering, less human interaction, accelerated cadence of ordering, smooth error-free fulfillment
- Help customers have more visibility into their transactions, invoices, shipments and payments
- Help salespeople be more productive
- Provides a user-friendly user-interface for customer service
- Connect the app-owner's ERP/B2B-portal with other software solutions so that information can flow appropriately



Over 20 years of Integration Experience Active Lightning

- In 2002, Active Lightning integrated the production of a print catalog with an Epicor point-of-sale system called Eagle
- In 2004, integrated Eagle with a custom ASP.Net shopping cart website that was built for a multi-store appliance parts company
- In 2006, integrated Eagle with an ecommerce website and Amazon
- In 2008, Active Lightning integrated a hardware supply company's point-of-sale system with its website and integrated the website with Princeton University's spend management (P2P) system
- Many other integrations between Eagle and ASPDotNetStorefront using our software product ActiveTransfer
- 2017 to 2020, Active Lightning customized an ASP.Net ecommerce solution and created integration executables to a little known Epicor ERP called ECSPPro. We built out this custom B2B portal working with a decision-maker who understood the needs of the business and the 10 different roles of people using the website. Project was originally done for a Dallas/Ft. Worth company that services apartment building maintenance, rehabs and mobile home communities. Later this company was purchased by a publicly traded company, Builder's First Source. The website is being used to further develop the business and roll it out to other markets.
- 2021, Active Lightning completed 2 additional B2B portals after the one for BFS Supply and prior to Active Hub





Following are Active Hub features that are not included in BigCommerce's Bundle B2B

- All Work Group users can see and work with orders placed by anyone in the group
- Supports Organization and Regional/Division level in addition to Company or Group level
- Shows invoices, shipments and payments from Acumatica with no Acumatica customization
- Provides ability to pay invoices online
- Shows who placed the order; even if order placed by impersonation will show person who did impersonation
- Enables zero-cost warranty orders (by customer service)
- Provides ability to pay by Acumatica Project ID and Project Task with a drop-down of valid projects for the customer work group, then associated list of tasks for that project
- Can determine allowed payment methods by role and by company/group
- Better impersonation – same as what is available from BigCommerce admin but from front-end website
- Extra quote capability: ability to email quotes, add or take away line-items, archive quotes, release & pay from front end
- Special reporting for corporate managers
- Can integrate with P2P systems (needs TradeCentric solution, paid separately)
- Offers similar quote capability to Quote Ninja as well as other quote capability
- Supports the ability to integrate with best-of-breed software solutions such as Salesforce or Zen Desk